Perceptive Content

Manage Documents User Guide

Version: Foundation 23.1

Written by: Documentation Team, R&D
Date: Friday, February 13, 2026

Documentation Notice

The information in this document may contain technology as defined by the Export Administration Regulations (EAR) and could be subject to the Export Control Laws of the U.S. Government including for the EAR and trade and economic sanctions maintained by the Office of Foreign Assets Control as well as the export controls laws of your entity’s local jurisdiction. Transfer of such technology by any means to a foreign person, whether in the United States or abroad, could require export licensing or other approval from the U.S. Government and the export authority of your entity’s jurisdiction. You are responsible for ensuring that you have any required approvals prior to export.

DISCLAIMER: This documentation contains available instructions for a specific Hyland product or module. This documentation is not specific to a particular customer or industry. All data, names, and formats used in this document’s examples are fictitious unless noted otherwise. This document may reference websites operated by third parties. In such a case, Hyland has no control or liability for the content of such third-party websites. The inclusion of such a link shall not constitute an endorsement or affiliation with such a third-party website; the reference is provided for information purposes only. If you have questions about discrepancies in this document, please contact Hyland. Hyland customers are responsible for making their own independent assessment of the information in this documentation. This documentation: (a) is for informational purposes only, (b) is subject to change without notice, (c) is confidential information of Hyland Software, Inc. and its affiliates, and (d) does not create any commitments or assurances by Hyland. This documentation is provided “as is” without representation or warranty of any kind. Hyland expressly disclaims all implied, express, or statutory warranties. Hyland’s responsibilities and liabilities to its customers are controlled by the applicable Hyland agreement. This documentation does not modify any agreement between Hyland and its customers.

Table of Contents

Manage documents

Document types

What are document types?

Document types are document properties that uniquely categorizes a document so that it is similar to the document's drawer or folder, regardless of the document's folder or drawer location.

You assign the document type when capturing the document or when you define its properties, and you can also modify the document type after it has been initially assigned. However, you can assign only one document type to a document.

Document types can include custom properties, which are additional properties to which you can assign values.

Add a master form to a document type

To add one or more forms to a document type, complete the following steps.

Prerequisite The automatic form identification feature must be installed, licensed, and enabled and, for scanned master forms, you must have a scanning profile defined for the scanner.

1. In **Management Console**, in the left pane, under **Select Department**, select a department from the list.
2. In the left pane, click **Document Types**.
3. In the right pane, select a document type and click **Modify**.
4. In the **Document Type** dialog box, on the **Forms** tab, click **New**.
5. In the **New Form** dialog box, in the **Name** and **Description** boxes, enter a name and optional description for the form you are adding to this document type.
6. Do one of the following actions.
   - To import a master form from your file system, in the **Source** list, select **File > Browse**, locate and select the file, and then click **OK**.
   - To scan a paper master form, make sure your scanner is turned on and connected, and then insert the form to be scanned. In the **Source** list, select **Scanning Profiles**, in the **Profiles** list, select the scanning profile, click **Scan**, and when the scan is complete, click **OK**.

Add a document type

To create a new document type for document categorization in Perceptive Content, complete the following steps.

1. In **Management Console**, in the left pane, under **Select Department**, select a department from the list.
2. In the left pane, click **Document Types**.

3. In the right pane, on the **Document Types** tab, click **New**.
4. In the selected row under **Document Type**, type a name for the document type and then press `ENTER`.
5. Select the new document type and then click **Modify**.
6. In the **Document Type** dialog box, on the **General** tab, type an optional description for the document type and select the **Is Active** check box.
7. Optional. On the **Custom Properties** tab, assign custom properties to the document type.
8. Optional. If you want **Perceptive Content** to verify signatures for this document type, do the following substeps.
    1. On the **Digital Signatures** tab, select the **Automatically verify signatures for this document type** check box.
    2. To specify how often the signatures are verified, in the **Verification interval** boxes, select the number and time unit and then click **OK**.
9. Click **OK**.

Create a document type for unmatched images

When automatic form identification cannot match a captured image to one of your master forms, it assigns the proposed default document type to the document. To create a document type for unmatched images, complete the following steps.

This assignment allows you to easily find any documents in a batch that require additional processing after the automatic form identification stage is complete. Although you can use a previously defined document type, by creating a unique document type, you can more easily detect and handle documents that were not matched to master forms.

1. In **Management Console**, in the left pane, under **Select Department**, select a department from the list.
2. On the **Document Types** tab, click **New**.
3. Name the document type using a name such as `NoMatchFound`, which clearly marks the document type as having no form match, and press `ENTER`.

Next Select this document type as the default when you create the capture profile for automatic form identification.

Modify a document type

To modify a document type, complete the following steps.

1. In **Management Console**, in the left pane, under **Select Department**, select a department from the list.
2. In the left pane, click **Document Types**.
3. In the right pane, on the **Document Types** tab, select the document type and click **Modify**.

4. Modify any of the following document type components:

Situation	Steps
Enable or disable the document type	• On the **General** tab, select the **Is Active** check box to make the document type active or clear the check box to make the document type inactive.
Select a form for the document type	• On the **General** tab, select the **Is a form** check box and in the **Form** list, select a form.
Modify the document type description	• On the **General** tab, in the **Description** box, change the description as needed.
Modify the custom properties	1. Click the **Custom Properties** tab. 2. To add a custom property, in the **Available** list, select a custom property and click **Add**. In the confirmation box, click **Yes**. 3. To make the custom property required, in the **Added** list, click the first column of a custom property to add the icon. Or, click the icon to remove the requirement. 4. To change the order of a custom property, in **Added**, click **Move Up** or **Move Down**. 5. To remove a custom property from the list, in **Added**, select a custom property and then click**Remove**. In the confirmation box, click **Yes**.
Automatically verify signatures for the document type	On the **Digital Signatures** tab, select the **Automatically verify signatures for this document type** check box, and designate an interval.

5. Click **OK**.

Display a document as a form

This procedure changes all documents in the document type you select. To display a form instead of a document in ImageNowViewer, complete the following steps.

1. In **Management Console**, in the left pane, click **Document Types**.
2. Select the document type that contains the document you want and then click **Modify**.

3. In the **Document Type** dialog box, on the **General** tab, select the **Is a form** check box and then, in the **Form** list, select the form you want.
4. If you want the document type to be displayed to users, select the **Is active** check box.
5. Click **OK**.

Result Displaying a document as a form replaces any forms previously attached to any workflow queue with the form you select in this procedure.

Delete a document type

If there is at least one document that uses the document type, you cannot remove it. Instead, you can make the document type inactive so that it can no longer be assigned to documents. To delete a document type, complete the following steps.

1. In **Management Console**, in the left pane, under **Select Department**, select a department from the list.
2. In the left pane, click **Document Types**.
3. In the right pane, on the **Document Types** tab, select the document type and click **Delete**.
4. In the confirmation box, click **Yes**.

Rename a document type

To rename a document type, complete the following steps.

1. In **Management Console**, in the left pane, under **Select Department**, select a department from the list.
2. In the left pane, click **Document Types**.
3. In the right pane, on the **Document Types** tab, select the document type, and then click **Rename**.
4. In the selected row under **Document Type**, type a new name for the document type, and then press `ENTER`.

Result When you rename a document, the new document type name is automatically updated for all existing documents of that type.

Assign a document type to a folder type

To associate an existing document type with a folder type, complete the following steps.

Prerequisite Before you begin this procedure, ensure that your folder type and document types exist.

1. In **Management Console**, in the left pane, under **Select Department**, select a department from the list.
2. In the left pane, click **Folder Types**.
3. In the right pane, on the **Folder Types** tab, select the folder type to which you want to add a document type and click **Modify**.
4. In the **Folder Type** dialog box, on the **Document Types** tab, perform the following substeps.
    1. Optional. To prevent users from adding types of documents to a folder that you do not specify, select the **Allow only allows selected document types** check box.

2. Optional. To filter the available document types according to the list in which they were assigned, in **By List**, select a document type list.
3. In the **Available** list, select a document type and click **Add**.
4. Optional. To make a document type required, in the **Selected** list, click in the document type. **Required document type** icon.

   > **Note:** When you define required document types for a folder type, you can configure Perceptive Content workflow to consider a folder complete only when all required document types are added to the folder.

5. Optional. To change the order in which the document types appear in a folder, in the **Selected** list, select a document type and click **Move Up** or **Move Down**.

   > **Note:** You can also order the document types in the **View Preview** window on the **Appearance** tab.

6. Optional. To remove a document type from the folder type, select the document type and click **Remove**.
7. Click **OK**.

Require document types for a folder type

You can associate specific document types with folder types. To specify required document types, complete the following steps.

1. In **Management Console**, in the left pane, under **Select Department**, select a department from the list.
2. In the left pane, click **Folder Types**.
3. In the right pane, on the **Folder Types** tab, select the folder type and click **Modify**.
4. In the **Folder Type** dialog box, on the **Document Types** tab, in the **Selected** list, click in the column in front of the document type.

   The **Required** icon appears.
5. Click **OK**.

Definable document properties

Perceptive Content uses document properties to store, secure, and retrieve a document. Many document properties exist and you can define a set of these properties to customize your Perceptive Content system for your organization's business needs. The following information focuses on the set of document properties you can define.

To make a document distinguishable from other documents, you must define the Type property. In addition, you must define a unique name and location (a name along with a folder) or a unique set of document keys (Drawer along with Field1, Field2, Field3, Field4, or Field5). You define how properties are assigned to a document, as well as the type of information that can be assigned, in an application plan or a capture profile. The following tables further explain the definable document properties and provide an example value for each property.

Properties for a document not stored in a folder

For a document that is not stored in a folder, the Drawer and Type properties are required. You must also define one of the following properties: Field1, Field2, Field3, Field4, or Field5. Additional definable properties include custom properties and notes. The following table shows how you might define document properties for documents owned by the Human Resources Department that are not stored in folders.

Document Property	Description	Example Configuration	Example Value	Required
Drawer	Drawer provides the highest level within the document key structure and is often defined as a department or function, such as Accounts Payable, Human Resources, Registrar, or Financial Aid. You can restrict access to documents based on their assigned Drawer values.	Human Resources	Human Resources	Yes
Field1	You can use Field1 through Field5 to define values through a selected data element in your application plan dictionary, a literal value that you enter, the name of the current user, the date and time, a number in a sequence, or a unique ID assigned by Perceptive Content.	Employee ID	12345	Yes - You must define at least one field value.

Document Property	Description	Example Configuration	Example Value	Required
Field2	You can use Field1 through Field5 to define values through a selected data element in your application plan dictionary, a literal value that you enter, the name of the current user, the date and time, a number in a sequence, or a unique ID assigned by Perceptive Content.	Last Name	Jones	Yes - You must define at least one field value.
Field3	You can use Field1 through Field5 to define values through a selected data element in your application plan dictionary, a literal value that you enter, the name of the current user, the date and time, a number in a sequence, or a unique ID assigned by Perceptive Content.	First Name	John	Yes - You must define at least one field value.
Field4	You can use Field1 through Field5 to define values through a	Job Code	32156	Yes - You must define at least one field value.

Document Property	Description	Example Configuration	Example Value	Required
	selected data element in your application plan dictionary, a literal value that you enter, the name of the current user, the date and time, a number in a sequence, or a unique ID assigned by Perceptive Content.			
Field5	You can use Field1 through Field5 to define values through a selected data element in your application plan dictionary, a literal value that you enter, the name of the current user, the date and time, a number in a sequence, or a unique ID assigned by Perceptive Content.	Employment Status	Full Time	Yes - You must define at least one field value.
Type	Type categorizes a document so that your users can easily identify its purpose. A user selects a value for the Type field using a list of document type	Employment Application	Employment Application	Yes

Document Property	Description	Example Configuration	Example Value	Required
	values that you predefine. You can restrict access to documents based on the Type values assigned to them.			
Custom Properties	You can define custom property values for a document type. Custom properties let you define and store unlimited data beyond the standard document properties.	Job Title	Marketing Director	No
Notes	The Notes field enables a user to type and view additional text about a document.	Notes	Samantha Smith at Acme Corporation called September 9 to verify employment dates.	No

Properties for a document stored in a content model

When a document is stored in a content model, Perceptive Content stores the document in a folder that resides in a drawer. Many folder levels can exist within a folder. For a document that is stored in a content model, Perceptive Content uses the Type property as well as the document path to store, secure, and retrieve the document. The properties that make up the path, as well as Type, are required. You can store additional information about a document in the following definable properties: Field1, Field2, Field3, Field4, Field5, notes, and custom properties.The folders in which a user attempts to store a document, as well as the Type a user assigns to a document, must work with the folder type hierarchy that you define for a drawer. The following table shows how you might define document properties for documents owned by the Human Resources Department that are stored in a content model.

Document Property	Description	Example Configuration	Example Value	Required
Path	A document path indicates where a document is stored in your Perceptive Content system. The path contains the values assigned to the Drawer and Name property fields. The path also contains any folder or folders in which the document is stored. Each document path is unique.	The following structure applies to the document path: <Drawer> \ <folder> \ <subfolder> \ <Name>	Human Resources \ John Jones \ Onboarding \ Application	Yes
Name	Name provides a unique identifier for the document within the folder it is stored. A name cannot exceed 128 characters.	Application	Application	Yes
Drawer	Drawer provides the highest level within the folder structure and is often defined as a department or function, such as Accounts Payable, Human Resources, Registrar, or Financial Aid. You can restrict access to documents based on their assigned Drawer values.	Human Resources	Human Resources	Yes

Document Property	Description	Example Configuration	Example Value	Required
Type	Type categorizes a document so that your users can easily identify its purpose. A user selects a value for the Type field using a list of document type values that you predefine. You can restrict access to documents based on the Type values assigned to them.	Employment Application	Employment Application	Yes
Field1	You can use Field1 through Field5 to define values through a selected data element in your application plan dictionary, a literal value that you enter, the name of the current user, the date and time, a number in a sequence, or a unique ID assigned by Perceptive Content.	Employe ID	12345	No
Field2	You can use Field1 through Field5 to define values through a selected data element in your application plan dictionary, a literal	Last Name	Jones	No

Document Property	Description	Example Configuration	Example Value	Required
	value that you enter, the name of the current user, the date and time, a number in a sequence, or a unique ID assigned by Perceptive Content.			
Field3	You can use Field1 through Field5 to define values through a selected data element in your application plan dictionary, a literal value that you enter, the name of the current user, the date and time, a number in a sequence, or a unique ID assigned by Perceptive Content.	First Name	John	No
Field4	You can use Field1 through Field5 to define values through a selected data element in your application plan dictionary, a literal value that you enter, the name of the current user, the date and time, a number in a	Employment Status	Full Time	No

Document Property	Description	Example Configuration	Example Value	Required
	sequence, or a unique ID assigned by Perceptive Content.			
Field5	You can use Field1 through Field5 to define values through a selected data element in your application plan dictionary, a literal value that you enter, the name of the current user, the date and time, a number in a sequence, or a unique ID assigned by Perceptive Content.	Job Code	32156	No
Custom Properties	You can define custom property values for a specific document type. Custom properties let you define and store unlimited data beyond the standard definable document properties.	Job Title	Marketing Director	No
Notes	The Notes field enables a user to type and view additional text about a document.	Notes	Samantha Smith at Acme Corporation called September 9 to verify employment dates.	No

Document Type Lists

What are document type lists?

Document type lists group sets of document types together in order to build groups of document types that are specific to one department, process, or set of business rules.

Document type lists let you provide users with a filtered view or subset of the entire list of defined document types. For example, you can map a document type list to a LearnMode application plan to filter the available document types to assist the user in determining the correct document types to assign to documents. You can set the order of the documents in the list, and a document type can be included in multiple document type lists.

You can assign users or groups with Document, Explorer/Folder Viewer, Viewer, and Document Management privileges by each document type but not document type list. These action privileges apply at the same level as Drawer privileges, so you can assign privileges by drawer or document type.

Create a document type list

To create a document type list, complete the following steps.

1. In **Management Console**, in the left pane, under **Select Department**, select a department from the list.
2. In the left pane, click **Document types**.
3. In the right pane, on the **Document Types Lists** tab, click **New**.
4. In the selected row under **Document Type** List, type a name for the list.
5. Select the new document type list and click **Modify**.
6. On the **General** tab, type a name and optional description.
7. To add document types to the list, on the **List Members** tab, perform the following substeps:
    1. In the **Types** list, select a document type and click **Add**.
    2. Optional. To reorder the document types in the list, in the Members **List** box, select a document type and click **Move Up** or **Move Down**.

       Example You can move the most commonly used document types to the top of the list.
8. Click **OK** and, in the confirmation box, click **Yes**.

Modify or rename a document type list

To modify the components of a document type list, complete the following steps.

1. In **Management Console**, in the left pane, under **Select Department**, select a department from the list.
2. In the left pane, click **Document Types**.
3. In the right pane, on the **Document Type Lists** tab, select the list you want, and then click **Modify**.

4. Modify any of the following document type list components:

Situation	Steps
Rename the list	1. On the **General** tab, in the **Name** box, modify the name as needed. 2. In the **Description** box, describe the document type list.
Add, reorder, or remove document types	1. Click the **List Members** tab. 2. In the **Types** list, select a document type and click **Add**. 3. In the confirmation box, click **Yes**. 4. Click **Move Up** or **Move Down** to change the order.

5. Click **OK**. In the confirmation box, click **Yes**.

Delete a document type list

To delete a document type list, complete the following steps.

1. In **Management Console**, in the left pane, under **Select Department**, select a department from the list.
2. In the left pane, click **Document Types**.
3. In the right pane, on the **Document Type Lists** tab, select the document type list you want, and then click **Delete**.
4. In the confirmation box, click **Yes**.

Categories

What are categories?

Categories enable you to logically organize document types in Perceptive Content and Interact Desktop.

The Navigation pane displays categories under the list of available folders. Documents not assigned to a folder or a category are grouped together.

In Interact Desktop, you can create a category of document types in Management Console. When you create a category, you can assign a specific color to that category. In addition to defining a color, you can organize the document types within a category so that they appear in the order that your users want to see them. In the Navigation pane, Interact Desktop displays the name and color of each category, as well as a number that indicates the number of documents assigned to a category based on the current context. The Navigation pane only displays categories with documents assigned to them. When you create a category to display in Interact Desktop, Perceptive Content displays the category as a document type list in ImageNow Client.

Create a category for document types

To create a category for document types, complete the following steps.

1. In **Management Console**, in the left pane, under **Select Department**, select a department from the list.
2. In the left pane, click **Document Types**.
3. In the right pane, on the **Categories** tab, click **New**.
4. In the **Modify Category** dialog box, on the **General** tab, perform the following substeps.
    1. In the **Name** box, type a category name.
    2. Optional. In the **Description** box, describe the category.
5. On the **Members** tab, to add the document types that appear in this category, perform the following substeps.
    1. To assign only document types that appear in a specific document list, in the **By document type** list, select a list. If you select All document types, all of the document types in the system appear.
    2. In the **Types** list, select a document type and click **Add**.
    3. Optional. To change the order of the document types, in **Members**, click **Move Up** or **Move Down**.
6. Click **OK**.
7. Optional. To assign a color to the category, in **Management Console**, on the **Categories** tab, select the category and select a color.

Assign a category color

To assign a color to a category, complete the following steps.

1. In **Management Console**, in the left pane, under **Select Department**, select a department from the list.
2. In the left pane, click **Document Types**.
3. In the right pane, on the **Categories** tab, select a category and select a color.

Assign a document type to a category

To assign a document type to a category, complete the following steps. You can assign a document type to multiple categories.

Prerequisite Before you begin this procedure, ensure that your document types and document type lists are created.

1. In **Management Console**, in the left pane, under **Select Department**, select a department from the list.
2. In the left pane, click **Document Types**.
3. In the right pane, on the **Categories** tab, select the category to which you want to add a document type and click **Modify**.

4. In the **Category** dialog box, on the **Members** tab, perform the following substeps.
    1. Optional. To filter the available document types according to the list in which they were assigned, in **By document type list**, select a document type list.
    2. In the **Types** list, select a document type and click **Add.**
    3. Optional. To change the order in which the document types appear in a category, in the document type **List** , select a document type and click **Move Up** or **Move Down**.
    4. Optional. To remove a document type from the category, select the document type and click **Remove**.
    5. Click **OK**.

Modify a category

To modify an existing category, complete the following steps.

1. In **Management Console**, in the left pane, under **Select Department**, select a department from the list.
2. In the left pane, click **Document Types**.
3. In the right pane, on the **Categories** tab, in the category list, select the category you want to update and click **Modify**.
4. In the **Category** dialog box, on the **General** tab, perform one or more of the following actions.
    - In the **Name** box, modify the name as needed.
    - In the **Description** box, modify the category description.
5. On the **Members** tab, perform one or more of the following actions.
    - To add an additional document type to the category, in the **By document type** list, select a list and in the **Types** list, select a document type, and then click **Add**.
    - To remove a document type from the category, in the **Members** list, select the document type and select **Remove**.
    - To change the order in which the document types appear in the category, in **Members**, select a document type and click **Move Up** or **Move Down**.
6. Click **OK** and in the confirmation box, click **Yes**.

Delete a category

To remove a category from the Perceptive Content system, complete the following steps.

1. In **Management Console**, in the left pane, under **Select Department**, select a department from the list.
2. In the left pane, click **Document Types**.
3. In the right pane, on the **Categories** tab, select the category you want to remove from **Perceptive Content** and click **Delete**.
4. In the confirmation dialog box, click **Yes**.

Rename a category

To rename an existing category, complete the following steps.

1. In **Management Console**, in the left pane, under **Select Department**, select a department from the list.
2. In the left pane, click **Document Types**.
3. In the right pane, on the **Categories** tab, select the category you want to rename and click **Modify**.
4. In the **Category** dialog box, on the **General** tab, in the **Name** box, enter a new name.
5. In the confirmation box, click **Yes**.

Reorder a category

To rearrange the order in which categories appear within a parent category, complete the following steps.

1. In **Management Console**, in the left pane, under **Select Department**, select a department from the list.
2. In the left pane, click **Document Types**.
3. In the right pane, on the **Categories** tab, select the category you want to move and click **Move Up** or **Move Down**.
4. Click **OK**.

Reorder category document types

To rearrange the order in which document types appear in a category, complete the following steps.

1. In **Management Console**, in the left pane, under **Select Department**, select a department from the list.
2. In the left pane, click **Document Types**.
3. In the right pane, on the **Categories** tab, select the category you want and click **Modify**.
4. In the **Category** dialog box, on the **Members** tab, select the document type you want to move and click **Move Up** or **Move Down**.

Organize your content structure

What are folder types?

What are folder types?

A folder type provides a template from which your users create and tailor individual folders.

In a folder type, you can assign one or more document types, custom properties, or capture profiles, as well as define how Perceptive Content displays the contents. You can specify that a folder type can only contain the document types you assign to it, and Perceptive Content prevents the user from adding documents to a folder that are not assigned to that folder. You can specify that the folder type contains some or all document types, and define your Perceptive Content workflow process to identify when a new folder type contains all of the required document types.

Perceptive Content provides the ability to specify that some or all document types assigned to a folder type are required. When you define required document types for a folder type, your users can view a list of the required document types in the Folder Viewer. You can also configure your Perceptive Content workflow process to identify when a folder contains all of the required document types.

You can also assign an unlimited number of "custom properties" to document types and folder types, enabling you to store additional metadata about a type. Additionally, you can organize folder types in your Perceptive Content system using "folder type lists" and the "folder hierarchy."

> For example, you might create a folder type named HR that users in your human resources department use each time they need to create a folder for a new employee. You might specify that the HR folder must contain "Resume," "Application" and "Tax form" document types, but not a "Medical" document type. Then you define workflow to route the documents in a new employee's folder only after the resume, application and tax form arrive in the specified queue. In the event that a user tries moving and insurance form into this folder, Perceptive Content prevents it.

Create a folder type

To create a folder type, complete the following steps.

1. In **Management Console**, in the left pane, under **Select Department**, select a department from the list.
2. In the left pane, click **Folder Types**.
3. On the **Folder Types** tab, click **New** and type a name for your folder type.
4. Select the folder type and click **Modify**.
5. On the **General** tab, in the **Description** box, type a description explaining briefly how this folder type is used.
6. Click **OK**.

Modify a folder type

To modify a folder type, complete the following steps.

1. In **Management Console**, in the left pane, under **Select Department**, select a department from the list.
2. In the left pane, click **Folder Types**.
3. Select a folder name and click **Modify**.
4. In the **Folder Type** dialog box, make the modifications you want to the options available, such as, to change or remove the folder's name, description, or assigned document type members, custom properties, and forms.
5. Click **OK**.

Rename a folder type

To rename a folder type, complete the following steps.

1. In **Management Console**, in the left pane, under **Select Department**, select a department from the list.
2. In the left pane, click **Folder Types**.
3. Select the folder type you want to rename and click **Rename**.
4. Type the new name for the folder type.
5. Click **OK**.

Delete a folder type

To delete a folder type, complete the following steps.

You cannot remove a folder type if folders based on the folder type exist in your Perceptive Content system. Set a folder type to inactive when you want to retain the existing folders, but you no longer want users to create folders based on the folder type. If you want to prevent users from using the folder type temporarily, revoke the user privileges for that period of time.

1. In **Management Console**, in the left pane, under **Select Department**, select a department from the list.
2. In the left pane, click **Folder Types**.
3. Select the folder you want to delete and click **Remove**.
4. Click **OK**.

Display a folder as a form

To display a form in Folder Viewer instead of the folder contents, complete the following steps.

1. In **Management Console**, in the left pane, under **Select Department**, select a department from the list.
2. In the left pane, click **Folder Types**.
3. Select the folder type that contains the folder you want to change and then click **Modify**.

Note: This procedure changes all folders with the folder type you select.

4. In the **Folder Type** dialog box, on the **General** tab, select the **Is a form** check box and, in the **Form** list, select the form you want.
5. To display the folder type to users, select the **Is active** check box.

Note: Displaying a folder as a form replaces any forms previously attached to any workflow queue with the form you select in this procedure.

6. Click **OK**.

Assign a capture profile to a folder type

You assign a capture profile to a folder type when your users add files to Perceptive Content using Interact for Outlook. When a user adds a file to a folder in Outlook, the associated capture profile defines how the file is indexed. To assign a capture profile to a folder, complete the following steps.

1. In **Management Console**, in the left pane, under **Select Department**, select a department from the list.
2. In the left pane, click **Folder Types**.
3. In the right pane, on the **Folder Types** tab, select the folder type to which you want to assign a capture profile and click **Modify**.
4. In the **Folder Type** dialog box, on the **Capture Profiles** tab, perform the following substeps.
    1. In the **Available** list, select a capture profile and click **Add**.
    2. Optional. To remove a capture profile from the folder type, select the profile and click **Remove**.
    3. Click **OK**.

Create a folder hierarchy for output files

To create a nested folder structure where each folder represents an item s keys or properties, complete the following steps.

If you are exporting items to a file, you can only perform this procedure if you are not outputting files as a single PDF.

1. Perform one of the following options, depending on the situation.

Situation	Steps
Define folder structure in **Management Console**	1. In **Management Console**, in the left pane, click **Output Profiles**. 2. In the right pane, click the **File** tab, select the output profile, and click **Modify**.

Situation	Steps
Define folder structure in the viewer	1. Open the item. 2. Click **File > Export**. 3. In the **Export** dialog box, click **Options**.

2. On the **Folder Hierarchy** tab, perform one of the following options.

Situation	Steps
To create a copy of the existing folder structure	• Select the **Use the existing hierarchy for this item** check box.
To create a new folder structure	1. To select the item properties to create folders for the output files, click **Add**. 2. To change the order of the properties you added, click a property and click **Move Up** or **Move Down**. 3. To remove a property from the list, click **Remove**.

3. Click **OK**.

What is content modeling?

What is content modeling?

Content modeling is the process by which you structure, manage, and preserve content in Perceptive Content to best fit your business needs. A content model includes secure methods for capturing, processing, and searching for content.

Because different business processes use different content, each content model structures, manages, and preserves the content according to each business process.

Modeling your content in Perceptive Content involves creating drawers, items, and container types; building a container type hierarchy within drawers; using the defined container and item types; and assigning uniquely identifiable properties to content, including custom properties.

Perceptive Content enables you to define specific item types as required for a container. When you define required item types for a container, your users can view a list of the required item types in a container viewer. You can also configure your Perceptive Content workflow process to identify when a container contains all of the required item types.

Perceptive Content enables you to create a container type hierarchy to restrict the types of containers allowed in a drawer. You can also restrict drawers and container types to allow only specified item types.

For example, when you restrict a drawer to allow only specified item types, a user can add an item to the drawer only if the item is assigned one of the item types that you specify.

Define a content model overview

Many components perform roles in a content model. Before you define a content model for a drawer, you must create the necessary document types, folder types, and drawer. You must also define content model-specific privileges. The additional components that you create to complete a content model depend on your business processes. We recommend that you create the components in the listed order by completing the following sequence of procedures.

1. Add the custom properties needed to store additional data about a document or folder based on its assigned Type value.
   - Create a custom property overview
2. Adda document type to provide a template to define which users can access the document based on its Type value and which custom property values a user can assign to the document.
3. Create a document type list to provide a filtered set of document types.
4. Createa drawer in which to store content.
   - Manage drawer restrictions overview
5. Create a folder type list to provide a filtered set of folder types.
6. Define a folder type hierarchy for a drawer to specify which folders a user can store in a drawer.
7. Set folder privileges to specify which drawers, folders, and document types a user or group of users can access, as well as which actions the user or group can perform.
8. Create an application plan to contain mapped information used to assign a location and property values to documents, folders, and shortcuts.
   - Create an application plan
9. Create a client-based capture profile to contains the settings used to capture documents, including how to assign the location and property values to a new document.

What are folder type lists?

A folder type list enables you to group sets of folder types based on a relationship.

Folder type lists also let you provide users with a filtered view, or subset, of the entire list of defined folder types. You can set the order of the folders in the list so that the commonly used folder types appear near the top of the list.

For example, you can build groups of folder types specific to one department, process, or set of business rules.

Create a folder type list

To group existing folder types into a folder type list, complete the following steps.

1. In **Management Console**, in the left pane, under **Select Department**, select a department from the

list.

2. In the left pane, click **Folder Types**.
3. In the right pane, on the **Folder Types Lists** tab, click **New**.
4. Under **Select a folder type list**, in the selected row, type a name for the list.
5. Select the new folder type list and click **Modify**.
6. Optional. In the **Folder Type List** dialog box, on the **General** tab, modify the name or optional description.
7. In the **Folder Type List** dialog box, on the **List Members** tab, perform the following substeps:
   1. To add a folder type, in the **Types** list, select a folder type and click **Add**. Repeat this step for each folder type that you want to add to the list.
   2. Optional. To change the position of a folder type in the list, in the **Members** list, select a folder type and click **Move Up** or **Move Down**.
   3. Click **OK**.
8. In the confirmation box, click **Yes**.

Modify or rename a folder type list

To modify a folder type list by changing its name, description, or folder type list members, complete the following steps.

1. In **Management Console**, in the left pane, under **Select Department**, select a department from the list.
2. In the left pane, click **Folder Types**.
3. In the right pane, on the **Folder Type Lists** tab, select the list you want to modify and click **Modify**.
4. In the **Folder Type List** dialog box, modify any of the following components:

Situation	**Steps**
Rename the list or modify its description	1. Click the **General** tab. 2. In the **Name** box, modify the name. 3. In the **Description** box, modify the description.
Add, reorder, or remove folder types in the list	1. Click the **List Members** tab. 2. To add a folder type to the list, in the **Types** list, select a folder type and click **Add**. 3. To change the position of a folder type in the list, in the **Members** list, select a folder type and click **Move Up** or **Move Down**. 4. To remove a folder type from the list, in the **Members** list, select the folder type list and click **Remove**.

5. Click **OK**.
6. In the confirmation box, click **Yes**.

Delete a folder type list

To delete a folder type list, complete the following steps.

1. In **Management Console**, in the left pane, under **Select Department**, select a department from the list.
2. In the left pane, click **Folder Types**.
3. In the right pane, on the **Folder Type Lists** tab, select the folder type list and click **Delete**.
4. In the confirmation box, click **Yes**.

What is the folder type hierarchy?

The folder type hierarchy allows you to structure your container types in drawers.

You use the hierarchy to define a template for the container structures that your users create to perform their tasks. The folder type hierarchy is a component of a content model.

Perceptive Content does not require that you specify a container type hierarchy for your users to create containers in a drawer; however, we recommend that you establish a hierarchy so that the containers your users create in your system follow a defined structure. A well designed structure enhances the storage and retrieval of items.

Define a folder type hierarchy for a drawer

When you define a hierarchy for a drawer, the drawer becomes restricted so that a user can only add a folder to the drawer that is assigned one of the folder types specified in the drawer's folder type hierarchy. To define a folder type hierarchy for a drawer, complete the following steps.

1. In **Management Console**, in the left pane, under **Select Department**, select a department from the list.
2. In the left pane, click **Folder Types** and, in the right pane, click the **Hierarchy** tab.
3. In the right pane, under **Structure**, in the **Display** list, select the name of the drawer you want to restrict.
4. In the left pane, under **Folder Types**, perform the following substeps.
    1. Optional. For **By list**, select a folder type list to filter the list of folder types.
    2. From the list of folder types, select the folder type you want to define in the hierarchy and drag it to the right, dropping it under the drawer where you want it to appear.
    3. Continue to add folder types under the drawer's name and use the **Move Up** or **Move Down** buttons to arrange the folder types to fit your business needs.

    > **Note:** You can use the **Move Up** or **Move Down** buttons to move a folder type to a different location under a drawer, but you cannot use them to move a folder type from one drawer's hierarchy to another drawer's hierarchy.

4. If you define more than one level of folder types in the hierarchy, and you want to restrict the last folder type level so that a user cannot create a folder below this level, in the right pane, right-click the last folder type level and click **Restrict**.

5. To apply your changes to the hierarchy, click **Save**.

Modify a folder type hierarchy for a drawer

To modify a folder type hierarchy that was defined for a drawer, complete the following steps.

1. In **Management Console**, in the left pane, under **Select Department**, select a department from the list.
2. In the left pane, click **Folder Types** and, in the right pane, click the **Hierarchy** tab.
3. In the right pane, under **Structure**, in the **Display** list, select the name of the drawer you want to modify.
4. Perform any of the following actions to modify the drawer's hierarchy:
   - To add a folder type, from the list of folder types in the left pane, select the folder type you want to define in the hierarchy and drag it to the right, dropping it under the drawer where you want it to appear.
   - To relocate a folder type, select the folder type and click the **Move Up** or **Move Down** button.
   - To remove a folder type, select the folder type and click **Remove**.
   - To reset all changes you made to the hierarchy since the last save, click **Undo All**.
5. To apply your changes to the hierarchy, click **Save**.

Manage folder type restrictions overview

To restrict a folder type to allow only the specified document and subfolder types complete any of the following procedures.

1. Restrict document types in a folder.
2. Restrict subfolder types in a folder.
3. Remove folder contents restrictions.

Remove a folder type from the folder type hierarchy

To remove a folder type from the folder type hierarchy, but not remove the folder type from your system, complete the following procedure.

1. In **Management Console**, in the left pane, under **Select Department**, select a department from the list.
2. In the left pane, click **Folder Types**, and in the right pane, click the **Hierarchy** tab.
3. To remove a subfolder type from the **Common Hierarchy**, in the **Structure** pane, under **Common Hierarchy**, select the subfolder type you want to remove, and then click **Remove**.
4. To remove a folder type from the hierarchy defined for a drawer, In the **Structure** pane, in the **Display** list, select the name of the drawer from which you want to remove a folder type, select the folder type you want to remove, and then click **Remove**.
5. To apply your changes to the hierarchy, click **Save**.

What are drawers?

Drawers provide the first hierarchical level of organization for Perceptive Content documents, and they are used to separate documents and folders into logical categories.

You might think of drawers as individual departments. For example, the accounting department data can be stored separately from the sales department data by having separate "Accounting" and "Sales" drawers.

In addition to providing a distinct level of organization, you can use drawers to assign or deny access to particular documents and folders. For example, only users in the accounting department may need to see certain folder contents. These particular folders can be stored in a drawer named "Accounting." Access to that drawer can be restricted at the user or group level by assigning the appropriate privileges.

Create a drawer

To create a new drawer, complete the following steps.

You can restrict a drawer to only allow users to store specified document types at the drawer level. This restriction does not prevent a user from storing a document type in a folder within the drawer.

1. In **Management Console**, in the left pane, under **Select Department**, select a department from the list.
2. In the left pane, click **Drawers**.
3. In the right pane, click **New**.
4. In the **New Drawer** dialog box, on the **General** tab, type the drawer name and an optional description.
5. To restrict the drawer to allow only specified document types, on the **Document Types** tab, perform the following substeps.
    1. Select the **Allow only selected document types** check box.
    2. Optional. To filter the document types according to the list in which they were assigned, in the **By list**, select a document type list.
    3. Under **Available**, select a document type and click **Add**. Continue to add document types that you want to allow at the drawer level.
    4. To change the order in which the document types display in the drawer, in the **Selected** list, click **Move Up** or **Move Down**. For example, you can move the most commonly used document types to the top of the list.
    5. To delete a document type from the list, in the **Selected** list, select the document type you want to remove and click **Remove**.
    6. Click **OK**.
6. Optional. To have **Perceptive Content** verify digital signatures for this drawer, on the **Digital Signatures** tab, perform the following substeps.
    1. **Automatically verify signatures for this drawer** check box.
    2. For **Verification interval**, specify the number and time unit for how often you want **Perceptive Content** to verify the signatures.
7. Click **OK**.
8. Optional. To create a new drawer with the same privilege assignments as another drawer, use the

above steps but instead select the drawer you want to copy in step 2, then click **Copy** instead of **New**.

Note: This does NOT copy the documents in the existing drawer to the new drawer.

Manage drawer restrictions overview

To restrict a drawer to allow only specified folder types and document types, as well as steps to remove restrictions, complete any of the following procedures.

- Restrict document types for a drawer.
- Restrict folder types for a drawer.
- Remove drawer document type restrictions.
- Remove drawer folder restrictions.

Rename a drawer

To rename a drawer, complete the following steps.

1. In **Management Console**, in the left pane, under **Select Department**, select a department from the list.
2. In the left pane, click **Drawers**.
3. In the right pane, select the drawer you want to rename, and then click **Rename**.
4. Type the new drawer name and then press **ENTER**.

View details about a drawer

To view details about the document and folder types configured for a drawer, complete the following steps.

- Do one of the following actions, depending on the situation.

Situation	Steps
View the document types assigned to a drawer	1. In Management Console, in the left pane, click Drawers. 2. In the right pane, on the Drawers tab, select the drawer for which you want to view assigned document types and click modify. 3. In the Drawer dialogue box, on the Document Types tab, under Selected, Perceptive Contentdisplays a list of all document types assigned to the drawer. 4. Click OK.
View the folder types defined for a drawer	1. In Management Console, in the left pane, click Folder Types and, in the right pane, click the Hierarchy tab. 2. In the right pane, under Structure, in the Display list, select the name of the drawer for which you want to view its defined folder types.

Delete a drawer

To delete the drawer, complete the following steps.

Prerequisite To delete a drawer, you must first remove all documents, shortcuts, and folders from the drawer. When you remove a drawer, you do not delete the users and groups assigned to it.

1. In **Management Console**, in the left pane, under **Select Department**, select a department from the list.
2. In the left pane, click **Drawers**.
3. In the right pane, select the drawer you want to delete, and then click **Remove**.
4. In the confirmation dialog box, click**Yes**.

Manage Capture

What is CaptureNow?

The CaptureNow product suite drives the desktop, ImageNow Client-based collection and processing of documents from multiple sources with a rich collection of scanning and importing functionality.

Your users can collect files manually or automatically from a centralized location or distribute the capture of documents to different locations. Using CaptureNow, your users can capture all types of documents, individually or in batches, into a secure, organized, and accessible repository.

Capture and source profiles enable you to define hardware and software settings such as resolution, page size, orientation, brightness, threshold detection, and duplex scanning to optimize your unique capture environment. Your users can deliver captured documents directly into workflow processes where documents are automatically assigned document properties with features such as barcode recognition. Also, when CaptureNow is used with Recognition Agent, documents can be submitted for OCR processing. Quality Assurance features ensure images appear clean and readable before they are indexed and placed into the repository or a specified workflow queue.

Document property types in CaptureNow

You must define the type of information to store in a document property value that is assigned to a captured document. For Single or Batch mode, you set a document property type in a capture profile. For Package mode, you set a document property type in the Basket Definition dialog box while creating or editing a basket. The following list describes each type you can choose to define a document property.

Application

Assign a value captured from an application plan.

Barcode

Assign a value captured from one of the recognized barcodes. You must supply the number of the barcode in the Value field. You can parse a single barcode into separate values with the standard barcode parsing syntax `<barcode position number> | <starting character> - <ending character>`.

Batch Sequence

Assign the unique Batch Sequence number assigned to a batch of captured documents. The Batch Sequence number helps group pages of a captured batch of documents together.

COM Value

Assign a value gathered from your business application through a COM interface specified in the Value field. For Single and Batch modes, to allow a user to change the property value, select the Allow user updates to this value check box.

Date/Time

Assign the date and time that Perceptive Content captures the document.

Document Type

Assign a pre-defined document type selected from the Value list.

Document Type List

Select a pre-defined document type list from the Value list for a user to choose from when capturing the document.

Empty

Do not assign a value.

Imprinter Value

Assign a data string captured from imprinter hardware. Imprinter hardware connects to a scanner and prints a data string on the original scanned document.

Literal

Assign the static value entered in the Value field.

Notes

Assign a static value entered in the Value box. This text appears in the Notes field in the Properties pane when users view a document in Viewer.

OCR Zone

Assign a value gathered through OCR when the document is submitted to the server for Recognition Agent processing. Click the Settings button to configure the OCR zone on the document.

Predefined List Local

Create a list of values in the Value field for a user to choose from when Perceptive Content captures the document. Perceptive Content stores the list of values locally.

Predefined List Server

Create a list of values in the Value field for a user to choose from when Perceptive Content captures the document. Perceptive Content stores the list of values on the server.

Sequence Number

Assign a sequence number for Perceptive Content to retrieve a serial number from a sequence table or define your own sequence number. You can create a new group of numbers with varying widths and increments. For example, you can create a sequence called Sequence_indexkey1, where the width is 5 and the increment is 1. Perceptive Content would assign 00001 to the first document, 00002 to the second document, and so on.

System Drawer

Assign the name of a drawer.

Unique ID

Assign the Unique ID that Perceptive Content generates. Choose this type if you want to treat each page of a batch separately.

User Entry

Prompt the user who captures the document to enter a value.

User Name

Assign the name of the user who captured the document.

VB Script

Assign a value gathered from your business application through a VB Script entered in the Value field. After you enter a script, click Test to review the output.

Application Plans

About selecting an application plan type

Perceptive Content has different types and methods available to capture data from a business application and to create an application plan.

The first step to working with application plans is selecting the type and method that works best with your business environment. The application plan types are Agent, External, External User, Interact, LearnMode, Manual, and Mobile. The Agent type has two methods: Fax Agent and Import Agent. The Interact type has two methods: Connector for SAP ArchiveLink and Interact for Outlook. The LearnMode type has six methods: DOS command prompt, HyperLearn, Internet Explorer, Terminal Capture, Viewpoint, and Window Walker.

Finding the right type and method is sometimes a case of trial and error and involves finding the right method that fits the specific needs of your business. When using a business application, you need to understand how Perceptive Content captures data from the application, its design, and the property values you need to capture to link your images. It is extremely helpful to understand what type of business application you use, the type of interface it uses, and how it is accessed by your users.

Activate an application plan

An application plan assigns metadata to a captured item, which can be a document or a record, and allows users to easily filter and retrieve that item. The following steps describe how to activate an application plan.

1. In **Management Console**, in the left pane, under **Select Department**, select a department from the list.
2. Expand **Application Plans** and select an application plan type.
3. In the right pane, on the **Applications** tab, select the application you want to activate and click **Settings**.
4. In the **Plan Settings** dialog box, select**Is active**.
5. To close the **Plan Settings** dialog box, click **OK**.

Add a user or group to an application plan

Adding a user or group to an application plan allows those users to access and utilize it. To add a user or group to an application plan, complete the following steps.

1. In **Management Console**, in the left pane, under **Select Department**, select a department from the list.
2. Expand **Application Plans** and select an application plan type.
3. In the right pane, on the **Applications** tab, select the application to which you want to add a user or group and click **Settings**.
4. In the **Plan Settings** dialog box, on the **Security** tab, click **Add**.
5. Under **Privileges**, grant or deny the specific privilege actions.
   - To grant specific application plan privileges for the selected user or group, click the column in front of each privilege until  appears.
   - To deny specific application plan privileges for the selected user or group, click the column in front of each privilege until  appears.

   Note: You can grant or deny privileges to create or link documents, automatically create folders when the document is linked, run the active screen's view action and manage the application plan. Alternatively, you can click Allow All, Deny All, or Deselect All to allow, deny or deselect all privileges for the selected user or group.
6. Click **OK** to close the **Plan Settings** dialog box.

Copy an application plan

To copy an application plan, complete the following steps.

1. In **Management Console**, in the left pane, under **Select Department**, select a department from the list.
2. Expand **Application Plans** and select an application plan type.
3. In the right pane, on the **Applications** tab, select the application plan you want to copy.
4. Click **Copy**.
5. In the **Copy** dialog, enter a name and click **OK**.
6. To modify the copied version of the application plan, complete any of the following actions.
   - To assign a name to the copied application plan, click **Rename**, type the new name, and press `ENTER`.
   - To make changes to the application plan, such as modifying context maps or adding new screens or dictionary data elements, select the copied version and click **Modify**.
   - To make changes to the general settings of the application plan, such as changing the application plan name or description, or to make changes to the security settings, select the copied version and click **Settings**.

Create an application plan

To create an application plan, complete the following steps.

The Mobile application plan type does not support Records Manager functionality. To view records functionality, you must install a Records Manager license.

1. In **Management Console**, in the left pane, under **Select Department**, select a department from the list.
2. In the left pane, expand **Application Plans** and select an application plan type.
3. In the right pane, on the **Applications** tab, select **New**.
4. In the **Plan Settings** dialog box, select the **General** tab.
5. Under **Information**, complete the following substeps.
   1. For **Content Type**, select the **Document** or **Record** option. You cannot change the content type once the application plan is created.
   2. In the **Name** box, type a unique name for your application plan.
   3. Optional. In the **Description** box, type a description for your application plan.
   4. Optional. Clear the **Is active** check box if you do not want this application plan to be active.
6. Click **OK**.

Delete an application plan

To delete an application plan, complete the following steps.

1. In **Management Console**, in the left pane, under **Select Department**, select a department from the list.

2. Expand **Application Plans** and select an application plan type.
3. In the right pane, on the **Applications** tab, select the application plan you want to delete.
4. Click **Delete**.
5. In the confirmation dialog box, click **Yes**.

Modify an application plan

To modify an application plan, complete the following steps.

1. In **Management Console**, in the left pane, under **Select Department**, select a department from the list.
2. In the left pane, expand **Application Plans** and select an application plan type.
3. In the right pane, on the **Applications** tab, select the application plan you want to modify.
4. To modify an application plan, perform any of the following actions.

Situation	Steps
Modify an application plan	1. Click **Modify**. 2. In **Application Plan Designer**, make the necessary changes to the application plan, such as modifying maps, or adding new screens or dictionary data elements. If your application plan has more than one screen, you must modify each screen separately. 3. Click **Save** when you are finished modifying the application plan and close **Application Plan Designer**.
Modify application plan settings	1. Click **Settings**. 2. In the **Plan Settings** dialog box, make the necessary changes to the application plan's general settings, such as changing the application plan name and description, or updating security preferences. 3. Click **OK**.

Remove a user or group from an application plan

To remove a user or group from an application plan, complete the following steps.

1. In **Management Console**, in the left pane, under **Select Department**, select a department from the list.
2. Expand **Application Plans** and select an application plan type.
3. In the right pane, on the **Applications** tab, select the application from which you want to remove a user or group and click **Settings**.

4. In the **Plan Settings** dialog box, on the **Security** tab, select the appropriate user or group, and click **Remove**.
5. To close the **Plan Settings** dialog box, click **OK**.

Rename an application plan

To rename an application plan complete the following steps.

1. In **Management Console**, in the left pane, under **Select Department**, select a department from the list.
2. Expand **Application Plans** and select an application plan type.
3. In the right pane, on the **Applications** tab, select the application plan you want to rename.
4. Click **Rename**.
5. Type the new application plan name and press `ENTER`.

What is an application plan?

An application plan assigns metadata to a captured item, which can be a document or a record, and allows users to easily filter and retrieve that item.

Perceptive Content uses an application plan to assign drawer, folder, and document property values to a captured document. Perceptive Content also uses an application plan to assign file plan, category, folder, and record property values to a captured record.

These values store additional information about your items and allow users to easily filter and retrieve items stored in Perceptive Content.

What is a screen?

A screen represents a screen in your business application that is learned by applying one of the LearnMode methods, such as HyperLearn or ViewPoint.

When you create a screen, you capture data from the business application screen to create document keys. You can also add screens to an existing application plan, make changes to the way an existing screen links to the business application, delete a screen, and rename a screen.

In Perceptive Content, you can use Microsoft Visual Basic Scripting to identify specific screens of your business application when multiple screens are open. You can create, modify, and apply these scripts when adding or editing a screen.

Add a macro

A macro is a script you add to an application plan to define how Perceptive Content formats and processes data elements before the elements are added to the dictionary. To add a macro, complete any of the following procedure.

- Add an alphanumeric macro
- Add a concatenation macro
- Add a date conversion macro
- Add a delete characters macro
- Add a fixed length macro
- Add a line search macro
- Add a number format macro
- Add a split attribute at delimiter macro
- Add a static search macro
- Add a trim characters macro

Add an alphanumeric macro

To add a macro that handles alphanumeric characters for a dictionary field in an application plan, complete the following steps.

1. In the **Dictionary** pane, double-click the data field where you want to apply a macro.
2. In the **Dictionary Field** dialog box, under **Processing**, click **Add > Macro**.
3. In the **Select Macro** dialog box, select **Alpha numeric macro** and click **OK**.
4. In the **Alpha Numeric** dialog box, under **General**, select one of the following options from the **Alphanumeric Filter** list.
   - Select **Alphanumeric Characters Only** if you want the system to remove non-alphanumeric characters from the output string. These characters include all symbols and punctuations.
   - Select **Alpha Characters Only**if you want the system to remove non-alphabetic characters from the output string.
   - Select **Numeric Characters Only** if you want the system to remove non-numeric characters from the output string.
5. Click **OK** until you return to **Application Plan Designer**.

Add a concatenation macro

To add a macro that concatenates characters in a dictionary field for an application plan, complete the following steps.

1. In the **Dictionary** pane, double-click the data field where you want to apply a macro.
2. In the **Dictionary Field** dialog box, under **Processing**, click **Add > Macro**.
3. In the **Select Macro** dialog box, select **Concatenation** and then click **OK**.

4. In the **Concatenation** dialog box, under **General**, click the ellipsis [...] button in the **Concatenation Rule** field.
5. In the **Concatenation Rule Builder** dialog box, under **General**, double-click the dictionary data elements you want to join together.
6. Click **OK** until you return to **Application Plan Designer**.

Add a date conversion macro

To create a macro that converts values from your business application into a format that document, folder, and shortcut properties can accept, complete the following steps.

1. In the **Dictionary** pane, double-click the data field where you want to apply a macro.
2. In the **Dictionary Field** dialog box, under **Processing**, click **Add > Macro**.
3. In the **Select Macro** dialog box, select **Date Conversion**and click **OK**.
4. In the **Date Conversion** dialog box, under **General**, select the appropriate format from the **Format** list or enter a unique format.

   > **Note:** The date format you select or enter must match the date format of the data element linked to the selected dictionary item. If you want to assign a value to a date custom property, you need to select this macro option to convert the date from your business application into the format of year, month, and day.

5. Click **OK**.

Add a delete characters macro

To add a macro that deletes unnecessary characters from your business application values, complete the following steps.

1. In the **Dictionary** pane, double-click the data field where you want to apply a macro.
2. In the **Dictionary Field** dialog box, under **Processing**, click **Add > Macro**.
3. In the **Select Macro** dialog box, select **Delete Characters** and then click **OK**.
4. In the **Delete Characters** dialog box, under **General**, type the characters you want the system to remove in the **Delete Characters**box.
5. Click **OK**.

Add a fixed length macro

To add a macro that defines the number of characters a value from your business application can have, complete the following steps.

1. In the **Dictionary** pane, double-click the data field where you want to apply a macro.
2. In the **Dictionary Field** dialog box, under **Processing**, click **Add > Macro**.
3. In the **Select Macro**dialog box, select **Fixed Length** and then click **OK**.
4. In the **Fixed Lengths**dialog box, under **General**, perform the following substeps:

   1. From the **Length** list, enter the number of characters or digits you want the value to have.
   2. From the **Direction** list, select the direction from which you want the system to cut off the characters.
5. Click **OK**.

Add a line search macro

To create a macro that captures values from your business application based on a line on the screen, complete the following steps.

1. In the **Dictionary** pane, double-click the data field where you want to apply a macro.
2. In the **Dictionary Field** dialog box, under **Processing**, click **Add > Macro**.
3. In the **Select Macro** dialog box, select **Line Search** and then click **OK**.
4. In the **Line Search** dialog box, in the **Line Count** box, type the line from which you want the system to capture the data.
5. From the **Direction** list, select the direction from which you want the system to search.
6. In the**Start Character Position** box, type the number of the starting character position.
7. From the **Stop Method** list, do one of the following actions:
   - Select **End of Line** if you want the stop method to be determined by the end of a line.
   - Select **Character Length** if you want the stop method to be determined by a fixed number of characters and then enter the amount of characters in the **Length** box.
   - Select **Stopping Characters** if you want the stop method to be determined by a specific string of characters and then type those characters in the **Characters**box.

   Note: You may need to expand the **Stop Method** tree to view the **Length** and **Characters** boxes.

8. Click **OK**.

Add a number format macro

To add a macro that formats numeric values from your business application, complete the following steps.

1. In the **Dictionary** pane, double-click the data field where you want to apply a macro.
2. In the **Dictionary Field** dialog box, under **Processing**, click **Add > Macro**.
3. In the **Select Macro** dialog box, select **Number Format** and then click **OK**.
4. In the **Number Format** dialog box, under **General**, complete the following substeps.
   1. From the **Decimal** symbol, select the value you want to represent the decimal system.
   1. In the **Decimal places** box, enter the number of digits you want the system to display after the decimal place.
   2. Click **OK**.

Add a split at delimiter macro

To create a macro that defines the character that separates the values in a string in your business application, complete the following steps.

1. In the **Dictionary** pane, double-click the data field where you want to apply a macro.
2. In the **Dictionary Field** dialog box, under **Processing**, click **Add > Macro**.
3. In the **Select Macro**dialog box, select **Split at Delimiter** and then click **OK**.
4. In the **Split at Delimiter** dialog box, under **General**, complete the following substeps,
   1. In the **Delimiter** box, type a character that separates the values in a string that you want to search.

      The system captures the value between the character you specify to the next delimiter.
   2. In the **Position in string** box, type a number that indicates the location of the delimiter to the right of the value that you want to find in the string.

   Note: You can specify any delimiter character such as a space, carat, dash, underscore, or slash. You can also specify multiple characters separated by commas.
5. Click **OK**.

Add a static search macro

To add a macro that captures data to the right or left of the static string to the end or beginning of the line in a business application, complete the following steps.

1. In the **Dictionary** pane, double-click the data field where you want to apply a macro.
2. In the **Dictionary Field** dialog box, under **Processing**, click **Add > Macro**.
3. In the **Select Macro**dialog box, select **Static Search** and then click **OK**.
4. In the **Static Search** dialog box, in the **Anchor Text** box, type the value of the static string.

   The system captures data to the right or left of the static string to the end or beginning of the line.
5. From the **Line Offset** list, perform one of the following actions.
   - Select **Yes** if the line number of the static string value can change.
   - Select **No** if the line number of the static string does not change.

   Example The static string may move down a row if a header is added to the screen.
6. From the**Line Location**list, complete one of the following actions.
   - Select **Above Anchor** if you want the system to return the value of the line above the text you specified in the **Anchor Text**box.
   - Select **Below Anchor** if you want the system to return the value of the line below the text you specified in the **Anchor Text**box.
7. In the **Line Count** box, type the line from which you want the system to capture the data.
8. In the **Direction** list, select the direction you want the system to start its search.
9. From the**Stop Method** list, complete one of the following actions.

- Select **End of Line** if you want to end the system search at the end of the current line.
- Select **Character Length** to end the system search after a fixed number of characters from the starting position and enter the amount of characters in the **Length** box. Note You may need to expand the **Stop Method** tree to view the Length box.
- Select **Stopping Characters**to specify a stopping character or a group of stopping characters and type those characters in the **Characters** box. Note You may need to expand the Stop Method tree to view the **Characters** box.

Note: You may need to expand the **Stop Method** tree to view the **Length** and **Character** boxes.

10. Click **OK**.

Add a trim characters macro

To add a macro that trims characters from a string value in a business application, complete the following steps.

1. In the **Dictionary** pane, double-click the data field where you want to apply a macro.
2. In the **Dictionary Field** dialog box, under **Processing**, click **Add > Macro**.
3. In the **Select Macro** dialog box, select **Trim Characters** and then click **OK**.
4. In the**Trim Characters** dialog box, under **General**, complete the following substeps.
   1. In the **Line Number**box, type the line from which you want the system to capture the data.
   2. From the **Direction** list, select the direction from which you want the system to trim off the characters.
   3. In the **Trim Characters** box, enter the characters you want the system to trim.
5. Click **OK**.

Agent Type

About using the Agent type methods

You use the Agent type application plan with Import Agent and Fax Agent to capture data directly into Perceptive Content.

- Fax Agent. The Fax Agent enables you to capture incoming faxes directly into Perceptive Content by converting them into documents. This method uses data available from the Fax Agent to identify possible document property values. Fax-specific data includes the fax sender number, fax sender DID, and incoming fax channel.
- Import Agent. The Import Agent, installed with the ImageNow Server, handles all automated import routines on the server. This method uses data available from the Import Agent to identify possible item property values. Import specific data includes Import mode, Import file name, Import file location, Import index file line, and Import associated text file.

Create a Fax Agent application plan

To create a Fax Agent application plan, complete the following sequence of procedures.

1. Create an application plan.
2. Define Fax Agent dictionary values.
3. Optional. Add a macro.
4. Createanapplicationplan map.
5. Add a user or group to an application plan.

Create an Import Agent application plan

To create an Import Agent application plan, complete the following steps.

1. Create an application plan.
2. Define Import Agent dictionary values.
3. Optional. Add a macro.
4. Createanapplicationplan document map.
5. Add a user or group to an application plan.

External Type

About using the External type

You use the External type application plan with external Perceptive Content interfaces, such as iScript and Integration Server.

This type uses data available from the external interface to identify possible property values for items and containers. It also limits the property values you can use for input in the external interface.

Configure an External application plan

You use the External application plan to map data to items using iScript or another external Perceptive Content interface. To create an external type application plan, complete the following steps.

1. Create an application plan.
2. Add a data element to the dictionary.
3. Add a macro.
4. Createanapplicationplan map.
5. Add a user or group an application plan.

External User Type

About using the External User type

You use the External User application plan when capturing files or scanning images from an application that is utilizing Integration Server to connect with Perceptive Content, such as Perceptive Experience Content Capture.

When using an External User type plan, the user can enter some of the properties, and you can configure which fields the user is able to modify. You can also create dictionary data elements when using this type of application plan.

Configure an External User application plan

You use the External User application plan when capturing files or scanning images from an application that is utilizing Integration Server to connect with Perceptive Content. To configure an External User application plan, complete the following steps.

1. Create an application plan.
2. Add a data element to the dictionary.
3. Add a macro.
4. Create an application plan document map.
5. Add a user or group to an application plan.

Interact Type

About using the Interact type methods

You use the Interact type to integrate the management features of Perceptive Content with your existing SAP and Outlook applications.

The Interact type contains two methods, the Connector for SAP ArchiveLinkand Interact for Outlook. Linking items according to content guarantees long-term easy access to the items.

The following bullets describe each type.

- Connector for SAP ArchiveLink. This integration allows you to deliver secure, digital versions of paper and other electronic documents associated with SAP transactions. SAP ArchiveLink is a service integrated in the SAP Web Application Server for linking archived documents and the application documents entered in the SAP system.
- Interact for Outlook. This integration uses a capture profile to determine how to link single or multiple captured emails and add them to Interact for Outlook.

Create an Interact application plan

You use the Interact application plan to map data to items captured by an Interact client, such as Interact for Lexmark. To create an Interact application plan, complete the following steps.

1. In **Management Console**, in the left pane, under **Select Department**, select a department from the

list.

2. In the left pane, expand **Application Plans** and select **Interact**.
3. On the **Applications** tab, select **New**.
4. In the **Plan Settings** dialog box, select the **General** tab.
5. Under **Information**, complete the following steps.
    1. For **Content Type**, select the **Document** or **Record** option.

        Note: You cannot change the content type once the application plan is created.

LearnMode Type

Create a Learn Mode application plan

You use the LearnMode application plan to map data, gathered from one or more screens, to documents or records where each screen represents a learned screen or window in your business application. To create a LearnMode application plan, complete the following steps.

Prerequisite Start your business application, then open the window and active business object that you want Perceptive Content to learn.

1. In **Management Console**, in the left pane, under **Select Department**, select a department from the list.
2. In the left pane, expand **Application Plans**, and select **LearnMode**.
3. In the right pane, on the **Applications** tab, select **New**.
4. In the **Plan Settings** dialog box, select the **General** tab.
5. Under **Information**, complete the following substeps.
    1. Next to **Content Type**, select either **Document** or **Record**.

        Note: You cannot change the content type once the application plan is created.

    2. In the **Name** box, type a unique name for your application plan.
    3. Optional. In the **Description** box, type a description for your application plan.
    4. Clear the **Is active** check box if you do not want this application plan to be active.
6. Under **Application**, select the method you want to use to identify the business application.

    Note:

    - The methods used to identify your business application allow you to use wildcard symbols.
    - The window title in **LearnMode** is limited to 128 characters.
7. Click **OK**.

    Perceptive Content captures a screen shot of the business application window and displays it in **LearnModeApplication Plan Designer**.

Set HyperLearn settings

You use this LearnMode method for GUI applications that do not make themselves as accessible to Perceptive Content as others. To set HyperLearn settings, complete the following steps.

1. On the **Perceptive Content** toolbar, click **Settings > Options**.
2. In the **ImageNowOptions** dialog box, in the left pane, click **LearnMode**, and then perform any of the following optional actions:

Situation	Step
To set the delay time for screen captures	• In the **Delay** list, select the time.
To display an alert when Perceptive Content encounters an unknown character when reading a business application screen	• Select the **Display message when unknown characters are found** check box.
To restrict font templates to the local computer	• Select the **Use font templates from local machine only** check box.
To convert an unwanted color appearing in the document key or screen ID clip region	1. Select the **Enable color conversion** check box. 2. In the **Search for** box, specify the unwanted color. 3. In the **Replace** box, specify the color to convert to.
To allow dynamic relocation of the target area	1. Select the **Enable position offset for dynamic fields** check box. 2. Set pixel movement to shift the search area when a business application's fields shift. 3. In the **Shift Region up/down** box, specify the pixel movement up or down. 4. In the **Shift Region left/right** box, specify the pixel movement left or right.
To troubleshoot issues with application plans by providing screen capture output	1. Select the **Enable debug** check box. 2. To view the output on the screen, select **Screen**. 3. To produce an output file, select **File (hyperlearn.log)**.

Note: Enabling position offset for dynamic fields shifts the coordinates for all HyperLearn application

> plans and templates on the client computer. It is possible this setting can disable other templates. However, because the screen shifts the same direction on the same business application every time, this is normally not an issue.

3. Click **OK**.

What is the Internet Explorer method?

The Internet Explorer method is the LearnMode type method you use with web-based applications.

Business applications that are rendered through HTML, ActiveX, Java, Macromedia Flash, or some combination of these are easily integrated with Perceptive Content.

LearnMode using the Internet Explorer method utilizes an HTML parser that conducts browser interrogation to identify property values. Data is obtained automatically and dynamically from the web application running on your desktop. When capturing data from your business application, LearnMode delivers the unique controls to the application plan. These controls are used in the captured window to define document property values and the screen label.

What is the HyperLearn method?

The HyperLearn method is the LearnMode type method used with GUI applications that are not as accessible to Perceptive Content as others.

Some custom-built applications, for example, may not adhere to all current Windows interface standards, and can only deliver bitmapped data about a Windows screen. In this case, LearnMode using the HyperLearn method utilizes an on-screen character recognition process to gather data from the business application. Basically, the HyperLearn method takes a screen shot of the business application window, analyzes its content, and converts the screen characters into text.

In other methods, field data is gained from controls. HyperLearn instead intelligently interprets the characters presented within a defined region on the window, including the title bar. Properties are defined by drawing boxes around the content you want in the captured window.

Using this method requires that you know the specific window font information, type face, point size and formatting style, used by the business application. You may need to contact the original manufacturer or designer of the business application to obtain font information.

What is LearnMode?

LearnMode is a client-side, non-programmatic method of integrating your business application with Perceptive Content and learning screens or windows within that application.

The LearnMode type application plan offers six different methods to learn your business application, and the best method to use depends on the type of application you are using. Knowing whether your application is GUI-based, web-based, DOS-based, a terminal emulator, or other type of application will assist in determining the LearnMode method to use. Sometimes, it takes trying more than one LearnMode method to determine which one works best for your particular application.

Each application plan you create can use a different LearnMode method. A LearnMode application plan contains screens. Creating a screen involves capturing the data from your business application screen so that you can create properties to link the image to a business object in your application. There should be one screen in the application plan for each screen or window in your business application. For example, a General Banking System business application may have a Main screen, a Summary screen, and a Loan screen.

What is the Terminal Capture method?

The Terminal Capture method is the LearnMode type method you use with terminal emulator programs and mainframe programs.

This method uses a straightforward technique of copying the business application screen contents to the system clipboard. This method is most commonly used with Terminal Emulation programs. The terminal emulator displays data screens from a mainframe or online business application.

Depending on the terminal emulator that you use, the way it copies screen data to the clipboard varies. A connect string is needed for each screen that is created. The connect string provides LearnMode with a set of system level program calls that relate specifically to the terminal emulation program being used. Determining the connect string is one of the most difficult tasks in this method. The clipboard contents are then copied into the captured window in the screen. Document property values are defined by highlighting the text in the captured window. The screen label is defined the same way.

We recommend checking with Perceptive Software Product Support to ask if the connect strings have already been determined for the terminal emulator for another customer using the same program.

What is the Viewpoint method?

The Viewpoint method is the LearnMode type method that is a hybrid between the Window Walker and HyperLearn methods and is used with some GUI applications on the Windows platform.

It is similar to Window Walker in that it is control-based. However, instead of using address of node in the control tree to identify and locate data, Viewpoint (formerly known as Window Text) uses x,y coordinates (similar to HyperLearn) to locate a control. The controls can be in a disabled state and the window can be dragged off the screen. Property values are defined by clicking the pointer in each text box in the captured window. This method also usually defines the screen label for you by collecting the text in the title bar of the captured window.

Perceptive Content includes an enhancement to LearnMode using the Viewpoint method to expand options for learning web-based applications that were built with tools such as Macromedia Flash and for use by Mozilla Firefox users.

What is the Window Walker method?

The Window Walker method is the LearnMode type method you use with some GUI applications that conform to Microsoft Windows interface design guidelines.

Many applications in use today have a graphical user interface that operates entirely within a single window on the desktop. Examples of applications that run inside a single window are Microsoft Word and Microsoft Excel. Custom-built applications also may fall into this category. Additionally, Window Walker can learn some Java applets and applications that run in browsers.

These application windows are published to the operating system in such a way that LearnMode can easily communicate with them using the Window Walker method. Different information is contained within easily distinguishable controls, such as fields, images, and objects. Data is obtained automatically and dynamically from the Windows application running on your desktop. When capturing data from your business application, Window Walker method it delivers the unique control IDs to the application plan for defining property values and the screen label.

Manual Type

About using the Manual type

You use the Manual type application plan as a stand-alone system, or when a business application is not available.

When using a Manual type application plan, some of the properties can be manually entered. This is different from the LearnMode application plan type where the properties are defined dynamically using values from a captured screen in the business application. There are features available during property definition that can make manual entry less manual.

> For example, predefined lists applied to properties present the user with a list of choices when linking an image, and scripts can process entered data.

Create a manual application plan

You use the Manual application plan to map data to documents or records without using an agent, Interact client, or business application. To create a manual application plan, complete the following steps.

1. In **Management Console**, in the left pane, under **Select Department**, select a department from the list.
2. In the left pane, expand **Application Plans** and select **Manual**.
3. In the right pane, on the **Applications** tab, select **New**.
4. In the **Plan Settings** dialog box, select the **General** tab.
5. Under **Information**, complete the following substeps.
   1. Next to **Content Type**, select either **Document** or **Record**.

      > **Note:** You cannot change the content type once the application plan is created.

   2. In the **Name** box, type a unique name for your application plan.
   3. Optional. In the **Description** box, type a description for your application plan.
   4. Clear the **Is active** check box if you do not want this application plan to be active.
6. Click **OK**.

Visual Basic

About using Visual Basic scripts

In Perceptive Content, you can use Microsoft Visual Basic scripting as a tool to extend functionality.

When creating an application plan, you can create, modify, and apply Visual Basic scripts to a property, custom property, or dictionary data element.

> For example, if you have a dictionary element called Full Name with the value "Bruce Jones", you can create a script that reverses the first name and the last name to read "Jones, Bruce".

You can also create and apply a script to the Field1 property to remove all punctuation (that is, dashes) from a social security number. As a result, the Visual Basic script updates the social security number "123-45-6789" to the number "123456789."

When you add a script to an item or container property, the script runs prior to the context mapping. If you select the User Entry source option, however, Perceptive Content clears the script data from the property to allow for user entry of data.

Apply a Visual Basic script

A Visual Basic script defines how Perceptive Content formats and processes screen data elements before the elements are added to the dictionary, or when applied to a map value. To apply a Visual Basic script, complete the following steps.

- In the Screens pane, select the screen you want, and then do one of the following actions.
  - Apply a Visual Basic script to a dictionary dataelement
  - Apply a Visual Basic script to a map value

> Suppose you want to remove the dashes from the social security numbers you map using an application plan in your Human Resources department. To remove the dashes, you apply the following script:
>
> ```
> workingvalue = DeleteChars(workingvalue, "-")
> ```
>
> To test this script, in the Input box, type 123-45-6789 and click Test. If the script works properly, "123456789" appears in the Test box. When you apply a Visual Basic script, Perceptive Content runs that script each time a user invokes the application plan.

Create a Visual Basic script

In Perceptive Content, you can use Microsoft Visual Basic Scripting as a tool to extend functionality. To create a Visual Basic script, complete the following steps.

1. In **Application Plan Designer**, in the **Screens** pane, select the appropriate screen, and then do one of the following actions:

Situation	Steps
Create a Visual Basic script for a dictionary data element	1. In the **Dictionary** pane, double-click the dictionary data element for which you want to create a Visual Basic script. 2. In the **Dictionary Field** dialog box, under **Processing**, click **Add > Script**. 3. In the **Script** dialog box, click **Create**, and then type a new name for your script. 4. Select the script you just created and click **Modify**.
Create a Visual Basic script for a map value	1. In the right pane, click the **Map** tab and then double-click the value for which you want to create a Visual Basic script. 2. In the **Attributes** dialog box, under **Advanced**, from the **Scripts** list, select **Manage Scripts**. 3. In the **Script** dialog box, click **Create**, and then type a new name for your script. 4. Select the script you just created and click **Modify**.

2. In the **Script New Script** dialog box, create your Visual Basic script by typing the information in the text box under **Script**.
3. Under **Sample**, in the **Input** box, enter a value that allows you to test the script you just created.
4. Click **Test**, and verify **Perceptive Content** returns the appropriate value.
5. To close the **Script New Script** dialog box, click **OK**.
6. To close the **Scripts** dialog box, click **OK**.
7. To close the **Dictionary Field** dialog box or **Attributes** dialog box, click **OK**.

Modify a Visual Basic script

In Perceptive Content, you can use Microsoft Visual Basic Scripting as a tool to extend functionality. To modify a Visual Basic script, complete the following steps.

1. In **Application Plan Designer**, in the **Screens** pane, select the appropriate screen, and then do one of the following actions.

Action	Steps
Modify a Visual Basic script for a dictionary data	1. In the **Dictionary** pane, double-click the

Action	Steps
element	dictionary data element for which you want to create a Visual Basic script. 2. In the **Dictionary Field** dialog box, under **Processing**, select the script you want to modify and then click **Modify**. 3. In the **Script** dialog box, select the script you want to modify and then click **Modify**. 4. Select the script you just created and click **Modify**.
Modify a Visual Basic script for a map value	1. In the right pane, click the **Map** tab, and then double-click the value you want to modify in a Visual Basic script. 2. In the **Attributes** dialog box, under **Advanced**, from the **Scripts** list, select **Manage Scripts**. 3. In the **Script** dialog box, select the script you want to modify, and then click **Modify**.

2. In the **Script - New Script** dialog box, modify your Visual Basic script by typing the information in the text box under **Script**.
3. Under **Sample**, in the **Input** box, enter a value that allows you to test the script you just created.
4. Click **Test**, and verify that the script returns the appropriate value.
5. To close the **Script - New Script** dialog box, click **OK**.
6. To close the **Scripts** dialog box, click **OK**.
7. To close the **Dictionary Field** dialog box or **Attributes** dialog box, click **OK**.
8. Close **Application Plan Designer**.

Remove a Visual Basic script

This procedure removes a visual basic script from a defined data element. To remove a Visual Basic script, complete the following steps.

1. In **Application Plan Designer**, in the **Screens** pane, select the appropriate screen, and then do one of the following actions:

Situation	Steps
Remove a Visual Basic script applied to a dictionary data element	1. In the **Dictionary** pane, double-click the dictionary data element where you want to

Situation	Steps
	remove a Visual Basic script. 2. In the **Dictionary Field** dialog box, under **Processing**, select the script you want to delete and then click **Modify**. 3. In the **Scripts** dialog box, select the script you want to delete and then click **Delete**. 4. In the confirmation dialog box, click **Yes**. 5. To close the **Scripts** dialog box, click **OK**. 6. To close the **Dictionary Field** dialog box, click **OK**.
Remove a Visual Basic script applied to a map value	1. In the right pane, click the **Map** tab, and then double-click the value for which you want to remove a Visual Basic script. 2. In the **Attributes** dialog box, in the **Script** list, select **None**. 3. To close the **Attributes** dialog box, click **OK**.

2. Close **Application Plan Designer**.

Rename a Visual Basic script

In Perceptive Content, you can use Microsoft Visual Basic Scripting as a tool to extend functionality. To rename a Visual Basic script, complete the following steps.

1. In **Application Plan Designer**, in the **Screens** pane, select the appropriate screen, and then do one of the following actions:

Situation	Steps
Rename a Visual Basic script in applied to a dictionary data element	1. In the **Dictionary** pane, double-click the dictionary data element where you want to rename a Visual Basic script. 2. In the **Dictionary Field** dialog box, under **Processing**, select the script you want to rename and then click **Modify**. 3. In the **Scripts** dialog box, select the script you want to rename, and then click **Rename**.

Situation	Steps
	4. Type the new name of the script. 5. To close the **Scripts** dialog box, click **OK**. 6. To close the **Dictionary Field** dialog box, click **OK**.
Rename a Visual Basic script applied to a map value	1. In the right pane, click the **Map** tab, and then double-click the value where you want to rename a Visual Basic script. 2. In the **Attributes** dialog box, under **Advanced**, select **Script > Manage Scripts**. 3. In the **Scripts** dialog box, select the script you want to rename, and then click **Rename**. 4. Type the new name of the script. 5. To close the **Scripts** dialog box, click **OK**. 6. To close the **Attributes** dialog box, click **OK**.

2. Close **Application Plan Designer**.

Visual Basic script functions

The following list describes key functions you can use in your scripts. Each list item contains information about a function, its syntax, any arguments you need to supply, an example of the function, and the results of the example.

AppGetData

This function returns a screen element.

Syntax

```
String appGetData(int hwnd, String Path, String Type)
```

Arguments

Use `FindWindow` to get the identifier of the window (hwnd). The type can be any of the following quoted strings. Value is the default.

- Name
- Description
- Window
- Value

String `Path` can be a point, the path, or a path/name. When it is a point, it is relative to the top left corner of the host application. The path is designated by children (1|4 would be the first child of the window, and then its fourth child).

A name can be specified using the format `n^String`. It looks for the *Nth* instance of that name, where *N* is the number specified. If the number is not specified it uses the first instance of the name found.

Example

```
Point = appGetData(hwnd, "POINT(150,200)", "Value")
Path = appGetData(hwnd, "4|4|4|3|4|1|1|1|1|1|1|1|4|1|5|1", "Value")
Name = appGetData(hwnd, "1|2^Test|4|1|1|3", "Value")
```

Result

Result is Smith, John F .

AppGetDataVisible

This function returns a screen element from a visible window.

Syntax

```
String appGetDataVisible(int hwnd, String Path, String Type)
```

Arguments

Use `FindWindow` to get the identifier of the window (hwnd). The type can be any of the following quoted strings. Value is the default.

- Name
- Description
- Window
- Value

String `Path` can be a point, the path, or a path/name. When it is a point, it is relative to the top left corner of the host application. The path is designated by children (1|4 would be the first child of the window, and then its fourth child).

A name can be specified using the format `n^String`. It looks for the *Nth* instance of that name, where *N* is the number specified. If the number is not specified it will use the first instance of the name found.

Example

```
Point = appGetDataVisible(hwnd, "POINT(150,200)", "Value")
```

```
Path = appGetDataVisible(hwnd, "4|4|4|3|4|1|1|1|1|1|1|1|4|1|5|1",
"Value")
```

```
Name = appGetDataVisible(hwnd, "1|2^Test|4|1|1|3", "Value")
```

Result

The result is Smith, John F .

ClipboardGetData

This function returns data from a DOS or terminal application using the clipboard.

Syntax

```
string ClipboardGetData(int hwndSelectedWind, int Position, int Length,
int ConnectionDelay, int ConnectionRetries, string ConnectionString)
```

Arguments

Int `hwndSelectWind` is the window handle of the application plan.

Int `Position` is the starting position. This argument assumes a starting position at 80 columns. For example, 0-80 is line one, 81-161 is line two, 162-242 is line three, and so on.

Int `Length` is the number of characters to capture.

Terminal Capture Arguments

Int `ConnectionDelay` sets the delay in the seconds between connection attempts.

Int `ConnectionRetries` is the number of times to retry.

String `ConnectionString` determines how to capture the data.

Example

```
window = FindWindow("Test App")

results = ClipboardGetData(window, 0, 20, 5, 5, "57634;")
```

Result

The result is Smith, Jones .

DeleteChars

This function deletes all specified characters.

Syntax

```
STR DeleteChars(STR SourceStr, STR CharsStr)
```

Arguments

String `rawValue` is the string from which you want to remove characters.

String `charsToDelete` are the characters to delete from the `rawValue` string.

Example

```
WorkingValue = DeleteChars(folder, "()- ")
```

Result

The string "(913) 111-1111" becomes "9131111111".

DeleteCharsOfType

This function deletes the specified characters of a certain type.

Syntax

```
STR DeleteCharsOfType(STR SourceStr, STR TypeStr)
```

Arguments

- p specifies punctuation.
- a specifies alphabetical characters.
- d specifies numeric characters.

Example

```
WorkingValue = DeleteCharsOfType(folder, "pa")
```

Result

The string abc9999.. becomes 9999 .

DeleteRangeOfChars

This function parses a string and deletes the specified amount of characters from that string.

Syntax

```
STR DeleteRangeOfChars(STR SourceStr, int StartPos, int Len)
```

Arguments

String `rawValue` is the string from which to remove characters.

Integer `startChar` is the starting position in the `rawValue` string.

Integer `length` is the number of characters after `startChar` to delete.

Example

```
WorkingValue = DeleteRangeOfChars(folder, 0, 3)
```

Result

The string abcdefgh becomes defgh .

DoMacroAlpha

This function removes all non-alphabetic characters.

Syntax

```
STR DoMacroAlpha(STR rawValue)
```

Arguments

String `rawValue` is the string of non-alphabetic characters you want to remove.

Example

```
msgbox "Alpha: " + DoMacroAlpha("a1@b2#c3$")
```

Result

The string a1@b2#c3$ becomes abc .

DoMacroAlphaNumeric

This function removes all non-alphanumeric characters.

Syntax

```
STR(STR rawValue)
```

Arguments

String `rawValue` is the string from which to remove non-alphanumeric characters.

Example

```
msgbox "AlphaNumeric: " + DoMacroAlphaNumeric("a1@b2#c3$")
```

Result

The string "a1@b2#c3$" becomes a1b2c3 .

DoMacroDateConversion

This function converts a string variable to a variable of date type.

Syntax

```
STR(STR rawValue, string dateFormat)
```

Arguments

String `rawValue` is the string to convert to a date.

String `dateFormat` is the format in which the date string was passed. You can include the following format variables:

- m represents a month number
- M represents a month letter
- d represents day
- y represents year

Example

```
msgbox "Date: " + DoMacroDateConversion("OCT 16th, 1978", "MMM dd, yyyy")
```

Result

The string OCT 16th, 1978 becomes 10/16/1978 .

DoMacroDeleteCharacters

This function removes specific characters from a string.

Syntax

```
STR(STR rawValue", STR charsToDelete)
```

Arguments

String `rawValue` is the value from which to remove the characters.

String `charsToDelete` is the list of characters to remove from rawValue.

Example

```
msgbox "Delete Characters: " + DoMacroDeleteCharacters("INV-778989",
"INV-")
```

Result

The string INV-778989 becomes 778989 .

DoMacroLeadingZeros

This function removes leading zeros from a string.

Syntax

```
STR(STR or int rawValue)
```

Arguments

String `rawValue` is the value from which the leading zeros are removed.

Example

```
msgbox "Remove Zeros: " + DoMacroLeadingZeroes("000012345")
```

Result

The string 000012345 becomes 12345 .

DoMacroFixedLength

This function returns the designated amount of characters from a string.

Syntax

```
STR DoMacroFixedLength(STR rawValue, int length, bool fromLeft)
```

Arguments

String `rawValue` is the value to convert.

Integer `length` is the number of characters to return from the string value.

If the boolean `fromLeft` is set to true, the substring returned is the number of characters starting from the left, plus the value length. If `fromLeft` is set to false, the substring returned is the number of characters starting from the right, plus the value length.

Example

```
msgbox "Fixed Length (left): " + DoMacroFixedLength("abcdefg", 4, true)
```

Result

The string abcdefg returns abcd .

DoMacroNumberConversion

This function returns a value of type number.

Syntax

```
STR(STR or int rawNum, int numOfDecimals, char separator)
```

Arguments

String or integer `rawNum` is the value to format as a number.

Integer `numOfDecimals` is the total decimal numbers.

Character `separator` is the decimal separator to use.

Example

```
msgbox "Number: " + DoMacroNumberConversion("1234.12", 0, ".")
```

Result

The string 1234.12 becomes 1234 .

DoMacroNumeric

This function converts a string variable to a numeric variable.

Syntax

```
STR(STR rawValue)
```

Arguments

String `rawValue` is the string from which to remove non-numeric characters.

Example

```
msgbox "Number: " + DoMacroNumber("INV-8899878")
```

Result

The string INV-8899878 returns 8899878 .

DoMacroLineSearch

This function searches multiple lines based on the input string and extracts data from the specified line.

Syntax

```
STR DoMacroLineSearch(STR Input, int LineNum, STR Direction, int
StartPos, STR StopType, STR StopValue)
```

Arguments

String `Input` is the string to search.

Integer `LineNum` is the line of text from input to process (1 is the first line).

String `Direction` is either "Forward" or "Backward" and is the direction to search.

Integer `StartPos` is where in the line of text the data starts. When direction is backward, the first character position is the end of the line.

String `StopType` indicates how many characters from the StartPos to return. Valid quoted string values include:

- End Of Line
- Character Length
- Stopping Characters

Example

```
input = "this is a test" & vbNewLine & "This is only a test" &
vbNewLine & "Testing 1, 2, 3"

text1 = DoMacroLineSearch(input, 2, "Forward", "9", "Character
Length", "6")
```

Result

The result string is only a .

Additional information

If StopType is "Character Length", StopValue is a number of characters to return. If StopType is "Stopping Characters", the StopValue is a character pattern that indicates where to stop the string returned.

DoMacroStaticSearch

This function searches for text based on the input string and returns text from the results.

Syntax

```
STR DoMacroStaticSearch(STR Input, STR AnchorText, int LineOffset, STR
Direction, STR StopType, STR StopValue)
```

Arguments

String `Input` is the string to search.

String `AnchorText` is the text to search for.

Integer `LineOffset` is the number of lines above or below the anchor text to select. Zero(0) selects the line that contains the `AnchorText`, a negative number s a line above and a positive number selects a line below.

String `Direction` is either "Forward" or "Backward" and is the direction to search.

String `StopType` indicates how many characters from the StartPos to return. Valid quoted string values include:

- End Of Line
- Character Length
- Stopping Characters

Example

```
Input = "this is a test" & vbNewLine & "This is only a test" &
vbNewLine & "Testing 1, 2, 3"

"Forward", "End Of Line",)
```

Result

The result string is Testing 1, 2, 3 .

Additional information

If StopType is "Character Length", StopValue is a number of characters to return. If StopType is "Stopping Characters", the StopValue is a character pattern that indicates where to stop the string returned.

DoMacroUser

This function returns a value of type Perceptive Content username.

Syntax

```
DoMacroUser(String userName)
```

Arguments

String `userName` is the user name to pass into Perceptive Content.

Example

```
msgbox "User: " + DoMacroUser("jsmith")
```

Result

The result is User:jsmith .

DocProperty

This function can set a property for a document or return the desired value.

Syntax

```
string DocProperty(string customPropName)
```

Arguments

String `customProperty` is the name of the custom property that needs to be set.

Example

DocProperty("Name") = " Jane Doe"

Result

The result string is Name: Jane Doe .

Field

This function can set or return the current value from an element in the dictionary.

Syntax

```
string Field(string dictionaryElement)
```

Arguments

String `dictionaryElement` is the dictionary element name.

Example

```
msgbox Field("Last Name")
```

Result

Returns the current value from the dictionary element called Last Name.

FolderProperty

This function can set a property for a folder or return a specific value.

Syntax

```
string FolderProperty(string customPropName)
```

Arguments

String `customPropName` is the name of the custom property that needs to be set.

Example

```
FolderProperty("Patient ID") = "9910552"
```

Result

The result string is Patient ID: 9910552 .

FindWindow

This function searches the desktop for a window title that matches the argument.

Syntax

```
int FindWindow(STR WindowTitle)
```

Arguments

String `WindowTitle` is the title to search for and can include wildcards (* or ?)

Example

```
hwnd = FindWindow("Internet Explorer")
```

Result

The result is an integer that identifies the window in the system.

Additional information

The returned value is most useful when used as the first parameter to `AppGetData`.

GetActiveScreenName

This function returns the user defined screen name that Perceptive Content is currently using.

Syntax

```
GetActiveScreenName()
```

Example

```
msgbox GetActiveScreenName()
```

Result

Returns the current user defined screen name.

GetINowINIString

This function reads a string from the *ImageNow.ini* file.

Syntax

```
string GetINowINIString(string SectionName, string KeyName)
```

Arguments

String `SectionName` is the name of the section in the INI file to search for the key.

Example

```
Result = GetINowINIString("Logon Settings", "Default")
```

Result

Result contains the name of the default Perceptive Content connection profile.

GetScreenText

This function gets the text on the screen at the supplied x and y coordinates, to the specified length.

Syntax

```
String GetScreenText(int Xpos, int Ypos, int Len)
```

Arguments

Integer `Xpos` is the horizontal position of the first character retrieved with a value of 1 indicating the leftmost character.

Integer `Ypos` is the vertical position of the first character retrieved with a value of 0 being the topmost line.

Integer `Length` is the number of characters to return.

Example

```
WorkingValue = GetScreenText(0, 8, 15)
```

Result

The result string is City: Crestview .

HyperlearnCreateFont

This function creates the font string necessary for HyperlearnGetData.

Syntax

```
string HyperlearnCreateFont(string fontName, int fontSize, int Weight,
int Italic)
```

Arguments

String `fontName` is the name of the font.

Integer `fontSize` is the size of the font.

Integer `Weight` is 400 for normal weight fonts, 700 for bold.

Integer `Italic` is 0 for normal, 1 for italic.

Example

```
font = HyperlearnCreateFont("Courier", 12, 400, 0)
```

Result

The result string is -11,0,0,0,400,0,0,0,0,0,0,0,0,Courier .

HyperlearnGetData

This function extracts the text from an area of a window using Hyperlearn technology.

Syntax

string HyperlearnGetData(int selectedWindow, int left, int top, int width, int height, string font)

Arguments

Integer `hwndSelectWind` is the window handle from which to get data. Use the `FindWindow()` method to get the window handle.

Integer `left` is the left side of the rectangle that specifies where HyperLearn should look for text.

Integer `top` is the top of the rectangle that specifies where HyperLearn should look for text.

Integer `height` is the height of the rectangle that specifies where HyperLearn should look for text.

String `font` specifies the font HyperLearn should use when looking for text in the specified rectangle.

Example

```
hwnd = FindWindow("PSI higher Ed Demo")

font = HyperlearnCreateFont(Courier, 12, 400, 0)

result = HyperlearnGetData(hwnd, 100, 200, 50 16 font)
```

Result

The text extracted from the area at pixel coordinates 100, 200 with a width of 50 pixels and a height of 16 pixels from the window titled "PSI Higher Ed Demo."

Additional information

HyperlearnCreateFont creates the font string. You must first add fonts to the application plan to receive results.

IntToStr

This function converts an integer to a string.

Syntax

```
String IntToString(int Num)
```

Arguments

Integer `Num` is the integer value to convert to a string format.

Example

```
s=IntToString(99)
```

Result

The result string is 99 .

Additional information

This method was deprecated in version 6.7. Replace it with the Visual Basic Scripting method, CStr.

LogError

This function writes a message to the client log file.

Syntax

```
void LogError(String message)
```

Arguments

Message to be written to the log

Example

```
LogError( an error occurred in the LearnMode script )
```

Result

The result string is added to the client log file.

LogWarning

This function writes a message to the client log file.

Syntax

```
void LogWarning(String message)
```

Argument

```
Message to be written to the log
```

Example

```
LogWarning( something happened in the LearnMode script )
```

Result

If the client log level is 1 or greater, the string is added to the client log file. If the client log level is 0, then no action is taken.

NameReorder

This function converts a string that contains a first name, a space, and a last name to a last name, comma, first name format.

Syntax

```
STR NameReorder(STR SourceStr)
```

Arguments

String `SourceStr` is the string that is reordered.

Example

```
WorkingValue = NameReorder(folder)
```

Result

The string John Doe becomes Doe, John .

PostDocProperty

This function can set a property for a folder or return the desired value.

Syntax

```
string PostDocProperty(string customPropName)
```

Arguments

String `customPropName` is the name of the custom property that needs to be set.

Example

```
PostDocProperty("Patient ID") = "9910552"
```

Result

The string result is 9910552 .

PostField

This function can set the current value or return from an element in the dictionary.

Syntax

```
string PostField(string dictionaryElement)
```

Arguments

String `dictionaryElement` is the dictionary element name.

Example

```
msgbox PostField("Last Name")
```

Result

Returns the current value from the dictionary element called Last Name.

PostFolderProperty

This function can set a property for a folder or return a specific value.

Syntax

```
string PostFolderProperty(string customPropName)
```

Arguments

String `customPropName` is the name of the custom property that needs to be set.

Example

```
PostFolderProperty("Name") = " Joe Smith"
```

Result

The result string is Name: Joe Smith .

SetFocus

Searches for a named window and gives it input focus.

Syntax

```
int SetFocus(string windowTitle)
```

Arguments

String `windowTitle` is the title of the window for which to search.

Example

```
success = SetFocus("PSI Higher Ed Demo")
```

Result

The window titled "PSI Higher Ed Demo" moves to the foreground and has input focus. Success equals 1 if the window is found.

SetForeground

This function finds the window with a given handle and gives it input focus.

Syntax

```
int SetForeground(Int64 hWnd)
```

Arguments

Integer `hWnd` is the window handle that receives focus.

Example

```
hwnd = FindWindow("PSI Higher Ed Demo")

result = SetForeground(hwnd)
```

Result

The window titled "PSI Higher Ed Demo"moves to the foreground and has input focus. Success equals 1 if the window is found.

ShellOpen

This function launches a program or a file.

Syntax

```
ShellOpen(String Command)
```

Arguments

Command is a program or a file to open.

Example

```
ShellOpen("c:\Somefile.txt")

ShellOpen("calc.exe")
```

Result

NotePad opens with *c:\Somefile.txt* loaded. The calculator application also is opened.

Sleep

This function establishes the amount of time to pause without doing anything.

Syntax

```
void Sleep(int msec)
```

Arguments

Supply the time for `msec` in milliseconds.

Example

```
Sleep(100) ' 1/10th of a second
```

Result

The script is paused for 1/10th of a second.

SwipSwapFromBegin

This function takes a specified number of characters from the beginning of a string and moves them to the end of the string.

Syntax

```
STR SwipSwapFromBegin(STR SourceStr, int Len)
```

Argument

Supply the string in `SourceStr`. Integer `Len` is the number of characters to take, starting at the beginning of the string.

Example

```
WorkingValue = SwipSwapFromBegin(folder, 3)
```

Result

The string result is abcdefgh becomes defghabc .

SwipSwapFromEnd

This function takes a specified number of characters from the end of a string and moves them to the beginning of the string.

Syntax

```
STR SwipSwapFromEnd(STR SourceStr, int Len)
```

Arguments

Supply the string in `SourceStr`. Integer `Len` is the number of characters to take, starting at the end of the string.

Example

```
WorkingValue = SwipSwapFromEnd(folder, 3)
```

Result

The result string abcdefgh becomes fghabcde .

SwipSwapFromPos

This function moves a specified number of characters from one position to another in a string.

Syntax

```
STR SwipSwapFromPos(STR SourceStr, int StartPos, int Len, int EndPos)
```

Arguments

Supply the string in `SourceStr`. Integer

`StartPos` is the starting character position beginning at 0.

Integer `Len` is the number of characters to take.

Integer `Endpos` is the character position where the string is moved, where the first character is 0.

Example

```
WorkingValue = SwipSwapFromPos(folder, 4, 2, 1)
```

Result

The string abcdefgh becomes aefbcdgh .

Term

This function searches for windows to close based on "CLASS" or "TITLE."

Syntax

```
int Term String Mode, String Name, String Command
```

Arguments

String `Mode` specifies how to search for windows to close based on "CLASS", or "TITLE." "CLASS" searches for windows with a class that exactly matches the Name parameter. "TITLE" searches for windows whose title text contains the Name parameter.

String `Name` is the string to match in the window title or class. This parameter is case sensitive.

String `Command` specifies how to close matched windows and can be "QUIT," or "CLOSE." In general, windows that receive the "CLOSE" message prompt the user to save changes before closing. The "QUIT" message closes the application immediately.

Example

```
Term = "TITLE," "NotePad," "QUIT."
```

Result

All open NotePad windows are closed.

TopMsg

This function displays a window with the specified text.

Syntax

```
TopMsg(string message)
```

Arguments

String `message` is the message to display.

Example

```
TopMsg = "Hello World"
```

Result

A dialog box displays the text "Hello World" inside.

WindowTitle

This function returns a specified number of characters in the window title of the current window.

Example

```
myWindowTitle = WindowTitle
```

Result

The string result is   PSI Banking Demo .

WinGetData

This function returns text from a window using WindowWalker.

Syntax

```
string WinGetData(int windowHandle, string directions)
```

Arguments

Integer `selectedWindow` is the handle to the window from which to get data. Use the `FindWindow()` function to get the window handle.

String `directions` is the information passed to the WindowWalker extractor to access the control.

Example

```
hwnd = FindWindow("PSI Higher Ed Demo")

result = WinGetData(hwnd, "D3;L7")
```

Result

The result string is 206528888 .

Testing VB script functions

The Test button in the script editor does not always produce valid results when using these functions. To test your code, save the template, close the application plan, and then click on the icon in the Perceptive Content toolbar to view the results.

Visual Basic script variables

Below is a list of variables you can use in your Visual Basic scripts.

The Test button in the script editor does not always produce valid results when using these functions. To test your code, try saving the template, closing the application plan, and then clicking on the icon in the ImageNow Client toolbar to view the results.

> **Note:** In previous versions of Perceptive Content, you used Folder and Tab. In Perceptive Content 6.7, these supported document key variables changed to Field1 and Field2. While Folder and Tab are currently supported, they may be deprecated in future versions.

Document key variables

Drawer

DocName

Field1

Field2

Field3

Field4

Field5

DocType

Post-macro document key variables

PostDrawer

PostDocName

PostField1

PostField2

PostField3

PostField4

PostField5

PostDocType

Other variables

User - Logged in user name

Group - Logged in user group name

AppPlan - Name of the current application

Reserved variables

WorkingValue - Sets the current dictionary element to the desired value. This can also be used to get the current dictionary element.

ScreenFound - The default for this value is FALSE. The script sets the value to TRUE if the screen is found. If FALSE, the next available screen is used.

Visual Basic scripts for DDE

You can use the following functions in any script in application plan types. These functions are useful with the DDE LearnMode type.

The Test button in the script editor does not always produce valid results when using these functions. To test your code, try saving the template, closing the application plan, and then clicking on the icon in the ImageNow Client toolbar to view the results.

Note: These Dynamic Data Exchange methods are deprecated in Perceptive Content 6.7. In previous versions of Perceptive Content, you used Folder and Tab. In Perceptive Content 6.7, these supported document key variables changed to Field1 and Field2. While Folder and Tab are currently supported, they may be deprecated in future versions.

Script Name	Syntax
DDEExecute	int DDEExecute(int Channel, STR CommandStr)
DDEInitiate	int Channel = DDEInitiate(STR AppStr, STR TopicStr)
DDEPoke	int DDEPoke(int Channel, STR ItemStr, STR DataStr)
DDERequest	STR DDERequest(int Channel, STR ItemStr)
DDETerminate	int DDETerminate(int Channel)

DDE Script Example

The following example script reads keys from Microsoft Excel.

```
nChannel = DDEInitiate("excel", "test.xls")
if nChannel <> -1 then
s = DDERequest(nChannel, "R1C1")
field1 = left(s, len(s)-2)
s = DDERequest(nChannel, "R1C2")
field2 = left(s, len(s)-2)
s = DDERequest(nChannel, "R1C3")
field3 = left(s, len(s)-2)
s = DDERequest(nChannel, "R1C4")
field4 = left(s, len(s)-2)
s = DDERequest(nChannel, "R1C5")
field5 = left(s, len(s)-2)
DDETerminate(nChannel)
end if
```

Visual Basic scripts for Internet Explorer

You can use the functions described in this section in any script in application plan types. These functions are only effective in capturing values from Microsoft Internet Explorer pages. They are useful with the Internet Explorer LearnMode type.

IECapture

This function captures the data from Internet Explorer in the form of name/value pairs and stores them for subsequent searches. It returns the number of pairs found.

Syntax

```
IECapture (bool useTDtags, HWND hwndSelectedWind)
```

Arguments

`useTDTags`: use this boolean if LTD tags need to be captured.

`hwndSelectedWind`: specifies the handle for the window to capture the data from, 0 to use the top-most Internet Explorer window.

Example

```
size = IECapture(false, 0)
```

Results

0: <PEB#1>,"Student Name:"

1: <PEB#2>,"Smith, James"

2: <PEB#3>, "Student ID:",

3: <PEB#4>,"1234567"

4: <PEB#5>,"Date of Birth:"

5: <PEB#6>, "6/14/1987"

size = 6

Example

```
size = IECapture(true, 0)
```

Results

0: <LTD#1>, Student Name:

1: <LTD#2>, Smith, James

2: <LTD#3>, Student ID:

3: <LTD#4>, 1234567

4: <LTD#5>, Date Of Birth:

5: <LTD#6>, 6/14/1987

6: <LTD#7>, First Term:

7: <LTD#8>, Fall 2008

8: <PEB#1>, Student Name:

9: <PEB#2>, Smith, James

10: <PEB#3>, Student ID:

11: <PEB#4>, 1234567

12: <PEB#5>, Date of Birth:

13: <PEB#6>, 6/14/1987

size = 14

Note: You must use the IECapture or the IECaptureEx function first to store data for subsequent searches. All the following function examples use IECapture(true, 0) or IECaptureEx(true, 0, myArray).

IECaptureEx

This function captures a specified set of named fields from Internet Explorer and stores them for subsequent searches.

Syntax

```
IECaptureEx (bool useTDtags, HWND hwndSelectedWind, VARIANT* pVarIDs)
```

Arguments

`useTDTags`: use this boolean if LTD tags need to be captured.

`hwndSelectedWind`: specifies the handle for the window to capture the data from, 0 to use the top-most Internet Explorer window.

`pVarIDs`: a list of IDs to capture from Internet Explorer.

Example

```
myArray = Array( CSID ,  CSID2
size = IECaptureEx(false, 0, myArray)
```

Results

0: CSID,   12n53n43

1: CSID2,   25n232

2: <PEB#1>,   Student Name:

3: <PEB#2>,   Smith, James

4: <PEB#3>,   Student ID:

5: < PEB#4>,   1234567

6: <PEB#5>,   Date of Birth:

7: <PEB#6>,   6/14/1987

size = 8

Example

```
myArray = Array(  )
size = IECaptureEx(true, 0, myArray)
```

Results

0: <LTD#1>, Student Name:

1: <LTD#2>, Smith, James

2: <LTD#3>, Student ID:

3: <LTD#4>, 1234567

4: <LTD#5>, Date of Birth

5: <LTD#6>, 6/14/1987

6: <LTD#7>, First Term:

7: <LTD#8>, Fall 2008

8: <PEB#1>, Student Name:

9: <PEB#2>, Smith, James

10: <PEB#3>, Student ID:

11: <PEB#4>, 1234567

12: < PEB#5>, Date of Birth

13: <PEB#6>, 6/14/1987

size = 14

IEGetNameByIndex

This function returns the name at the specified index.

Syntax

```
IEGetNameByIndex (int nIndex)
```

Arguments

`nIndex`: specifies the location of the tag. Zero returns the first tag.

Example

```
name = IEGetNameByIndex(1)
```

Results

name = <LTD#2>

Note: You must use the IECapture function first to store data for subsequent searches. This example uses IECapture(true, 0).

IEGetValueByIndex

This function returns the value at the specified index.

Syntax

```
IEGetValueByIndex (int nIndex)
```

Arguments

`nIndex`: specifies the location of the value. Zero returns the first value.

Example

```
value = IEGetValueByIndex(1)
```

Results

value = Smith, James

> **Note:** You must use the IECapture function first to store data for subsequent searches. This example uses IECapture(true,0).

IEFindName

This function allows you to search for a name and it returns the location where it was found. It returns -1 if not found.

Syntax

```
IEFindName (LPCTSTR name, int nStart, bool bCaseSensitive)
```

Arguments

`Name`: specifies the name to search for.

`nStart`: specifies the location to start at. Use 0 to start the search from the beginning

`bCaseSensitive`: use this boolean if the search is case sensitive.

Example

```
nameLocation = IEFindName ( <PEB#1> , 0, false)
```

Results

nameLocation = 8

> **Note:** This function supports wild card characters such as * and ?. You must use the IECapture function first to store data for subsequent searches. This example uses IECapture(true,0).

IEFindNameReverse

This function allows you to search for a name in reverse and it returns the location where it was found. It returns -1 if not found.

Syntax

```
IEFindNameReverse (LPCTSTR name, int nStart, bool bCaseSensitive)
```

Arguments

`Name`: specifies the name to search for.

`nStart`: specifies the location to start at. Use -1 to start at the end.

`bCaseSensitive`: use this boolean if the search is case sensitive.

Example

```
nameLocation = IEFindNameReverse ( <PEB#1> , 6, true)
```

Results

nameLocation = -1

> **Note:** This function supports wild card characters such as * and ?. You must use the IECapture function first to store data for subsequent searches. This examples uses IECapture(true,0).

IEFindValue

This function allows you to search for a value and it returns the location where it was found. It returns -1 if not found.

Syntax

```
IEFindValue (LPCTSTR value, int nStart, bool bCaseSensitive)
```

Arguments

`Value`: specifies the value to search for.

`nStart`: specifies the location to start at. Use 0 to search from the beginning.

`bCaseSensitive`: use this boolean if the search is case sensitive.

Example

```
valuelocation = IEFindValue( Student Name: , 0, true)
```

Results

valueLocation = 0

> **Note:** This function supports wild card characters such as * and ?. You must use the IECapture function first to store data for subsequent searches. This example uses IECapture(true,0).

IEFindValueReverse

This function allows you to search for a value in reverse and it returns the location where it was found. It returns -1 if not found.

Syntax

```
IEFindValueReverse (LPCTSTR value, int nStart, bool bCaseSensitive)
```

Arguments

`Name`: specifies the value to search for.

`nStart`: specifies the location to start at. Use -1 to start at the end.

`bCaseSensitive`: use this boolean if the search is case sensitive.

Example

```
valueLocation = IEFindValueReverse( Student Name: , -1, true)
```

Results

valueLocation = 8

> **Note:** This function supports wild card characters such as * and ?. You must use the IECapture function first to store data for subsequent searches. This example uses IECapture(true,0).

IEGetValue

This function returns the value when passed the name of the name/value pair.

Syntax

```
IEGetValue (LPCTSTR value, bool bCaseSensitive)
```

Arguments

`Name`: specifies the name to search for.

`bCaseSensitive`: use this boolean if the search is case sensitive.

Example

```
WorkingValue = IEGetValue ( <LTD#12> )
```

Results

The value, which corresponds to the name <LTD#12>, is placed into folder.

Note: This function supports wild card characters such as * and ?. You can use the IEGetValue function as a shortcut to calling IECapture and then IEGetValueByName. However, a single IECapture and multiple IEGetValueByName calls is a faster option if you need multiple values.

IEGetValueByName

This function allows you to search for a name and it returns the corresponding value. It returns an empty string if not found.

Syntax

```
IEGetValueByName (LPCTSTR name, bool bCaseSensitive)
```

Arguments

`Name`: specifies the name to search for.

`bCaseSensitive`: use this boolean if the search is case sensitive.

Example

```
value = IEGetValueByName( <PEB#1> , false)
```

Results

value = Student Name:

Note: This function supports wild card characters such as * and ?. You must use the IECapture function first to store data for subsequent searches. This example uses IECapture(true,0).

The Test button in the script editor does not always return valid results when you use these functions. To test your code, save the template, close the application plan, and then click the icon in the ImageNow Client toolbar to view the results.

Add a user-defined script to a button

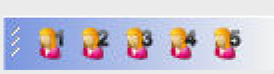
To add Visual Basic scripts to buttons in the User toolbar, complete the following steps.

1. In **ImageNowViewer**, display any document.
2. Click **View > Toolbars > User**.

   Note: The **User** toolbar contains five user-defined function buttons.

3. Right-click one of the function buttons and then click **Edit Script.**

   Note: If a script has already been added to this button and you don't want to replace it, click **Cancel** and then right-click other function buttons until you find one that is unused.

4. In the **Script Edit Dialog** dialog box, from the **Script Type** list, select **Pre** and type the first script you want to run when a user clicks the button.
5. Optional. To run a second script after the first script, using the same button, from the **Script Type** list, select **Post** and then type the second script.
6. Click **OK**.

Run a script upon opening a workflow item

You can create a VBScript that executes each time a workflow item is open. This is a global script that executes for all workflow queues in all workflow processes that exist on the ImageNow Server you are running. To run a script upon opening a workflow item, complete the following steps.

1. Open a workflow item.
2. In **ImageNowViewer**, click **Workflow > Page Load Script**.
3. In the **Workflow Page Load Script** dialog box, type in your VBScript, and then click **OK**.
4. Close the item, and then in the confirmation box, click **Yes**.

Configure print and scan

ImageNow Printer properties

ImageNow Printer prints an electronic file from an application, such as Microsoft Excel, into a document. You can configure property options such as color, orientation, and watermark type. The following tables describe each ImageNow Printer property.

Advanced features

The following table lists the options available on the Advanced Features tab.

Units

Determines whether the units of measure for the hardware margins and custom paper options are in one-hundredths (0.01) of an inch or in tenths (0.1) of a millimeter.

Hardware Margins

Allows you to customize the size of the printer-supplied edge of your outputted image. Enter Left/Right and Top/Bottom hardware margin settings into the appropriate field, using the measurement option you selected for Units.

Enable Custom Paper

Allows you to set a custom paper size for the generated image file. This selection overrides any other paper size selections you set.

Paper Size

Allows you to enter the desired Width and Height for the custom paper size, using the measurement option you selected for Units.

Printer Area Margins

Allows you to enter Left, Right, Top, and Bottom printer area margin settings for the custom paper size, using the measurement option you selected for Units.

License

Allows you to view license information.

Restore defaults

Restores advanced features defaults.

Compression

The following lists the options available on the Compression tab.

Color Images

Allows you to select the compression method to use for color images. Available options are Uncompressed RGB, Uncompressed CMYK, Low Quality JPG, Medium Quality JPG, High Quality JPG, Packbit RGB, Packbits CMYK, LZW RGB, and LZW CMYK.

Indexed Images

Allows you to select the compression method to use for indexed images. Available options are Low Quality JPG, Medium Quality JPG, High Quality JPG, Packbits, LZW, and None.

Greyscale Images

Allows you to select the compression method to use for greyscale images. Available options are Low Quality JPG, Medium Quality JPG, High Quality JPG, Packbits, LZW, and None.

Monochrome Images

Allows you to select the compression method to use for monochrome images. Available options are CCITT Group 4 Fax, CCITT Group 3 2D Fax, CCITT Group 3 1D Fax, CCITT Modified Huffman, LZW, Packbits, and None.

License

Allows you to view license information.

Restore defaults

Restores compression defaults.

FAX and TIFF

The following lists the features available on the Fax/TIFF Options tab.

Enable fax mode

Creates faxable images when selected.

Fax Profile

Allows you to select either Profile F (standard) or Profile S (simplified) as your fax format profile. A fax profile is required if you want to select Enable fax mode.

Fax Resolution

Allows you to select an output resolution. A resolution is required when you select Enable fax mode. Note that this selection overrides any other resolution selection that you set.

EOLs byte aligned

Instructs ImageNow Printer to align rows of CCITT Group 3 1D and 2D image data on word boundaries.

Reverse Bit Order

Specifies whether image data in a CCITT compressed TIFF file is stored in LSB to MSB or MSB to LSB order. Enable this check box to select MSB to LSB order. This option does not apply if you select Enable fax mode and select Profile S as your fax profile.

Invert Photometric

Determines the order of the black and white palette entries for a monochrome TIFF file (MINISWHITE or MINISBLACK). Select this check box to choose MINISBLACK order.

Include creation date and time

Adds the creation time and date to the generated TIFF file.

Use Motorola format

Creates TIFF images using Motorola (big-endian) byte order. The default format is Intel (little-endian) byte order. This option does not apply if you enable fax mode and select Profile S as your fax profile.

Layout

The following lists the options available on the Layout tab.

Orientation

Specifies how the document is positioned on the page. Portrait orients the paper vertically. Landscape rotates the paper 90 degrees clockwise.

Print on Both Sides

Specifies how the document is printed on the page. Choose None, Flip on Long Edge, or Flip on Short Edge.

Advanced

Displays the Advanced Options dialog box.

Paper and quality

The following table lists the options available on the Paper/Quality tab.

Color

Converts documents to color.

Black & White

Converts documents to black and white.

Advanced

Displays the Advanced Options dialog box.

Watermark

The following table lists the options available on the Watermark tab.

Enabled

Allows you to use the watermark feature.

Watermark the first page only

Allows you to apply the watermark to the first page only.

Portrait Pages Image File

Allows you to enter the full path to the image file to use as the watermark.

Portrait Pages Position

Determines how the watermark image is placed on the page in portrait orientation. Available options are Stretch to fit, Tile, and Center.

Portrait Page Brightness

Allows you to adjust the brightness level of the watermark image.

Landscape Pages Image File

Allows you to enter the full path to the image file to use as the watermark.

Landscape Pages Position

Determines how the watermark image is placed on the page in landscape orientation. Available options are Stretch to fit, Tile, and Center.

Landscape Pages Brightness

Allows you to adjust the brightness level of the watermark image.

What is ImageNow Printer?

ImageNow Printer allows you to import an electronic file, such as a Microsoft Office document or an email, convert it to TIFF format, and store it.

You can use ImageNow Printer from any software program that has a print option. The options you set in a capture profile determine how to process documents. Because ImageNow Printer documents are stored as TIFF files, you can annotate them, set the page orientation, color, and watermark options. You can also use ImageNow Printer to highlight a Word document or add a sticky note to an email.

ImageNow Printer is included with ImageNow Client and does not require a separate license.

Scanner

About configuring a scanner

You can configure a scanner for any ImageNow Client computer in your enterprise.

Scanning profiles and capture profiles define the behavior of the scanner in connection with ImageNow Client. You can create up to ten capture profiles and distribute them according to user names, groups, or computer names. The installation procedure depends on the type of scanner and drivers you install.

Assign master configuration files to all Windows user accounts

The master configuration files contain logon profiles, capture profiles, scanning profiles, and custom settings from the originating computer. To copy these files to all Windows users on the same server, complete the following steps.

Prerequisite You must have a scanner installed on the target ImageNow Client computer and upload enough CaptureNow licenses on the ImageNow Server for your scanners. If you use Kofax software, create the correct source in the Scanning Configuration Utility for VRS 4.1.

1. Back up the *inscan.xml*, *indevice.xml*, and *ImageNow.ini* files and, if needed, the other scanning configuration files.
2. Copy the XML and INI files to the *[drive:]**\Program Files\ImageNow*** directory on the target computer and overwrite any existing files with the same names.

   The files you have copied are now the master configuration files.
3. In each *[drive]:\Documents and Settings\<username>\Application Data* directory, delete the **Perceptive Content** folder.

Example The <*user name*> folder is the name for each Windows user account that logged in to Perceptive Content on the target computer.

Change the scanner driver type

To select a different scanner driver for a scanning device, complete the following steps.

Prerequisite This procedure requires CaptureNow licenses available for use to change between Pixel and Kofax drivers.

1. On the **Perceptive Content** toolbar, click **Settings > Options**.
2. In the **ImageNowOptions** dialog box, in the left pane, click **Capture**.
3. On the **General** tab, under **Scanning Profiles**, click **Manage Device List**.
4. In the **Device Manager** dialog box, click **Create**.
5. In the **Driver Type** dialog box, in the **Driver** list, select the new driver type.
6. Click **Next**.
7. Complete the steps in the wizard, which include adding the second scanner license to **Perceptive Content**.
8. Click **Finish**.
9. In the **Perceptive Content Options** dialog box, under **Scanning Profiles**, click **Manage Profile List**.
10. For each scanning profile, perform the following substeps.
    1. Select the profile and click **Modify**.
    2. On the **General** tab, in the **Device** list, select the new device.
    3. On the **Properties** tab, select any needed options
    4. Click **OK**.
11. Test all of your capture profiles.
12. On the **Perceptive Content** toolbar, click **Settings > Options**.
13. In the **Perceptive Content Options** dialog box, perform the following substeps.
    1. In the left pane, click **Capture**.
    2. On the **General** tab, under **Scanning Profiles**, click **Manage Device** List.
    3. In the **Device Manager** dialog box, select the scanner that you no longer need.
14. Click **Delete**.

Connect a scanning workstation to multiple servers

To enable a scanning workstation to connect to different ImageNow Servers, complete the following steps.

Prerequisite This procedure requires that a scanning license is available on the server.

1. Start **Perceptive Content**, connect to the first **ImageNow Server**, and create scanning and capture profiles.

   This captures a token from the first server.
2. Exit **Perceptive Content**.
3. On the Windows user profile folder, in a text editor, open the *ImageNow.ini*file.

4. In the *ImageNow.ini* file, under `[User Preferences]`, add the following line:
   `AcquireTokenDuringScan=1`
5. Save and close the file.
6. Start **Perceptive Content** and connect to the second **ImageNow Server**.
7. Scan a sample document.
8. When prompted to acquire a license, click **Yes**. This captures a token from the second server.

   You can now use the scanning computer with both ImageNow Servers.

Install a scanner overview

To install a scanner on an ImageNow Client computer, complete the following sequence of procedures.

Prerequisite You must log on to Windows using an account in the Windows Administrator Group to successfully install a scanner on your system.

1. Install scanner drivers.
2. Install Kofax VRS.

   If your Perceptive Content solution includes Kofax VRS, you must install Kofax VRS before you connect the scanner.
3. Test a scanner to verify that the drivers function correctly.
4. Configure a scanning device to connect the scanner to **Perceptive Content**.
5. Create a scanning profile.

   In a scanning profile, define scanner-specific features such as paper size, color mode, and image processing filters. You can also copy or move an existing scanning profile.
6. Create a scanner source capture profile:
   1. Create a Single mode capture profile from Scanner source overview.
   2. Create a Batch mode capture profilefrom Scanner source overview.
   3. Create a Package Mode capture profile from Scanner source overview.

   Example In a capture profile, define processing tasks such as a workflow queue to route the scanned pages and how to assign property values. You can also copy or move an existing capture profile, or you can create a new capture profile.

Remove a scanner from ImageNow

This procedure includes steps to release the scanner license token for the removed scanner. On the computer from which you want to remove a scanner, complete the following steps.

1. On the **Perceptive Content** toolbar, click **Settings > Options**.
2. In the **Perceptive Content Options** dialog box, in the left pane, click **Capture**.
3. On the **General** tab, under **Scanning Profiles**, click **Manage Device List**.
4. In the **Device Manager** dialog box, select the scanner and click **Delete**.
5. Confirm the deletion and click **OK** until you return to the **Perceptive Content** toolbar.
6. Exit **Perceptive Content**.

7. Open the *Windows user profile* folder and copy the *inscan.xml* file to the ***[drive:]\Program Files\ImageNow*** directory.
8. For each additional user account on the computer, open the appropriate *Windows user profile* folder and delete the *inscan.xml* file.

Replace a scanner

To replace a scanner, complete one of the following procedures.

- Complete one of the following procedures.
  - When the scanner make and model are the same, perform a routine installation of the scanner. No additional steps are necessary in Perceptive Content.
  - When the scanner make and model are different, copy the scanning settings to another workstation.

Scanner configuration files

This topic describes the configuration files used for scanning in Perceptive Content.

File directories

By default, ImageNow Client files reside in the *[drive:]\Program Files\ImageNow* directory. When you start Perceptive Content for the first time, it creates copies of its configuration files and several folders in the Windows user profile folder found at the *C:\Documents and Settings\<username>\Application Data\Perceptive Content* directories, where <user name> is a placeholder for an individual Windows user account. The ImageNow Client computer may contain a number of these folders. For each Windows user account that logs in to a computer, Perceptive Content downloads its files from the*[drive:]\Program Files\ImageNow* directory to the appropriate Windows user profile folder, described above, on the same computer.

To access a profile folder that is different from the folder for the currently logged-in user, replace `<user name>` with the actual user name. If you replace `<user name>` in this path with `%userprofile%` and copy the path to the Address box of Windows Explorer, Windows automatically opens the user profile folder of the current Windows user account.

When you make changes to capture profiles, scanning profiles, or configuration settings, Perceptive Content only saves the changes for the logged-in Windows user account. These changes are not copied to other Windows user accounts. You can select and maintain different settings for each Windows user on the same computer.

The CaptureNow license for the scanner is stored in the intkinfo.dat file located in the *C:\Documents and Settings\All Users\Application Data\Perceptive Content\etc* directory. This file is called the token for that scanner. For a CaptureNow license, the token is the seat that allows all the users of that computer to use a scanner. CaptureNow licenses are hardware specific. When the intkinfo.dat file is created, you can only use it on the specified computer.

File creation

Perceptive Content creates the *indevice.xml* and *inscan.xml* configuration files when you set up capture or scanning profiles. These files reside in the Windows users profile folder. After you create your scanning and capture profiles, you can use the same profiles on another computer or allow other users on the same computer to use the profiles with their own Windows user accounts.

indevice.xml

Contains all scanner settings, including the scanner name and basic configuration settings. The *indevice.xml* file only exists if a scanner is configured for the workstation.

inscan.xml

Contains all capture profile and scanning profile settings.

Scanning terminology

The following terms are commonly used when configuring and installing scanners for Perceptive Content.

AIPE

Adrenaline Image Processing Engine uses image processing filters to clean the images in a predefined way before the pages are processed by the scanner and allows you to read barcodes and patchcodes.

Master configuration files

The configuration files located in *[drive:]\Program Files\ImageNow* on the originating computer that include logon profiles, capture profiles, scanning profiles, and custom settings.

Originating computer

The computer on which master configuration files were created and from which you are moving or copying files.

Scanner token

The part of the CaptureNow hardware license for the scanner stored in the intkinfo.dat file and Perceptive Content database tables.

Target computer

The computer to which you are moving or copying files to (typically a new computer).

User configuration files

The files that are included in the Windows user profile folder.

VRS

Virtual Re-Scan straightens and cleans the scanned images using artificial intelligence software processing after the pages are processed by the scanner.

Windows user profile folder

The folder located in the *C:\Documents and Settings\<user name>\Application Data\ImageNow* directory on an ImageNow Client computer.

Troubleshoot scanner configuration

Use this topic as a troubleshooting guide after you set up or modify scanner configuration settings, or when errors appear while installing or testing a scanner in Perceptive Content.

A yellow question mark appears in the Windows Device Manager

Cause	Resolution
The scanner is not completely installed. Typically, the INF file associated with the scanner is missing. This error may appear for the Canon DS2500 and other older scanners.	To resolve this issue, download the ISIS/TWAIN drivers and INF for Windows files from http://www.usa.canon.com.

Common errors in Kofax device installation

When I try to install Kofax Adrenaline, a `Sentinel installation failed` message appears.

Cause	Resolution
If this message appears, the Sentinel Driver might already be installed or an older driver from the CD was not installed.	You can disregard this message. However, if the issue persists, follow the instructions for manually installing the Sentinel drivers.

When I try to install Kofax Adrenaline, a message indicating that I need administrative privileges to install the drivers appears.

Cause	Resolution
The SCSI card cannot be verified.	Continue the installation, restart the computer, and verify the SCSI card is listed in Windows Device Manager. If it is not, install the drivers by inserting the Kofax CD and running the setup application on the Adrenaline drivers.

Kofax or one of its drivers could not be installed.

Cause	Resolution
You do not have a Windows account that is part of the Local Administrators group.	To install Kofax, you must have a Windows account that is part of the Local Administrators group. You can manually install the three main drivers that are installed with Kofax.
You need to download the Sentinel Hardware Key Drivers.	You can download the drivers from SafeNets web site using the following URL. http://www.safenet-inc.com/support/tech/sentinal.asp The drivers are located under Sentinel Protection Installer v7.4.0.
You need to download the ASPI layer drivers.	This may be downloaded from the Adaptec web site. http://www.adaptec.com/

Kofax Adrenaline 650 does not appear in the Windows Device Manager.

Cause	Resolution
During the installation, the Windows Account did not have the necessary access rights for the correct placement.	1. Check to see if SCSI card is listed under a name that is not Adrenaline Kofax 650 (such as Initio Ultra SCSI Host Adapter). If so, the Adrenaline drivers did not get installed. 2. To correct this, install the drivers by inserting the Kofax CD and running the setup application on the Adrenaline drivers. If you can not run the setup program, log off and use the built-in Windows Administrator account for the computer without network access. This step prevents any Group Policies from overwriting your permissions. If the error persists, contact Perceptive Software Product Support for assistance contacting Kofax Support.

An "Error Writing Data" message appears in the VCDemo (Error 20099)

Cause	Resolution
You do not have access to the Kofax folder or to the Kofax registry keys.	To provide access, add the user to the list of Windows Power Users or consult the Kofax knowledgebase web site using the following URL: http://knowledgebase.kofax.com/faqsearch/results.aspx?QAID=1482

A "There is no dongle connected" message appears in the VCDemo (Error 20452)

Cause	Resolution
The Sentinel drivers are out of date	Check the SCSI card, cables, and dongle if you are using one. If the error message persists, update the Sentinel Drivers from SafeNets web site using the following URL. http://www.safenet-inc.com/support/tech/sentinal.asp

An error message indicating the product license does not include image processing appears in the VCDemo (Error 20451)

Cause	Resolution
If you are using a Kofax VRS Professional Workgroup or Production license, you need to activate the license.	Click **Start > All Programs > Kofax VRS > Activate VRS**.
If you are using a SCSI 650i card, some of the Kofax drivers might not be installed.	Go to Windows Device Manager and look for the SCSI card. If it is not listed, install the drivers by inserting the Kofax CD and running the setup application on the Adrenaline drivers.

An "Unknown ISIS Drivers" message appears in the VCDemo (Error 20393)

Cause	Resolution
The ISIS drivers may be corrupted and you must reinstall the drivers	Reinstall ISIS drivers

What are scanner tokens?

For a CaptureNow license, the token is the seat that allows all the users of that computer to use a scanner with Perceptive Content.

Each scanner you connect to the ImageNow Client acquires a token provided by the CaptureNow license on the ImageNow Server. CaptureNow licenses are hardware specific, so if you need to move a scanner from one computer to another, or if a scanner is no longer used with that computer, you must release the token before using it with another scanner. Typically, a token is removed automatically when you remove the scanner from the ImageNow Client.

Barcodes

Barcode triggers in CaptureNow

You can configure CaptureNow to use barcodes to separate documents, separate groups of documents, or to automatically assign document property values to documents.

Supported triggers

You set barcode triggers, also called conditions, for CaptureNow to locate and parse a barcode. For example, you might configure CaptureNow to parse a barcode that contains the value 1650498029802011 into three parts, and assign each part as a document property value. You might designate the first five digits as a document property value, the middle ten digits as a document property value, and the last digit as a document property value.

The following list describes the barcode triggers that CaptureNow supports.

<barcode position number>|<range of digits>

Locate the specified barcode position on the page and use the specified range of digits from the barcode. CaptureNow reads barcodes on a page from top to bottom and left to right.

Example

To locate the first (1) barcode on the page and use the first five (1-5) digits from the barcode, specify 1|1-5 To locate the first (1) barcode on the page and use the sixth through the fifteenth (6-15) digits from the barcode, specify 1|6-15 To locate the first (1) barcode on the page and use the sixteenth (16) digit from the barcode, specify 1|16

>=value

Locate the barcode value that is greater than or equal to the specified value.

Example

>=123456

>value

Locate the barcode value that is greater than the specified value.

Example

>123455

<=value

Locate the barcode value that is less than or equal to the specified value.

Example

<=1234560

<value

Locate the barcode value that is less than the specified value.

Example

<123459

between(first value,second value)

Locate the barcode value that resides between the specified values, where the first value is less than the target value and the second value is more than the target value.

Example

between(123456,123460)

length=

Locate the barcode value that has the specified number of digits.

Example

length=6

pattern=

Locate the barcode value that includes the specified pattern or digit. CaptureNow supports using asterisks (*) or question marks (?) as wildcard characters.

Example

pattern=10*pattern=t*ppattern=A?C Corporationpattern=Acme Corporation

range(first value,second value)

Locate the barcode value that resides in a range of values, where the first value is less than or equal to the target value and the second value is greater than or equal to the target value.

Example

range(123456,123460)

&

Locate the barcode value that meets the specified conditions.

Example

To locate the first barcode on a page that has a length of 6 digits, specify 1&length=6

Configure barcode options for batch scanning overview

To configure barcode options for batch scanning, complete the following steps.

Prerequisite You must perform this procedure on an ImageNow Client computer with a scanner is already installed and configured.

1. Enable barcode detection for scanning profiles.
2. In a capture profile, configure how to use barcodes to process a batch.
   - Enable barcodes for document properties in Batch mode.
   - Enable barcodes for batch separation.
   - Enable barcodes for batch grouping.

Enable barcode detection for scanning profiles

To enable Kofax or Pixel barcode detection in a scanning profile, complete the following steps.

Prerequisite Your scanner hardware and software must support image processing to use barcode detection. If the scanning profile does not already exist, you must create it before you begin this procedure.

1. On the **Perceptive Content** toolbar, click **Settings > Options**.
2. In the **ImageNowOptions** dialog box, perform the following substeps:
   1. In the left pane, click **Capture**.
   2. On the **General** tab, under **Scanning Profiles**, click **Manage Profile List**.
3. In the **Scanning Profile Manager** dialog box, select the scanning profile for which you want to enable barcode detection and click **Modify**.
4. In the **Scanning Profile** dialog box, on the **Properties** tab in the **DPI** box, select **300** for optimal barcode recognition.
5. Configure the barcode detection using one of the following options, depending on the situation:

Situation	Steps
Enable barcode detection in CaptureNow Adrenaline (Kofax)	1. On the **Properties** tab, in the **Sides** list, select either **Simplex** or **Duplex**. 2. On the **Advanced** tab, and under **Image Processing Filters**, select the **Barcode Detection** check box. 3. Double-click **Barcode Detection**. 4. In the **Bar Code Properties** dialog box, under **Recognition**, verify that the **Enable** check box is selected. 5. Select the **Learn** check box. 6. Under **Search Direction**, select the **0**, **90**,

Situation	Steps
	180, and **270** check boxes. 7. Under **Bar Code Algorithm**, verify that **Enhanced Bar Codes** is selected. 8. Under **Type**, select and add the barcode types.
Configure barcodes for a Simplex scanning profile in CaptureNow ISIS (Pixel)	1. On the **Properties** tab, in the **Sides** list, select **Simplex**. 2. On the **Image Processing** tab, next to **Front**, click **Modify**. 3. In the **Image Processing Configuration** dialog box, under **Available Filters**, click **Barcode Detection > Add**. 4. Under **Selected Filters**, click **Barcode Detection > Configure**. 5. In the **Barcode Detection - Properties** dialog box, under **Check the following symbologies**, select the barcode types. 6. Under **Orientation**, select the barcode orientations you want, and then verify that the **Decode Symbol** check box is selected and then click **OK** until you return to the **Scanning Profile** dialog box.
Configure barcodes for a Duplex scanning profile in CaptureNow ISIS (Pixel)	1. On the **Properties** tab, in the **Sides** list, select **Duplex**. 2. On the **Image Processing** tab, next to **Front**, click **Modify**. 3. In the **Image Processing Configuration** dialog box, under **Available Filters**, click **Barcode Detection > Add**. 4. Under **Selected Filters**, click **Barcode Detection > Configure**. 5. In the **Barcode Detection - Properties** dialog box, under **Symbologies To Check**, select the barcode types. 6. Under **Orientation**, select the barcode orientations you want, and then verify that the **Decode Symbol** check box is selected

Situation	Steps
	and then click **OK** until you return to the **Scanning Profile** dialog box. 7. Configure any additional barcode detection filters you need.

Note: The available options vary by scanner type. For detailed help, press the F1 key while in the **Bar Code Properties** dialog box.

6. Click **OK** until you return to the **Perceptive Content** toolbar.

Enable barcodes for batch grouping

CaptureNow provides batch grouping during the scanning process. CaptureNow starts a new batch when it detects a barcode, scans the specified increment of pages for a unique ID, or reaches the specified page limit for a batch. To enable batch grouping, complete the following steps.

Prerequisite Your scanner hardware and software must support barcode processing. If the Batch mode capture profile does not already exist, you must create it before you begin this procedure.

1. On the **Perceptive Content** toolbar, click **Capture > Manage Capture Profiles**.
2. In the **Capture Profiles** dialog box, select the capture profile for which you want to enable barcode grouping and click **Modify**.
3. In the capture profile, on the **Batch** tab, under **Barcode Grouping**, perform the following substeps:
   1. Select the **Enable** barcode grouping check box.
   2. Optional. In the **Page Limit** list, type or select the maximum number of pages to allow in a batch.
   3. In the **Trigger** box, specify a filter to identify a barcode when more than one barcode is detected.
4. On the **Document Keys** tab, perform the following substeps:
   1. Double-click a document property for which you want **CaptureNow** to include a unique ID for each batch.
   2. In the **Key Definition** dialog box, in the **Type** list, click **Unique ID**.
   3. In the **Increment** list, select when to start a new batch during the scanning process.
5. Click **OK** until you return to the **Perceptive Content** toolbar.

Enable barcodes for batch separation

To enable batch separation based on one or more barcodes detected during the scanning process, complete the following steps.

Prerequisite Your scanner hardware and software must support barcode processing. If the Batch mode capture profile does not already exist, you must create it before you begin this procedure.

1. On the **Perceptive Content** toolbar, click **Capture > Manage Capture Profiles**.

2. In the **Capture Profiles** dialog box, select the capture profile for which you want to enable barcode options and click **Modify**.
3. In the capture profile, on the **Batch** tab, under **Separator Sheets**, perform the following substeps:
   1. From the **Type** list, select **Barcode**.
   2. In the **Trigger** box, type a filter that a barcode must match before **Perceptive Content** starts a new batch.
   3. To keep a separator sheet that contains a barcode as part of the batch, clear the **Remove separator sheet** check box.
4. Click **OK** until you return to the **Perceptive Content** toolbar.

Enable barcodes for document properties in Batch mode

CaptureNow can detect one or more barcodes during the scanning process, and assign barcode data to specified document property values. To enable CaptureNow to assign barcode data to document property values during batch capture, complete the following steps.

Prerequisite If the capture profile does not already exist, you must create it before you begin this procedure.

1. On the **Perceptive Content** toolbar, click **Capture > Manage Capture Profiles**.
2. In the **Capture Profiles** dialog box, select the capture profile for which you want to enable barcode options and click **Modify**.
3. In the capture profile, on the **Document Keys** tab, perform the following substeps:
   1. Double-click a property for which you want to assign barcode data.
   2. In the **Key Definition** dialog box, in the **Type** list, select **Barcode**.
   3. In the **Value** box, specify a filter to identify a barcode and to optionally parse the barcode data.

      Example If a page includes only one barcode and you do not want to parse barcode data, type `1`. For additional details, refer to "Barcode triggers in CaptureNow."
   4. Click **OK**.
4. Repeat the previous substeps for each document property for which you want to assign barcode data.
5. Click **OK** until you return to the **Perceptive Content** toolbar.

Supported barcode types

The following list details the supported barcode types. Each of the listed Perceptive Software products requires a separate license. For optimal barcode recognition, we recommend a 10 point, Courier font and 300 DPI (Dots Per Inch). An asterisk denotes that a barcode is two dimensional.

CaptureNow - Adrenaline

- Aztec*
- Codabar
- Code 128
- Code 39 (3 of 9)

- Code 93
- DataMatrix*
- EAN-8
- EAN-13
- Interleaved 2 of 5
- Linear 2 of 5
- Maxicode*
- PDF 417*
- Postnet
- QR Code*
- UPC-A
- UPC-E

CaptureNow - File with IP

- Addon-2
- Addon-5
- Australian Post
- BCD Matrix
- Codabar
- Code 128
- Code 32
- Code 93
- Datalogic 2 of 5
- DataMatrix*
- EAN-8
- EAN-13
- Interleaved 2 of 5
- Intelligent Mail
- Invert 2 of 5
- Matrix 2 of 5
- PDF 417*
- Postnet
- QR Code*
- Royal Post
- UCC/EAN-128 (GS1-128)
- UPC-A
- UPC-E

CaptureNow - ISIS

- Addon-2
- Addon-5
- Codabar
- Code 128
- Code 39 (3 of 9)
- Code 93
- EAN-8
- EAN-13
- Interleaved 2 of 5
- UPC-A
- UPC-E

CaptureNow - TWAIN

- Addon-2
- Addon-5
- Codabar
- Code 128
- Code 39 (3 of 9)
- Code 93
- EAN-8
- EAN-13
- Interleaved 2 of 5
- UPC-A
- UPC-E

DataCapture

- Codabar
- Code 128
- Code 39 without a start and stop character
- Code 39 (3 of 9)
- Code 39 with check digit
- Code 93
- EAN-8
- EAN-13
- Industrial 2 of 5
- Interleaved 2 of 5
- Interleaved 2 of 5 with check digit
- PDF 417*
- UCC/EAN-128 (GS1-128)
- UPC-A
- UPC-E

Fax Agent

- Codabar
- Code 128
- Code 39 (3 of 9)
- Code 93
- EAN-8
- EAN-13
- EAN with 2-digit or 5-digit supplement
- UPC-A
- UPC-E

Recognition Agent

- Airline 2 of 5
- Aztec*
- Codabar
- Codablock A*
-
- Code 11
- Code 128
- Code 39 Full ASCII
- Composite
- Code 39 (3 of 9)
- Code 39 with check digit
- Code 93
- DataMatrix*
- EAN-8
- EAN-13
- EAN with 2-digit or 5-digit supplement
- Hong Kong 2 of 5
- IATA 2 of 5
- Industrial 2 of 5
- Interleaved 2 of 5
- Interleaved 2 of 5 with check digit
- Maxicode*
- MicroPDF417*
- MSI Plessey
- NEC 2 of 5
- PDF 417*
- Pharmacode
- Postnet
- QR Code*
- Reduced Space
- Standard 2 of 5
- Telepen
- Trioptic Code 39
- UCC/EAN-128 (GS1-128)
- UPC/EAN/JAN
- UPC-A

- UPC-E

Patchcodes

About using patchcodes with CaptureNow

A patchcode is used to create a new batch when it is detected by the scanner.

Patchcodes are similar to barcodes in that they are used to further simplify the task of scanning and organizing documents. Each time a patchcode is detected, a new batch is created for the documents that are scanned after it. All newly scanned documents are placed in the new batch until scanning finishes or another patchcode is detected.

Adjust the patchcode offset

The option to adjust the patchcode offset applies only to Kofax scanning drivers. The Left Offset to Center of Patch Code setting is a measurement in inches from the left edge of the page that defines a point that falls near the center of the patchcode. The offset value allows the patchcode detection feature to quickly locate the patchcode on the page. This offset can be any value between 0 and the maximum page width, in inches. A value of 0 specifies searching anywhere in the horizontal direction for a patchcode. To adjust the offset value for a patchcode, complete the following steps.

Prerequisite If the scanning profile does not already exist, you must create it before you begin this procedure.

1. On the **Perceptive Content** toolbar, click **Settings > Options**.
2. In the **ImageNowOptions** dialog box, in the left pane, click **Capture**.
3. On the **General** tab, under **Scanning Profiles**, click **Manage Profile** List.
4. In the **Scanning Profile Manager** dialog box, select the scanning profile and click **Modify**.
5. In the **Scanning Profile** dialog box, on the **Advanced** tab, under **Image Processing Filters**, double-click **Patchcode Detection**.
6. In the **Patch Code Properties (Advanced)** dialog box, select the **Enable** check box.
7. In the **Left Offset to Center of Patch Code (in)** box, type or select the number of inches the patchcode is offset from the left edge of the page. If you are unsure of this setting, leave this set to zero.
8. Click **OK** until you close the **Scanning Profile Manager** dialog box.

Enable patchcode detection for a scanning profile

To enable Pixel or Kofax patchcode detection in a scanning profile, complete the following steps. When you use Kofax drivers, patchcodes are only detected on the front side of a page.

1. On the **Perceptive Content** toolbar, click **Settings > Options**.
2. In the **ImageNowOptions** dialog box, in the left pane, click **Capture**.
3. On the **General** tab, under **Scanning Profiles**, click **Manage Profile List**.
4. In the **Scanning Profile Manager** dialog box, select the scanning profile, click **Modify**.

5. In the **Scanning Profile** dialog box, on the **Properties** tab, for optimal patchcode recognition. In the **DPI** box, type `240`.
6. Do one of the following action depending on the situation:

Situation	Steps
Configure patchcodes for a Kofax duplex scanning profile	1. In the **Sides** list, select **Duplex**. 2. On the **Advanced** tab, and under Perceptive Content**Processing Filters**, select the **Border Removal** and **Patchcode Detection** check boxes.
Configure patchcodes for a Kofax simplex scanning profile	1. In the **Sides** list, select **Simplex**. 2. On the **Advanced** tab, and under Perceptive Content**Processing Filters**, select the **Patchcode Detection** check box.
Configure patchcodes for a Pixel duplex scanning profile	1. In the **Sides** list, select **Duplex**. 2. On the **Image Processing** tab, next to **Front**, click **Modify**. 3. In the **Image Processing Configuration**dialog box, under **Available Filters**, hold down the `CTRL` key and select **Blank Page Detection**, **Border Removal**, **Patchcode Detection**. 4. Click **Add**.
Configure patchcodes for a Pixel simplex scanning profile	1. In the **Sides** list, select **Simplex**. 2. On the **Image Processing** tab, next to **Front**, click **Modify**. 3. In the **Image Processing Configuration** dialog box, under **Available Filters**, click **Patchcode Detection > Add**.

7. Click **OK** until you return to the **Perceptive Content** toolbar.

Obtain patchcodes for CaptureNow

To download the *Patch Codes.pdf* file, complete the following steps.

For more information, refer to "Patchcode types for CaptureNow" or download the more detailed *Patch Codes.pdf* file from the Customer Portal.

1. In the **Customer Portal**, on the **Downloads** tab filter the download options for **ImageNow Client**.
2. Search for `Patch Codes`.

3. Save the *Patch Codes.pdf* file where you can easily access it.

Next Print the *Patchcodes.pdf* file and provide it to users that need to scan multiple batches at the same time, designating each new batch with a patchcode.

Patchcode types for CaptureNow

CaptureNow supports six patchcode type patterns. Devices configured to use Kofax drivers recognize all six patterns. Pixel enabled devices recognize patterns II, III, and T.

- Perceptive Content Patch I Header
- Perceptive Content Patch II Header
- Perceptive Content Patch III Header
- Perceptive Content Patch IV Header
- Perceptive Content Patch T Header

Scan batches using patchcodes

Each time Perceptive Content detects a patchcode, it creates a new batch for the pages scanned after the patchcode. This enables you to scan multiple batches at the same time while Perceptive Content places pages in the desired batch. To scan batches using patchcode separator sheets, complete the following steps.

Prerequisite This procedure requires a scanning workstation configured for Batch mode and Scanner source, a capture profile and scanning profile with patchcode detection enabled, and a printed patchcode separator sheet that provides a patchcode positioned horizontally on the front-side of the page, that it is at least 0.20 inches from the leading edge of the page, and does not extend 3.75 inches from the leading edge of the page.

1. At the scanning workstation, place a patchcode separator sheet on top of each group of pages that you want to scan as a new batch.
2. Insert the pages into the scanner's feeder with each patchcode separator sheet on the leading edge of the paper.

   This could vary based on scanner type.
3. On the **Perceptive Content** toolbar, click the arrow next to the **Capture** button and select a capture profile set to Scanner source and Batch mode.
4. If the **Supply Group Information** dialog box displays, Select or type values for **Prep User**, **Prep Date**, and **Pages** to show which user captured the batch and when, and to validate the page count.
5. If the **Batch Report** dialog box displays, click **OK**.

Next Quality assure the batch and assign property values.

Imprinter

Configure CaptureNow Imprinter overview

The CaptureNow Imprinter feature enables the user to print a string of data onto the front or back of the original scanned document. It also allows CaptureNow to populate the imprinter value in a document property assigned to the image. To configure the CaptureNow Imprinter feature, complete the following sequence of procedures on the ImageNow Client computer.

Prerequisite This procedure requires that the scanner and imprinter hardware is already installed and configured.

1. Enable CaptureNow Imprinter to work with your scanning device and **CaptureNow**.
2. Optional. Configure any additional Imprinter settings.
3. Populate a document property with an imprinter value.

Imprinter settings

The following settings are available when configuring Imprinter with a Pixel or Kofax device.

Pixel settings

Bold

Indicates that the string will be printed in bold font.

Counter Step

Select the method used to modify the imprinter counter after each page scanned. There are several options:

- Decrease by 2
- Decrease by 1
- Do not change
- Increase by 1
- Increase by 2

If you select "Do not change," the imprinter counter will only increment when a new scan event is performed (every time you click the Capture icon). When using this method, the number can only increment by one.

Direction

Indicates which direction the string will imprinted, going up or going down.

Enable Imprinter

Select this setting to enable imprinting.

Imprinter String

Specifies the text to be output by the imprinter. This alphanumeric string can be a maximum of 43 characters when Use Extended Counter setting is selected, or 40 characters otherwise. The string can consist of the following:

- <space>
- 0-9
- _/\#.][()=+<>
- A-Z
- A-z

The "%" is a special character that can be used to append an optional counter to the end of the imprinter string. This character can only be used at the end of the string. If present, it will be expanded to a 5 or 8-digit number.

Other device drivers may use a character other than "%" to indicate the use of a counter.

Initial Count

Specifies the counters starting number. Only used if the "%" specifier is included in the imprinter string.

Orientation

Indicates the orientation of the imprinted string. Options are "Portrait" and "Landscape." The orientation indicates the direction that each individual character is printed.

Use Extended Counter

Determines if the counter string will be five or eight characters. If selected, the counter will have a length of eight digits, and can have a value between 0 and 16,777,215. If not selected, the counter will have a length of five digits, and can have a value between 0 and 99,999.

Y Offset

Indicates the number of pixels that the imprinted string will be offset from the edge of the original document.

Kofax settings

Digit

Type or select the number of digits you want the incrementing string to contain (1-8).

Enable Automatic Annotation

This functionality is not supported within Perceptive Content.

Enable Automatic Endorser

Enables the imprinter. You must have this selected in order to use the imprinter.

Inc Off

Select this setting to turn off the counter increment feature.

Inc On Page

Select this setting to set the number of pages that will be scanned before the string increments. In some cases, you may want to assign the same number to each page within a batch of documents, and have the string increment only when a new scan event is performed (every time you click the Capture icon). To do this, set Inc On Page higher than the number of pages that any single batch of documents would ever contain.

Inc On Patch

Select this setting to set the string to increment only when a specific patch code is detected. In the Inc On Patch list, select the specific patch code that will be used to trigger the increment.

Increment Value

Type or select the value by which you want the incrementing string to increase on each subsequent page.

Left (pixel)

Type or select the number of pixels that you want the imprinted string to be offset from the left edge of the page.

Depending on the type of imprinter device you are using, this setting may appear dimmed and unavailable.

Orientation

Select the orientation of the imprinted string that you want. The rotation indicates the direction that each individual character will be printed.

Prefix

Type a static text string that you want to precede the numbered string printed by the imprinter. The default text string "Kofax" can be deleted and replaced with your own text string.

Reset Off

Select this setting to turn off the counter reset feature.

Reset On Page

Select this setting to set the number of pages that will be scanned before the incrementing string resets to the value you set for Reset Value.

Reset On Patch

Select this setting to set the incrementing string to reset to the value you set for Reset Value only when a specific patch code is detected. In the Reset On Patch list, select the specific patch code that will be used to trigger the reset.

Reset Value

Type or select the number to which you want the incrementing string to reset. The Counter Reset options will appear dimmed and unavailable if the Inc Off option is selected.

Skip First Patch Code

Select this setting if you want the first patch code encountered by the imprinter to be ignored. This setting is only enabled if you select Inc On Patch.

Starting Number

Type or select the number you want the incrementing string to begin with. The Counter Start settings will appear dimmed and unavailable if the Inc Off option is selected.

Top (pixel)

Type or select the number of pixels that you want the imprinted string to be offset from the top of the page.

Type

Select the font size that you want for the imprinted string.

What is Imprinter?

The Imprinter feature allows you to use imprinter hardware connected to your scanner to print a string of data onto the front or back of the original scanned document.

Depending on the device, printing occurs immediately before or immediately after you scan a document. When creating or using a scanning profile, you can define the type of value you want imprinted. Your options include printing a static string on every document, an incrementing number, or a combination of both. Using the imprinter functionality allows you to capture and re-use the string that was imprinted on the original paper document as an index key. By doing so, you would be able to look at a document and then locate the original paper document using the information the imprinted string contains.

The Imprinter feature can be driven using either a Kofax or Pixel scanner driver, but will only work with scanners that support imprinters.

Predefined Lists

Create a predefined list in a capture profile

To create a predefined list of values for a document property in a capture profile, complete the following steps.

1. On the **Perceptive Content** toolbar, click **Capture > Manage Capture Profiles**.

2. In the **Capture Profiles** dialog box, click **Create**.
3. In the **New Capture Profile** dialog box, on the **Document Keys** tab, double-click the document property for which you want to create a predefined list.
4. In the **Key Definition** dialog box, in the **Type** list, select **Predefined List - Server**.
5. In the **Value** list, select **Edit List**.
6. In the **Predefined Lists** dialog box, click **New**, and type a name for the list.
7. To add the list description and list member values, complete the following substeps.
    1. Select the list name and click **Modify**.
    2. In the **Edit Predefined List** dialog box, on the **General** tab, in the **Description** box, type a description of the list.
    3. On the **List Members** tab, in the **Name** box, type the first value to appear in the list.
    4. Click **Add**.
    5. Repeat the previous substeps until you add all list member values.

    Note: Click on the **Name** header to sort list member values in ascending or descending order.
8. Click **OK**.

Delete a predefined list in a capture profile

To delete a predefined list assigned to a document property in a capture profile, complete the following steps.

1. On the **Perceptive Content** toolbar, click **Capture > Manage Capture Profiles**.
2. In the **Capture Profiles** dialog box, select the capture profile and click **Modify**.
3. In the capture profile, on the **Document Keys** tab, double-click the document property that contains the predefined list you want to delete.
4. In the **Key Definition** dialog box, in the **Value** list, select **Edit List**.
5. In the **Predefined Lists** dialog box, select the predefined list and click **Delete**.
6. In the confirmation dialog box, click **Yes**.

Modify or rename a predefined list

To modify a predefined list assigned to a document property in a capture profile, complete the following steps.

1. On the **Perceptive Content** toolbar, click **Capture > Manage Capture Profiles**.
2. In the **Capture Profiles** dialog box, select the capture profile and click **Modify**.
3. In the capture profile dialog box, on the **Document Keys** tab, double-click the document property that contains the list you want to modify.
4. In the **Key Definition** dialog box, in the **Type** list, verify that **Predefined List - Server** is selected.
5. In the **Value** list, select **Edit List**.
6. In the **Predefined Lists** dialog box, select the list you want to modify, and click **Modify**.
7. Optional. On the **General** tab, modify the name or the description of the predefined list.
8. Optional. To add or modify list member values, on the **List Members** tab, perform any of the following

actions.

- To add a list member, in the **Name** box, type a list member value, and then click **Add**.
- To change the location of a list member value, select the value, and then click **Move Up** or **Move Down**.
- To remove a value from the list, select the value, and then click **Remove**.
- To sort list member values in ascending or descending order, click the **Name** header.

9. Click **OK**.

Profiles

About distributing capture and scanning profiles

If you administer a client-based capture profile from a central location, you can use ImageNow Server to distribute the profile to multiple ImageNow Client workstations using the distribution methods of User, Group, or Machine.

You might need to send periodic updates to capture profiles and will need to make those settings available on every scanning computer. While users can still add or modify capture profiles if they have the necessary permissions, you can overwrite all the local settings with a new set of capture profiles. After you create your master configuration files, you distribute them to one or more target computers, and as a result, every new Windows User account that logs on to Perceptive Content on the target computer acquires the settings from the master configuration files. However, if a user later modifies the capture profiles, scanning profiles, or configuration settings, those changes are not distributed to other users. Assigning master files removes any previous settings in the Windows user configuration folders of the affected users.

Distributing capture and scanning profiles overwrites all previous capture and scanning profiles and overwrites exiting capture and scanning profiles only when the ImageNow Server is greater than the version of the ImageNow Client. Users of ImageNow Client can modify capture and scanning profiles after the first capture and scanning profile is downloaded on the local computer. Modified profiles are not updated on ImageNow Server automatically.

Define scanning profile options

To define scanning profile options, complete the following steps.

1. On the **Perceptive Content** toolbar, click **Capture > Manage Capture Profiles**.
2. In the **Capture Profiles** dialog box, select the capture profile and click **Modify**.
3. In the ***<Capture Profile Name>*** dialog box, on the **Scanner** tab, in the **Scanning** list, select **Edit Scanning Profiles**.
4. In the **Scanning Profile Manager** dialog box, select the profile you want, and click **Modify**.
5. Optional. On the **Properties** tab, choose the property options to include with your scanning profile.
6. Optional. On the **Image Processing** tab, to modify filters, click **Modify**. In the **Image Processing Configuration box**, select a filter and add it to the **Selected Filters** pane. Once added, you can configure the filter, move it up or down, or remove it.
7. Click **OK** to save the changes and exit each dialog box. In the ***<Capture Profile Name>*** dialog box, click **OK** to return to the **Capture Profiles** dialog box.

Distribute a client-based capture or scanning profile

Distributing a client-based capture or scanning profile to multiple ImageNow Client workstations eliminates the need to manually create or modify the profiles on each workstation. To use ImageNow Server, complete the following steps.

Prerequisite You must configure a set of scanning workstations and create a master capture or scanning profile.

1. On the **ImageNow Server** computer, in the *[drive:]***\inserver** directory, create a folder named *Profiles*.
2. In the *[drive:]***\inserver***Profiles* directory, create a folder for each profile that you want to distribute or update.

   For example, *ScanningProfiles*, *ReviewProfiles*, and *ViewProfiles*.
3. On the originating computer, in **ImageNow Client**, create the capture and scanning profiles.
4. Close **ImageNow Client**.
5. Navigate to your ImageNow workpath and perform the following substeps. Depending on your configuration, your work path may be *%appdata%\ImageNow*, *\Documents and Settings\<username>*, or a location you configured in the inowsystem.ini file.
   1. In a text editor such as Notepad, open the *inscan.xml* and *indevice.xml* files.
   2. In each file, specify the following parameters where the <*name*> value matches a folder name you created earlier:

      ```
      <versionInfo>

         <name>ScanningProfiles</name>

         <number>1</number>

      </versionInfo>
      ```
   3. Save and close the *inscan.xml* and *indevice.xml* files, and copy them to the corresponding folder you created.
6. Open the **ImageNow Server** computer, in the *[drive:]***\inserver\etc** directory.
7. Create a file named scan.ini and add the following lines:

   ```
   ;-------------beginning of file----------

   [General]

   //0 - User

   //1 - Group

   //2 - Machine

   LookupMode=1

   [Machine]

   SJones = ScanningHR

   TSmith = ScanningAP

   [Users]
   ```

```
SJones = ScanningAP

TSmith = ScanningAP

[Groups]

AP Scanning = ScanningAP

HR Scanning = ScanningHR

;-------------end of file----------
```

Note: When you create the *scan.ini* file, you must choose one of the following distribution methods: User, Group, or Machine. Only one distribution method can be used at a time. Additionally, you need to order the list of groups based on the capture profile assignment priority. For more information about distributing profiles to groups, see Example 1 and Example 2 below.

Example 1: User A is a member of the following ImageNow groups: Reviewing, Scanning, and Viewing. You want to assign the "Scanning" group capture profiles to User A. To configure the groups in the [Groups] list, as shown here:

```
[Groups]

ScanningProfiles

ReviewProfiles

ViewProfiles
```

ImageNow evaluates the [Groups] list based on the order. In Example1, because User A is a member of the "Scanning" group, the "Scanning Profiles" profile is assigned to User A. Perceptive Content groups in the list.

Example 2: User B is a member of the following groups: Reviewing and Viewing. Using the *scan.ini* file in Example1, Perceptive Contentfirst checks to see if User B is a member of the "Scanning" group. Since User B is not a member of this group, Perceptive Content continues through the list. Because User B is a member of the "Reviewing" group, the second group in the [Groups] list, User B receives the "`Review Profiles.`" Although User A and User B are both members of the "Viewing" group, they do not receive the "View Profiles" because the "Scanning" and "Reviewing" group profiles are listed first.

Note: When entering the machine name in *scan.ini*, do not include the domain name (such as PC01.psinet.com). Domain names may prevent capture profiles from being properly distributed.

8. To distribute the *indevice.xml* and *inscan.xml* files, under **[General]**, assign one of the following distribution methods:
   - To distribute the files to the users specified in the [Users] section, for the **LookupMode** statement, specify `0`.
   - To distribute the files to the groups of users specified in the [Groups] section, for the **LookupMode** statement, specify `1`.

- To distribute the files to the computers listed in the [Machines] section, for the **LookupMode** statement, specify `2`.

9. Save and close the *scan.ini* file.
10. On the **ImageNow Server** computer, copy the files you added to the *[drive:]**inserver**\Profiles* directory and place them in the *\Documents and Settings\<username>* directory of each target computer.
11. To modify an existing distribution profile, increase the **<number>** value in the header areas of the *inscan.xml* and *indevice.xml* files located in the in the *[drive:]**inserver**\Profiles* directory.

    Users receive the updates after their next login.

What is a capture profile?

A capture profile stores the settings you define to capture files into Perceptive Content, making capture a simple task for your users.

A capture profile identifies information such as the capture source, the workflow queue to which you route captured documents, and additional image processing that you want Perceptive Content to complete.

Server-based capture profiles exist for Import Agent, Fax Agent, SAP ArchiveLink, iScript, and scanners.

Client-based capture profiles exist for CaptureNow and offer capture of documents from the File, Scanner, and ImageNow Printer sources. You can use Perceptive Content Server to distribute client-based capture profiles.

Client-Based Capture Profiles

Copy a client-based capture profile

To quickly create a new capture profile, you can base it on an existing profile. To copy a client-based capture profile for Single, Batch, or Package Mode, complete the following steps.

1. On the **Perceptive Content** toolbar, click **Capture > Manage Capture Profiles**.
2. In the **Capture Profiles** dialog box, select the profile you want to copy.
3. Click **Copy**.

Create a Batch mode capture profile from File source overview

A Batch mode capture profile set to File source instructs CaptureNow to import one or more electronic files and store them in a batch. To create a capture profile set to Batch mode and File source, complete the following sequence of procedures.

1. Create a client-based capture profile.
2. Define file location and image processing options.
3. Define batch processing options.
4. Define capture profile document property options.

Create a Batch mode capture profile from ImageNow Printer source overview

A Batch mode capture profile set to ImageNow Printer source prints an electronic file from an application, such as Microsoft Excel, into a batch. To create a capture profile set to Batch mode and ImageNow Printer source, complete the following sequence of procedures.

1. Create a client-based capture profile.
2. Define batch processing options.
3. Define capture profile document property options.

Create a Batch mode capture profile from Scanner source overview

A Batch mode capture profile set to Scanner source instructs CaptureNow to scan one or more pages and store them as a batch. To create a capture profile set to Single mode and Scanner source, complete the following sequence of procedures.

1. Create a client-based capture profile.
2. Define scanning profile options.
3. Define batch processing options.
4. Define capture profile document property options.

Create a Package Mode capture profile from File source overview

A Package Mode capture profile set to File source instructs CaptureNow to import one or more electronic files into a package. To create a capture profile set to Package Mode and File source, complete the following sequence of procedures.

1. Create a client-based capture profile.
2. Define file location and image processing options.

Create a Package Mode capture profile from Scanner source overview

A Package Mode capture profile set to Scanner source instructs CaptureNow to scan one or more pages into a package. In the profile, you must select or create a scanning profile. To create a capture profile set to Package Mode and Scanner source, complete the following sequence of procedures.

1. Create a client-based capture profile.
2. Define scanning profile options.

Create a Single mode capture profile from File source overview

A Single mode capture profile set to File source instructs CaptureNow to import one or more electronic files and store them as a single document. To create a capture profile set to Single mode and File source, complete the following sequence of procedures.

1. Create a client-based capture profile.
2. Define file location and image processing options.

3. Define an application plan for a capture profile.
4. Define capture profile document property options.

Create a Single mode capture profile from ImageNow Printer source overview

A Single mode capture profile set to ImageNow Printer source prints an electronic file from an application, such as Microsoft Excel, into a document. To create a capture profile set to Single mode and ImageNow Printer source, complete the following sequence of procedures.

1. Create a client-based capture profile.
2. Define an application plan for a capture profile.
3. Define capture profile document property options.

Create a Single mode capture profile from Scanner source overview

A Single mode capture profile set to Scanner source instructs CaptureNow to scan one or more pages and store them as a single document. To create a capture profile set to Single mode and Scanner source, complete the following sequence of procedures.

1. Create a scanning profile.
2. Create a client-based capture profile.
3. Define scanning profile options.
4. Define an application plan for a capture profile.
5. Define capture profile document property options.

Delete a client-based capture profile

To delete a client-based capture profile for Single, Batch, or Package Mode, complete the following steps.

1. On the **Perceptive Content** toolbar, click **Capture > Manage Capture Profiles**.
2. In the **Capture Profiles** dialog box, select the profile you want to delete.
3. Click **Delete**.
4. In the confirmation prompt, click **Yes**.

Import a client-based capture profile on a non-scanning computer

Importing a capture profile from one workstation to another workstation eliminates the need to manually configure the same settings on multiple workstations. To import a client-based capture profile for Single, Batch, or Package mode, complete one of the following procedures.

Prerequisite You must have a scanner installed on the target workstation and create at least one scanning profile on the target computer. If your solution includes Kofax Virtual ReScan (VRS) software, you must create the correct source in the Scanning Configuration Utility for VRS. Ensure that you upload enough CaptureNow licenses on the ImageNow Server for your scanners.

1. On the originating computer, copy the *inscan.xml* file to a location from where you can access it from the target computer.

2. On the target computer, start **Perceptive Content**.
3. On the **Perceptive Content** toolbar, click the arrow next to the **Capture** button and select **Manage Capture Profiles**.
4. In the **Capture Profiles** dialog box, click **Import**.
5. In the wizard, in the **Source** list, select **Perceptive Content** Capture Profile (local).
6. For **Location**, browse to the *inscan.xml* file that you copied from the originating computer and open it.
7. Click **Next**.
8. Select the check box next to the capture profile you want to import.
9. Click **Finish**.

Import a client-based capture profile on a scanning computer

Importing a capture profile from one workstation to another workstation eliminates the need to manually configure the same settings on multiple workstations. To import a client-based capture profile for Single, Batch, or Package Mode, complete one of the following procedures.

Prerequisite You must have a scanner installed on the target workstation and create at least one scanning profile on the target computer. If your solution includes Kofax Virtual ReScan (VRS) software, you must create the correct source in the Scanning Configuration Utility for VRS. Ensure that you upload enough CaptureNow licenses on the ImageNow Server for your scanners.

1. On the originating computer, open the user configuration folder and copy the *inscan.xml file* to a location from where you can access it from the target computer.
2. On the target computer, on the **Perceptive Content** toolbar, click **Capture > Manage Capture Profiles**.
3. In the **Capture Profiles** dialog box, click **Import**.

   To import a profile, the user logged in to the local computer must have the Write permission for the *C:\Documents and Settings\All Users\Application Data\ImageNow\etc* directory.
4. In the wizard, in the **Source** list, select **Perceptive ContentCapture Profile**.
5. For **Location**, browse to the *inscan.xml* file that you copied from the originating computer and open it.
6. Click **Next**. This displays the capture profiles available in the *inscan.xml* file you selected.
7. Select the check box next to the capture profile you want to import.
8. On the same row, click **<None>** and select the scanning profile to use with the capture profile you selected.
9. Click **Finish**.

Modify a client-based capture profile

To modify a client-based capture profile for Single, Batch, or Package modes, complete the following steps.

1. On the **Perceptive ContentPerceptive Content** toolbar, click **Capture > Manage Capture Profiles**.
2. In the **Capture Profiles** dialog box, select the profile you want to modify.
3. Click **Modify**.

4. Make any needed changes.
5. Click **OK**.

Reorganize client-based capture profiles

The order in which you store your client-based capture profiles in the Capture Profiles dialog box determines their order on the Capture sub-menu on the Perceptive Content toolbar. To change the order of your client-based capture profiles for Single, Batch, and Package Mode, complete the following steps.

1. On the **Perceptive Content** toolbar, click **Capture > Manage Capture Profiles**.
2. In the **Capture Profiles** dialog box, select a profile and click **Move Up** or **Move Down**.
3. Click **Close**.

Roll back a client-based capture profile to the server version

To roll back a client-based capture profile to the server version, complete the following steps.

1. Exit **ImageNow Client**.
2. In the *C:\Documents and Settings* directory, locate the user configuration folder associated with the capture profile you wish to roll back.
3. In the **Perceptive Content user configuration** folder, open the *inscan.xml* and *indevice.xml* files.
4. Change the **<number>** value to a previous version, as shown in the following example:

   Example
   ```
   <versionInfo><name>ScanningAP</name><number>4</number></versionInfo>
   ```
5. Save and close the *inscan.xml* and *indevice.xml* files.
6. Start **Perceptive Content** and verify that the capture and scanning profiles have loaded from the**ImageNow Server**.

Server-Based Capture Profiles

Copy a server-based capture profile

To quickly create a new capture profile, you can base it on an existing profile. To copy a server-based capture profile, complete the following steps.

1. In **Management Console**, in the left pane, under **Select Department**, select a department from the list.
2. Click **Capture**.
3. In the right pane, on the **Capture Profile** tab, select the capture profile you want to copy.
4. Click **Copy**.

Create a Fax Agent capture profile for a document

Fax Agent enables you to process incoming faxes directly into a document. To configure a capture profile for Fax Agent, complete the following steps.

Prerequisite Before you begin this procedure, you must install Fax Agent, configure the inserverFax.ini file to support the use of a Fax Agentcapture profile, and create a Fax Agent application plan for a document.

1. In **Management Console**, in the left pane, under **Select Department**, select a department from the list.
2. Click **Capture**.
3. On the **Capture Profile** tab, click **New > Fax Agent**.
4. In the **Capture Profile Definition** wizard, on the **Capture Profile Content Type** page, select **Documents**.
5. On the **Capture Profile Information** page, complete the following substeps.
   1. Type name and optional description for the capture profile.
   2. Verify that the **Profile is active** check box is selected.
   3. Click **Next**.
6. On the **Capture Profile Options** page, complete the following substeps.
   1. In the **Application plan** list, select the **Fax Agent** application plan that you want to associate with this capture profile.
   2. Optional. In the **Workflow process** list, select the workflow process to which you want to route the new documents.
   3. If you selected a workflow process, in the **Workflow queue list**, select the workflow queue to where you want to route the new documents.
   4. Optional. To submit documents to **Recognition Agent** for bar code scanning, select the **Submit to Content Server** check box.
   5. Optional. To add documents to version control, select the **Submit to version control** check box.
   6. Click **Next**.
7. On the **Capture Profile Verification** page, review your capture profile configuration settings and complete one of the following actions.
   - To modify a configuration setting, click **Back** and make any needed changes.
   - To keep the configuration settings, click **Finish**.

Create an external interface capture profile for a document

You use an external interface capture profile with external interfaces such as iScript or Integration Server. To create an external interface capture profile, complete the following steps.

1. In **Management Console**, in the left pane, under **Select Department**, select a department from the list.
2. Click **Capture**.
3. In the right pane, on the **Capture Profile** tab, click **New > External Interface**.

4. If the **Capture Profile Content Type** page appears, select **Document**, and then click **Next**.
5. On the **Capture Profile Information** page, perform the following substeps.
   1. Type a name and optional description.
   2. Verify that the **Profile is active** check box is selected.
   3. Click **Next**.
6. In the **Capture Profile Options** page, complete the following substeps.
   1. In the **Application plan** list, select the External application plan that you want to associate with this capture profile.
   2. Optional. In the **Workflow process** list, select the workflow process to which you want to route the new items.
   3. If you selected a workflow process, in the **Workflow queue** list, select the workflow queue to which you want to route the new items.
   4. Optional. To submit items to **Recognition Agent** for bar code scanning, select the **Submit to Content Server** check box.
   5. Optional. To add items to version control, select the **Submit to version control** check box.
   6. Click **Next**.
7. In the **Capture Profile Verification** page, review your capture profile configuration settings and perform one of the following actions.
   - To modify a configuration setting, click **Back** and make any needed changes.
   - To keep the configuration settings, click **Finish**.

Create an Import Agent capture profile for a document

An Import Agent capture profile stores the settings you define for Import Agent to import files into a document. To create an Import Agent capture profile, complete the following steps.

An Import Agent capture profile is one component required to define an Import Agent Capture Profile mode.

1. In **Management Console**, in the left pane, under **Select Department**, select a department from the list.
2. Click **Capture**.
3. In the right pane, on the **Capture Profile** tab, click **New > Import Agent**.
4. In the **Capture Profile Definition** wizard, on the **Capture Profile Content Type** page, select **Document**.
5. On the **Capture Profile Information** page, complete the following substeps.
   1. Type a name and optional description for the capture profile.
   2. Verify that the **Profile is active** check box is selected.
   3. Click **Next**.
6. On the **Capture Profile Source** page, select one of the following options.
   - **Create a new source profile**.
   - **Select an existing source profile** and then choose a source profile from the list.
7. On the **Capture Profile Options** page, complete the following substeps.

1. In the **Application plan** list, select the **Import Agent** application plan that you want to associate with this capture profile.
2. Optional. In the **Workflow process** list, select the workflow process to which you want to route the new documents.
3. If you selected a workflow process, in the **Workflow queue** list, select the workflow queue to which you want to route the new documents.
4. Optional. To submit documents to **Recognition Agent** for bar code scanning, select the **Submit to Content Server** check box.
5. Optional. To add documents to version control, select the **Submit to version control** check box.

6. Click **Next**.

8. On the **Capture Profile Verification** page, review your capture profile configuration settings and complete one of the following actions.
   - To modify a configuration setting, click **Back** and make any needed changes.
   - To keep the configuration settings, click **Finish**.

Create an SAP ArchiveLink capture profile for a document

Perceptive Content Connector for SAP ArchiveLink is an extension that provides the functionality to upload metadata stored in Perceptive Content to SAP software. SAP uses this metadata to create financial accounting (FI) documents in your SAP application. To configure a capture profile for SAP ArchiveLink, complete the following steps.

Prerequisite Before you begin this procedure, you must install Perceptive Content Connector for SAP ArchiveLink and create an Interact application plan for a document.

1. In **Management Console**, in the left pane, under **Select Department**, select a department from the list.
2. Click **Capture**.
3. In the right pane, on the **Capture Profile** tab, click **New > SAP ArchiveLink**.
4. In the **Capture Profile Definition** wizard, on the **Capture Profile Content Type** page, select **Documents**.
5. On the **Capture Profile Information** page, complete the following substeps:
   1. In the **Name** box, type `SAP ArchiveLink`.

      Note: For a SAP ArchiveLink capture profile, the name must be SAP ArchiveLink.

   2. In the **Description** box, type a short profile description.
   3. Verify that the **Profile is active** check box is selected.
   4. Click **Next**.
6. On the **Capture Profile Options** page, complete the following substeps:
   1. In the **Application plan** list, select the Interact application plan that you want to associate with this capture profile.

2. Optional. In the **Workflow process** list, select the workflow process to which you want to route the new documents.
3. If you selected a workflow process, in the **Workflow queue** list, select the workflow queue to where you want to route the new documents.
4. Optional. To submit documents to **Recognition Agent**for bar code scanning, select the **Submit to Content Server** check box.
5. Optional. To add documents to version control, select the **Submit to version control** check box.
6. Click **Next**.

7. On the **Capture Profile Verification** page, review your capture profile configuration settings and complete one of the following actions:
   - To modify a configuration setting, click **Back** and make any needed changes.
   - To keep the configuration settings, click **Finish**.

Delete a server-based capture profile

To delete a server-based capture profile, complete the following steps.

1. In **Management Console**, in the left pane, under **Select Department**, select a department from the list.
2. Click **Capture**.
3. In the right pane, on the **Capture Profile** tab, click the capture profile you want to delete.
4. Click **Delete**.
5. In the confirmation prompt, click **Yes**.

Modify or rename a server-based capture profile for a document

To modify or change the name of a server-based capture profile that is used to capture files into a document, complete the following steps.

1. In **Management Console**, in the left pane, under **Select Department**, select a department from the list.
2. Click **Capture**.
3. In the right pane, on the **Capture Profile** tab, click the capture profile you want to modify and click **Modify**.
4. Optional. In the **Configure Capture Profile** dialog box, on the **General** tab, complete any of the following actions.
   - Modify the name and description.
   - To activate the profile, select the **Profile is active check** box.
   - To deactivate the profile, clear the **Profile is active** check box.
5. Optional. On the **Profile** tab, complete any of the following actions.
   - In the **Source type** list, select a new source.
   - If you selected Import Agent as the source type in the previous step, in the **Source profile** list, select a source profile.

- In the **Application plan** list, select a new application plan.
- In the **Workflow process** list, select a new workflow process.
- In the **Workflow queue** list, select a new workflow queue.
- Optional. Select or clear the check box for any of the listed options.

6. Verify the changes and click **OK**.

Source Profiles

Copy a source profile

To quickly create a new source profile, you can base it on an existing profile. To copy a source profile, complete the following steps.

1. In **Management Console**, in the left pane, under **Select Department**, select a department from the list.
2. Click **Capture**.
3. In the right pane, on the **Source Profile** tab, select the source profile you want to copy.
4. Click **Copy**.
5. In the **Copy** dialog, enter a name and click **OK**.

Create an Import Agent source profile

An Import Agent source profile stores information about the file types you want Import Agent to capture, the method to gather document property values, and whether to move or delete the source files after Import Agent captures them. To create a source profile for Import Agent, complete the following steps.

Prerequisite Import Agent is provided in the same installer as ImageNow Server, and this procedure assumes that Import Agent is already installed. An Import Agent source profile is one component required to configure Import Agent to capture files using Capture Profile mode.

1. In **Management Console**, in the left pane click **Capture**.
2. In the right pane, on the **Source Profile** tab, click **New**.
3. In the **Source Profile Definition** wizard, on the **Source Profile Information** page, perform the following substeps:
    1. In the **Name** box, type a unique profile name.
    2. In the **Description** box, type a short profile description.
    3. In the **Source** list, select **Import Agent**.
    4. Verify that the **Profile is active** check box is selected.
    5. Click **Next**.
4. On the **Import AgentMode** page, in the **Import mode** list, select one of the following modes and click **Next**:

Situation	Steps
Obtain document property values from a separate index file that your business application generates. Perceptive Content assigns the property values to an imported file. Import Agent monitors the directory you specify for the import.directory setting in the *inserverImp.ini*file for an index file and a file to import.	1. Select **Index File**. 2. On the Import Agent**Options** page, in the **Index file extension** box, enter the file extension of the index file that your business application generated. The default is *.inx*. 3. In the **Field delimiter** box, enter the delimiter character used in the index file to separate data. The default is ^. 4. To specify whether Import Agent deletes or moves files from the import directory after it stores the files in the OSM, under **After capture**, select **Delete files** or **Move files to the import complete directory**. 5. Optional. To separate pages in a TIFF file, resulting in a thumbnail for each page in viewer, select the **Split TIFFs into separate pages for thumbnails** check box. Otherwise, the viewer displays the TIFF file as one document that you can scroll through. 6. Optional. If you selected **Split TIFFs into separate pages for thumbnails**, and you want each page to exist as a separate document, select **Make each page a separate document**.
Obtain document property values from the name of the file it imports from the directory specified for the import.directory setting in the *inserverImp.ini* file. Perceptive Content can populate property values for the imported file based on literal or dynamic values defined in the *[Mode FILENAME]* group in the *inserverImp.ini* file.	1. Select **File name**. 2. To specify which file types to import from the import directory specified in the *inserverImp.ini* file, on the Import Agent**Options** page, under **Select what to import**, select **All file extensions** or **Limit file extensions to the following**. 3. To specify whether Import Agent deletes or moves files from the import directory after it stores the files in the OSM, under **After capture**, select **Delete files** or **Move files to the import complete directory**. 4. Optional. To separate pages in a TIFF file, resulting in a thumbnail for each page in

Situation	Steps
	viewer, select the **Split TIFFs into separate pages for thumbnails** check box. Otherwise, the viewer displays the TIFF file as one document that you can scroll through. 5. Optional. If you selected **Split TIFFs into separate pages for thumbnails**, and you want each page to exist as a separate document, select **Make each page a separate document**.

5. Click **Next**.
6. On the **Source Profile Verification** page, review your source profile configuration settings and perform one of the following actions:
   - To modify a configuration setting, click **Back** and make any needed changes.
   - To keep the configuration settings, click **Finish**.

Create an External Scanner source profile

Use this source profile when capturing images from an application that is utilizing Integration Server to connect with Perceptive Content. This source profile stores settings you configure for your scanner, and those become the default settings for any scan application you use. To create an External Scanner source profile, complete the following steps.

1. In **Management Console**, in the left pane, under **Select Department**, select a department from the list.
2. In the left pane, click **Capture**.
3. On the **Source Profile** tab, click **New**.
4. On the **Source Profile Content Type** page, select **Document** or **Record**, and then click **Next**.
5. On the **Source Profile Information** page, complete the following substeps, and then click **Next**.
   1. Under **Name**, type a name for the source profile.
   2. Under **Description**, type a description for the source profile.
   3. Under **Source**, select **External Scanner**.

   > **Note:** This source profile is active and available for use with scanner capture profiles. To deactivate this source profile, clear the **Profile is active** check box.

6. On the **Scanner Options** page, select scanner settings according to the options available for your scanner. To display additional settings for your scanner when you scan, select **Display property dialog at scan time**. Click **Next**.
7. On the **Scanner Barcode Options** page, enable barcode detection for each barcode type you want,

and then click **Next**.

> **Note: AutoBarcode** is enabled by default, and identifies all barcode types. To ensure that only specific barcode types are identified, you must disable **AutoBarcode**.

8. On the **Scanner Image Processing Options** page, select image processing options for your scanner, and then click **Next**.
9. On the **Source Profile Verification** page, verify that the source profile settings are accurate, and then click **Finish**.

Delete a source profile

To delete a source profile from your system, complete the following steps.

1. In **Management Console**, in the left pane, under **Select Department**, select a department from the list.
2. Click **Capture**.
3. In the right pane, on the **Source Profile** tab, select the source profile you want to delete.
4. Click **Delete**.
5. In the confirmation prompt, click **Yes**.

Modify a source profile

To modify a source profile, complete the following steps.

1. In **Management Console**, in the left pane, under **Select Department**, select a department from the list.
2. Click **Capture**.
3. In the right pane, on the **Source Profile** tab, select the source profile you want to modify.
4. Click **Modify**.
5. Make the changes you want.
6. Click **OK**.

What is a source profile?

A source profile contains information about a server-side capture source. You associate a source profile with one or more capture profiles to make capture a simple task for your users.

The source profile stores information about the file types you want to capture, the method for gathering property values, and whether to move or delete the source files after capturing them into Perceptive Content.

Source profiles for documents and records are available for Import Agent, Interact for Microsoft Outlook, and scanners.

To view records functionality, you must install a Records Manager license.

Scanning Profiles

CaptureNow Adrenaline (Kofax) image processing filters

Image processing allows for scanned images to be manipulated either to improve quality of the incoming image, or to gather data from the image itself. Kofax VirtualReScan (VRS) supports a number of image processing filters, some of which are described here.

Barcode Detection

The Barcode Detection filter can be used to detect and decode barcodes on scanned images. The filter can detect many different types of barcodes, and there is no limit to the number of barcodes it can detect on a page.

Border Removal

The Border Removal filter can be used to remove black edges that sometimes appear around the image during scanning or photo-copying. The Border Removal filter looks for black around the edge of an image (borders) and changes it to white.

Borders must be all black. If the border contains white, the filter will not remove it. The Border Removal filter has no configurable settings.

Deshade

Shaded areas on an image are rectangular areas made up of black speckles. You can remove shaded areas using the deshade feature. The deshade process removes the speckles that make up the shaded areas while preserving the text inside the shaded areas.

Deskew

The Deskew filter can be used to straighten images that show a slant from its correct orientation. Skewing can occur if the original document was skewed when it was fed into the scanner, fax machine, or photocopier. The Deskew filter examines the image and determines the skew angle. The skew angle is measured between the actual edge of the image data and the horizontal or vertical axis. The image data is then rotated to correct the skew angle. Deskewing an image makes the image contents more legible and can improve OCR results.

Despeckle

Speckles on an image are groups of black pixels surrounded by white pixels (or white pixels surrounded by black pixels). You can remove unwanted speckles with the despeckle feature.

Edge Enhancement

The process of cleaning up lines and characters on an image, making them easier to read.

Endorser - Imprinter

Used with imprinter hardware that connects to the scanner and is used to print a string of data onto the original scanned document.

Line Removal

The Line Removal filter can be used to remove lines from or to reconstruct lines on a form-based image. Removing lines can reduce the image file size and improve OCR results.

Patchcode Detection

The Patchcode Detection filter can be used to detect and decode patchcodes on scanned images. The Patchcode Detection filter has no configurable settings.

Streak Removal

Sometimes streaks are included on an image during the scan process. For example, they might occur as a result of marks on the original page, dust in the scanner assembly, or faulty scanner. These streaks can be removed with the streak removal feature.

CaptureNow Adrenaline (Kofax) scanning profile options

The following tables describe the options that CaptureNow displays in a scanning profile for a scanning device that uses a Kofax driver.

Properties

The Properties tab lists the following options.

Manual Start

Allows for a manual start, which requires the user to click the Scan button if present on the device.

Prompt when feeder becomes empty

Specifies to prompt the user when the device's document feeder is empty. This option is useful when the user needs to add pages to a batch scan.

Auto Length Detection

Detects the page length. This option is helpful when a page is shorter than the size specified for Size.

Color Mode

Specifies the color mode to scan images. The available color options vary by scanning device.

Continuous Sheet

For scanning pieces of paper larger than legal size.

Destination

Specifies where scanned pages output to. This option is only available if the scanning device has more than one destination.

DPI

Specifies the Dots Per Inch (DPI). A higher DPI enhances image quality but also uses more storage space.

Orientation

Specifies the page orientation as landscape or portrait.

Scan Start

Specifies the number of seconds the user can load paper into the scanning device after a scan operation begins. This option only applies when you the user manually feeds pages into the scanner. We recommend 30 seconds. If you set Scan Start to 0, no timeout occurs.

Set Scan Start to a value that is equal to or less than the value for Timeout on the Advanced tab.

Sides

Specifies which sides of a page to scan. You can choose one of the following options:

Simplex. Scans one side of each page.

Duplex. Scans both sides of each page. The scanning device must support duplex scanning.

Size

Specifies which paper size to scan.

Source

Specifies from where the device feeds the paper. This option is only available if the device has more than one source.

Flatbed

If the scanning device includes a flatbed, CaptureNow lists the following options.

Action

Specifies the action between flatbed scans. You can choose one of the following options:

Prompt Between Scans. Displays a prompt asking if the user wants to scan another page.

Delay Between Scans. Displays a dialog box based on the Delay and Default options described later in this table.

Default

Specifies which action occurs when the Delay timer expires. This option only applies when you set Action to Delay Between Scans. You can choose one of the following options:

Scan. Scan when the Delay timer expires.

Stop. Stop scanning when the Delay timer expires.

Delay

Specifies how long the prompt remains open before CaptureNow performs the Default action. This option only applies when you set Action to Delay Between Scans.

Prompt to turn on ADF

Specifies whether to prompt the user to turn on the Automatic Document Feeder (ADF). This option is helpful when the user needs the ability to scan from either the flatbed or the document feeder within one profile.

Scan from flatbed when feeder is empty

Specifies whether to initiate flatbed scanning when the document feeder becomes empty.

Advanced

The Advanced tab lists the following options.

Advanced button

Opens the Advanced Settings dialog box that provides additional options. These options vary by scanning device.

Calculate Blank Page Deletion

Indicates that a more advanced comparison will be used to delete blank pages. Useful in the event that Kofax fails to properly set deletion flag when file size is less than the threshold.

Image Processing Filters

Allows for scanned images to be manipulated either to improve quality of the incoming image, or to gather data from the image itself.

Prescan

Specifies the number of pages for the Kofax accelerator to cache.

Timeout

Specifies the number of seconds before the scanning process expires after the last page is scanned.

Units button

Opens the Units dialog box where you can specify units of measurement (inches, centimeters, or pixels).

Options

The Options tab lists the following options.

Back Picking Rectangle Enabled

Specifies picking angle for devices supporting duplex scanning. Required that the current profile have Duplex selected in the Sides field on the Properties tab.

Blank Page Detection (threshold)

Indicates if blank page is detected. If the threshold is not met, the scanned image will be discarded. The threshold is the minimum file size (in Kilobytes) that a file must be in order to be retained.

Front Picking Rectangle Enabled

Specifies that a picking rectangle will be used within the profile. Picking rectangles retain a portion of the scanned document (as defined through the top, left, width, and height fields). The rest of the image is discarded.

Height

Specifies the total height, starting with top measurement.

Left

Specifies the distance from the left edge of the original page to being cropping the image.

Rotation

Specifies if the scanned page will be rotated. Pages can be rotated in 90 degree increments.

Top

Specifies the distance from the top edge of the original page to begin cropping the image.

Unit

Indicates the unit of measure for the top, left, width, and height measurements.

Width

Specifies the total width of the cropped image, starting with left measurement.

CaptureNow ISIS (Pixel) image processing filters

Image processing allows for manipulation of scanned images either to improve quality of the image as it is imported or to gather data from the image itself. Pixel Supports a number of image processing filters for color and binary (black and white) image.

Filters

Although you can use all filters for both color and binary images, adding the Threshold filter to convert an image to black and white may improve the results if processed prior to another filter, such as Dilation. The order in which the filters appear in the Selected filters pane determines at what point during the image processing Perceptive Content performs the filter action. When you build your Scanning Profile as part of building your Capture Profile, the following filter options are available in the Image Processing tab when you choose Pixel as your device.

Barcode Detection

The Barcode Detection filter can be used to detect and decode barcodes on scanned image. the filter can detect many different types of barcodes, and there is no limit to the number of barcodes it can detect on a page.

Black Overscan Removal

The Black Overscan Removal filter can be used to remove the black area around an image when a page is scanned using an overscan option. Unlike the Border Removal filter, which inverts the black pixels and makes them white, and the Crop filter which removes white space from around the edge of the image, the Black Overscan removal filter removes the overscan area from your image. This filter reduces the physical size of the scanned image and the image file size by eliminating the black border generated by scanners with black backgrounds. For best results, deskew images with black fill before applying this filter. The Black Overscan removal filter has no configurable settings.

Blank Page Detection

The Blank Page Detection filter can be used to detect blank pages. Use the Sensitivity property to specify noise tolerance during detection.

Border Removal

The Border Removal filter can be used to remove black edges that sometimes appear around the image during scanning or photo-copying. The Border Removal filter looks for black around the edge of an image (borders) and changes it to white. Borders must be all black. If the border contains white, the filter will not remove it. The Border Removal filter has no configurable settings.

Color Dropout

The Color Dropout filter takes a color image and transforms specified colors into other colors. The filter maintains a list of color mappings that it should make when the filter is run. The Color Dropout Properties dialog allows the user to manage a list of colors that will be transformed.

Crop

The Crop filter can be used to set image margins and to remove white space around the edge of the image. You can set different values for the Top, Left, Bottom, and Right properties, or you can use the Force Symmetry property to lock the top/bottom and left/right margins to the same values.

Deskew

The Deskew filter can be used to straighten images that show a slant from its correct orientation. Skewing can occur if the original document was skewed when it was fed into the scanner, fax machine, or photocopier. The Deskew filter examines the image and determines the skew angle. The skew angle is measured between the actual edge of the image data and the horizontal or vertical axis. The image data is then rotated to correct the skew angle. Deskewing an image makes the image contents more legible and can improve OCR results.

Dilation

The Dilation filter can be used to expand the area of black objects in an image. Using this filter may improve image quality and the legibility of text. Performing dilation can increase the file size.

Erosion

The Erosion filter can be used to trim the area of black objects. Using this filter will reduce the file size, but you could lose a lot of detail from the image content.

Halftone Removal

The Halftone Removal filter can be used to remove a background from an image or a graphics object on the image. The Halftone Removal filter has no configurable settings.

Hole Removal

The Hole Removal filter can be used to remove punch holes from the edges of the image. The algorithm searches for objects which look like punch holes around the edges of the image. Punch hole-like graphics objects in other areas of the image will not be removed. The Hole Removal filter has no configurable settings.

Invert Image

The Invert filter can be used to invert the image to its negative equivalent. The filter actually modifies the image data itself, changing white pixels to black and black pixels to white. The Invert filter has no configurable settings.

Line Removal

The Line Removal filter can be used to remove lines from or to reconstruct lines on a form-based image. Removing lines can reduce the image file size and improve OCR results.

Noise Removal

The Noise Removal filter returns or sets the maximum area percentage an object can take up within the area defined by the maximum noise width and height in order for the object to be considered noise.

Patchcode Detection

The Patchcode Detection filter can be used to detect and decode patchcodes on scanned images. The Pathcode Detection filter has no configurable settings.

Rotation

The Rotation filter can be used to perform image rotation in 90 degrees increments. It can rotate the image 90 degrees clockwise and counterclockwise. it can also rotate it 180 degrees as well as perform mirroring, which flips the page across the vertical axis so that it appears to be the mirror image of the original.

Scaling

The Scaling filter can be used to resize an image while preserving the original aspect ratio. After you specify the desired width and height after scaling, the image area is resized so that it fits within those boundaries, while maintaining the aspect ratio. If either the desired height or width value is larger than the scaled image area, then the image area is centered along that dimension and white margins added to both sides.

Skeleton

The Skeleton filter can be used to reduce black objects in an image to one pixel thick skeletonized versions. Using this filter can reduce file size, but it can seriously distort the image. It should be used with caution and is usually only appropriate with certain types of OCR engines. The Skeleton filter has no configurable settings.

Smoothing

The Smoothing filter can be used to remove bumps and spurs that appear on text characters or graphics objects in the image. The filter looks for any pixel that is surrounded by five or six other connected pixels of the opposite color, and then inverts that center pixel based on the filter configuration. Smoothing is a good way to improve legibility or to reduce the file size without losing a lot of image detail.

Threshold

The Threshold filter can be used to convert a 24-bit color image to a binary image. All of the pixels in a color image that are darker than the threshold specified with the Brightness and Contrast properties are converted to black and all of the pixels that are lighter than the threshold are converted to white.

CaptureNow ISIS (Pixel) scanning profile options

The following lists describe the options that CaptureNow displays in a scanning profile for a scanning device that uses a Pixel driver.

Properties

The Properties tab lists the following options.

Paper Size

Specifies which paper size to scan.

DPI

Specifies the Dots Per Inch (DPI). A higher DPI enhances image quality but also uses more storage space.

Color

Specifies the color mode to scan images. The available color options vary by scanning device.

ADF Timeout

Specifies the number of seconds before the scanning process times out after the device scans the last page.

Scan Source

Specifies from where the device feeds the paper.

Orientation

Specifies the page orientation as landscape or portrait.

Sides

Specifies which sides of a page to scan. You can choose one of the following options:

Simplex. Scans one side of each page.

Duplex. Scans both sides of each page. The scanning device must support duplex scanning.

Prompt when feeder becomes empty

Specifies to prompt the user when the device's document feeder is empty. This option is useful when the user needs to add pages to a batch scan.

Enable ScanAhead

Specifies for imprinter hardware that is connected to the scanner to print a string of data onto the original scanned page.

Advanced button

Opens the Advanced Settings dialog box for the selected device. The options vary by scanning device.

Flatbed

If the scanning device includes a flatbed, CaptureNow lists the following options.

Scan from flatbed when feeder is empty

Specifies whether to initiate flatbed scanning when the document feeder becomes empty.

Prompt to turn on ADF

Specifies whether to prompt the user to turn on the Automatic Document Feeder (ADF). This option is helpful when the user needs the ability to scan from either the flatbed or the document feeder within one profile.

Action

Specifies the action between flatbed scans. You can choose one of the following options:

Prompt Between Scans. Displays a prompt asking if the user wants to scan another page.

Delay Between Scans. Displays a dialog box based on the Delay and Default options described later in this table.

Delay

Specifies how long the prompt remains open before CaptureNow performs the Default action. This option only applies when you set Action to Delay Between Scans.

Default

Specifies which action occurs when the Delay timer expires. This option only applies when you set Action to Delay Between Scans. You can choose one of the following options:

Scan. Scan when the Delay timer expires.

Stop. Stop scanning when the Delay timer expires.

Image Processing

The Image Processing tab lists the following options.

Front

Displays image processing filters available for Simplex scanning.

Back

Displays image processing filters available for Duplex scanning.

Modify button

Lets you add, remove, and configure the available filters.

Create a scanning profile

A scanning profile contains information about scanning hardware. You associate a scanning profile with a capture profile. To create a profile for a scanning device, complete the following steps.

Prerequisite The user logged in to the local machine must have the Write permission for the *[drive]:\Documents and Settings\All Users\Application Data\Perceptive Content\etc* directory. Before you begin this procedure, ensure the scanning device is configured.

1. On the **Perceptive Content** toolbar, click **Settings > Options**.

2. In the **ImageNow Options** dialog box, perform the following substeps.
   1. In the left pane, click **Capture**.
   2. On the **General** tab, under **Scanning Profiles**, click **Manage Profile List**.
3. In the **Scanning Profile Manager** dialog box, click **Create**.
4. In the **Scanning Profile** dialog box, on the **General** tab, perform the following substeps.
   1. In the **Name** box, type a unique profile name.
   2. In the **Description** box, type a short profile description.
   3. In the **Device** box, select a scanning device.

      Depending on the type of driver you selected for the scanning device, the Scanning Profile dialog box will display different tabs. Kofax drivers use General, Properties, Advanced, and Options tabs. Other drivers use General, Properties, and Image Processing tabs.
5. On the **Properties** tab, under **Properties**, choose the options you want.
6. Optional. If you are working with a flatbed scanner, under **Flatbed Settings**, choose the options you want. If your scanner does not support flatbed scanning, then the **Flatbed Settings** options are dimmed and unavailable.
7. When using Kofax drivers, on the **Advanced** tab, under **Options**, choose one or more of the following options.
   - In the **Prescan** box, specify the number of pages to be cached by the Kofax Accelerator.
   - In the **Timeout** box, specify the time in seconds before the scanning process will stop after the last page is scanned.
   - To delete blank pages from the scanning process by using a more advanced comparison, select the **Calculate Blank Page Deletion** check box.
   - Click **Advanced**, and then choose the options you want. These vary based on the device you have installed.
   - Click **Units**, and then specify what units of measurement you want for the current profile.
8. When using Kofax drivers, on the **Options** tab, choose the options you want in order to scan part of a document, not all of it. If your scanning device supports duplex scanning, then you can specify a picking rectangle for both front and back pages.
9. On the **Image Processing** tab, select a filter and add it to the **Selected Filters** pane. Once added, you can configure the filter, move it up or down, or remove it.

   The order in which the filters appear in the **Selected Filters** pane determines at what point during the image processing Perceptive Content performs the filter action. For example, if you added the Threshold filter to convert an image to black and white and the Dilation filter to expanding the area of black objects in an image, you would need to ensure that the Threshold filter appears above the Dilation filter in the Selected Filters pane.
10. Click **OK** to return to the **Perceptive Content** toolbar.

Create an external interface capture profile for a document

You use an external interface capture profile with external interfaces such as iScript or Integration Server. To create an external interface capture profile, complete the following steps.

1. In **Management Console**, in the left pane, under **Select Department**, select a department from the

list.

2. Click **Capture**.
3. In the right pane, on the **Capture Profile** tab, click **New > External Interface**.
4. If the **Capture Profile Content Type** page appears, select **Document**, and then click **Next**.
5. On the **Capture Profile Information** page, perform the following substeps.
    1. Type a name and optional description.
    2. Verify that the **Profile is active** check box is selected.
    3. Click **Next**.
6. In the **Capture Profile Options** page, complete the following substeps.
    1. In the **Application plan** list, select the External application plan that you want to associate with this capture profile.
    2. Optional. In the **Workflow process** list, select the workflow process to which you want to route the new items.
    3. If you selected a workflow process, in the **Workflow queue** list, select the workflow queue to which you want to route the new items.
    4. Optional. To submit items to **Recognition Agent** for bar code scanning, select the **Submit to Content Server** check box.
    5. Optional. To add items to version control, select the **Submit to version control** check box.
    6. Click **Next**.
7. In the **Capture Profile Verification** page, review your capture profile configuration settings and perform one of the following actions.
    - To modify a configuration setting, click **Back** and make any needed changes.
    - To keep the configuration settings, click **Finish**.

Create an External Scanner source profile

Use this source profile when capturing images from an application that is utilizing Integration Server to connect with Perceptive Content. This source profile stores settings you configure for your scanner, and those become the default settings for any scan application you use. To create an External Scanner source profile, complete the following steps.

1. In **Management Console**, in the left pane, under **Select Department**, select a department from the list.
2. In the left pane, click **Capture**.
3. On the **Source Profile** tab, click **New**.
4. On the **Source Profile Content Type** page, select **Document** or **Record**, and then click **Next**.
5. On the **Source Profile Information** page, complete the following substeps, and then click **Next**.
    1. Under **Name**, type a name for the source profile.
    2. Under **Description**, type a description for the source profile.
    3. Under **Source**, select **External Scanner**.

    > **Note:** This source profile is active and available for use with scanner capture profiles. To

deactivate this source profile, clear the **Profile is active** check box.

6. On the **Scanner Options** page, select scanner settings according to the options available for your scanner. To display additional settings for your scanner when you scan, select **Display property dialog at scan time**. Click **Next**.
7. On the **Scanner Barcode Options** page, enable barcode detection for each barcode type you want, and then click **Next**.

   Note: AutoBarcode is enabled by default, and identifies all barcode types. To ensure that only specific barcode types are identified, you must disable **AutoBarcode**.

8. On the **Scanner Image Processing Options** page, select image processing options for your scanner, and then click **Next**.
9. On the **Source Profile Verification** page, verify that the source profile settings are accurate, and then click **Finish**.

What is a scanning profile?

A scanning profile is a type of source profile that contains information about your scanning hardware.

You can configure, save, and apply multiple settings related to available scanning hardware, and associate those settings with capture profiles. Scanning profiles store information about the type of scanner your users are using, along with scanner-specific features such as paper size, color mode, and image processing filters. Before you can create a scanning profile, you must install and license the scanner and then configure it to work with CaptureNow.

Package Mode

Change the default basket for a basket group

When a user selects a basket group instead of a basket to capture files in ImageNowViewer - Package, Perceptive Content captures the files into the basket set as the group's default. To set a basket as the default for a basket group in Package Mode, complete the following steps.

1. On the **Perceptive Content** toolbar, click **Settings > Options**.
2. In the **ImageNowOptions** dialog box, in the left pane, click **Capture**.
3. On the **General** tab, under **Package Settings**, click **Manage Group List**.
4. In the **Basket Manager** dialog box, select the basket group and click **Modify**.
5. In the **Basket Group** dialog box, on the **Baskets** tab, in the **Default** list, select a basket.
6. Click **OK**.

Configure Package mode to import files overview

To enable users to import files using Package mode, complete the following sequence of procedures to configure the necessary component.

1. Create a manual application plan or Create a LearnMode application plan.

2. Create a Package Mode capture profile from Filesourceoverview
3. Createabasket group.
4. Create a basket for a basket group.
5. Specify an application plan for Package mode.
6. Optional. Distribute a client-based capture or scanningprofile if the capture profiles you create for Package mode apply to multiple workstations.

Configure Package Mode with Scan Prompter overview

To enable users to scan pages using Package Mode while Scan Prompter guides them through the process, complete the following sequence of procedures.

1. Create a manual application plan or Createa LearnMode application plan.
2. Create a scanning profile for each type of scanner used to scan pages into **Package Mode**.
3. Create a Package Mode capture profile from Scanner source overview.
4. Createa basket group.
5. Create a basket for a basket group.
6. Createa package scanning document rule and associate it with the basket group.
7. Specify an application plan for Package mode or specify to allow a user to select an application plan at the time of capture.
8. Optional. Distribute a client-based capture or scanning profile if the scanning and capture profiles you create for Package mode apply to multiple workstations.

Configure Package Mode without Scan Prompter overview

To enable users to scan pages using Package Mode without a Scan Prompter, complete the following sequence of procedures.

1. Create a manual application plan or Create a LearnMode application plan.
2. Create a scanning profile for each type of scanner used to scan pages into **Package Mode**.
3. Create a Package Mode capture profile from Scannersource overview.
4. Create a basket group.
5. Create a basket for a basket group.
6. Specify an application plan for Package mode or specify to allow a user to select an application plan at the time of capture.
7. Optional. Distribute a client-based capture or scanningprofile if the scanning and capture profiles you create for Package mode apply to multiple workstations.

Copy a basket

To quickly create a new basket, you can base the group on an existing basket. To copy a basket in Package Mode, complete the following steps.

1. On the **Perceptive Content** toolbar, click **Settings > Options**.
2. In the **ImageNowOptions** dialog box, in the left pane, click **Capture**.

3. On the **General** tab, under **Package Settings**, click **Manage Group List**.
4. In the **Basket Manager** dialog box, select the basket group and click **Modify**.
5. In the **Basket Group** dialog box, on the **Baskets** tab, select the basket group and click **Copy**.
6. Click **OK** until you return to the **Perceptive Content** toolbar.

Copy a basket group

To quickly create a new basket group, you can base it on an existing basket group. To copy a basket group in Package Mode, complete the following steps.

1. On the **Perceptive Content** toolbar, click **Settings > Options**.
2. In the **ImageNowOptions** dialog box, in the left pane, click **Capture**.
3. On the **General** tab, under **Package Settings**, click **Manage Group List**.
4. In the **Basket Manager** dialog box, click the basket group and click **Copy**.
5. Click **OK**.

Create a basket group

To create a basket group in Package Mode, complete the following steps.

1. On the **Perceptive Content** toolbar, click **Settings > Options**.
2. In the **ImageNowOptions** dialog box, in the left pane, click **Capture**.
3. On the **General** tab, under **Package Settings**, click **Manage Group List**.
4. In the **Basket Manager** dialog box, to prompt a user to select a basket group to process files directly after logging in, select the **Prompt at login** check box and click **Create**.
5. In the **New Basket Group** dialog box, on the **General** tab, type a name and optional description.
6. In the **Status** list, verify that **Active** is selected.
7. To assign a capture profile to the basket group, select the **Profile** check box and perform one of the following actions:
   - To assign a capture profile to this basket group, in the **Profile** list, select a capture profile.
   - To allow a user to select a capture profile, in **ImageNowViewerPackage**, in the **Profile** list, select **Use selected Capture Profile**.
8. To display only the drawers for which the user has the Create privilege, on the **Baskets** tab, verify that the **Restrict drawer selection** check box is selected.
9. Click **OK**.

Next Add baskets to the basket group.

Create a package scanning document rule

To create a document rule that Scan Prompter evaluates to guide a user through the scanning process in Package Mode, complete the following steps.

1. On the **Perceptive Content** toolbar, click **Settings > Options**.
2. In the **ImageNowOptions** dialog box, in the left pane, click **Capture**.

3. On the **General** tab, under **Package Settings**, click **Document Rules**.
4. In the **Document Rules Manager** dialog box, click **Create**.
5. In the **New Document Rule** dialog box, on the **General** tab, type a name and optional description.
6. To define how **Scan Prompter** displays the rule, in the **Priority** list, select one of the following options:
   - **Required**. Forces the user to take the indicated action in Scan Prompter by clicking either the **Scan** or **Review** button.
   - **Optional**. Displays Scan Prompter but allows the user to skip the action by clicking the **Defer** button.
   - **Disabled**. Disables the rule so that Perceptive Content does not apply it to any documents in the basket group. A disabled rule does not display Scan Prompter.
7. To select a capture profile to use when the user clicks the **Scan** button for this rule in **Scan Prompter**, in the **Profile** list, select the capture profile.
8. On the **Conditions** tab, do the following actions:
   1. Click the **Add** button and define the conditions you want to use for the scan prompter.
   2. To display the **Review** button in **Scan Prompter**, select the **On Success, display for Review (with comment)** check box.

      The Review button enables the user to inspect a previously scanned document.
   3. To display a message in **Scan Prompter** when a document on file passes all the conditions for a specific rule, in the **Comments** box, type the message. For example,

      Example Scan optional. There is already a valid driver's license on file for this patient.
9. On the **Basket Groups** tab, select the basket group that you want the rule to evaluate.
10. Click **OK** twice.

Delete a basket from a basket group

To delete a basket from a basket group in Package Mode, complete the following steps.

1. On the **Perceptive Content** toolbar, click **Settings > Options**.
2. In the **ImageNowOptions** dialog box, in the left pane, click **Capture**.
3. On the **General** tab, under **Package Settings**, click **Manage Group List**.
4. In the **Basket Manager** dialog box, select the basket group and click **Modify**.
5. In the **Basket Group** dialog box, under **Baskets**, select the basket you want to delete and click **Remove**.
6. Click **OK**.

Delete a basket group

To delete a basket group and the baskets it contains in Package Mode, complete the following steps.

1. On the **Perceptive Content** toolbar, click **Settings > Options**.
2. In the **ImageNowOptions** dialog box, in the left pane, click **Capture**.
3. On the **General** tab, under **Package Settings**, click **Manage Group List**.

4. In the **Basket Manager** dialog box, select the basket group and click **Delete**.
5. Click **OK**.

Document rule conditions for package scanning

The following document rule conditions exist in Package Mode. Scan Prompter evaluates a document rule to guide a user through the scanning process.

Type

Simple

Field

Drawer

Name

Field1

Field2

Field3

Field4

Field5

Document Type

Property

Creation Time

Creation User

Days since Creation

Days since Last View

Days since Modification

Mod Time

Mod User

Total Pages

Operator

Equal to

Not Equal to

Greater Than

Greater Than or Equal to

Less Than

Less Than or Equal to

Value

Type your value

Comment

Type your comment to notify end-users about the status or requirements for a document in Perceptive Content.

Make a basket group active or inactive

Users can only capture files into a basket that is in an active basket group. To change the status of a basket group to active or inactive, complete the following steps.

1. On the **Perceptive Content** toolbar, click **Settings > Options**.
2. In the **ImageNowOptions** dialog box, in the left pane, click **Capture**.
3. On the **General** tab, under **Package Settings**, click **Manage Group List**.
4. In the **Basket Manager** dialog box, click the basket group and click **Modify**.
5. In the **Basket Group** dialog box, on the **General** tab, in the **Status** list, select **Active** or **Inactive**.
6. Click **OK**.

Modify a basket

To modify a basket in Package Mode, complete the following steps.

1. On the **Perceptive Content** toolbar, click **Settings > Options**.
2. In the **ImageNowOptions** dialog box, in the left pane, click **Capture**.
3. On the **General** tab, under **Package Settings**, click **Manage Group List**.
4. In the **Basket Manager** dialog box, select a basket group and click **Modify**.
5. In the **Basket Group** dialog box, on the **Baskets** tab, select the basket and click **Modify**.
6. In the **Basket Definition** dialog box, make any changes you want.
7. Click **OK**.

Modify a basket group

To modify a basket group in Package Mode, complete the following steps.

1. On the **Perceptive Content** toolbar, click **Settings > Options**.
2. In the **ImageNowOptions** dialog box, in the left pane, click **Capture**.
3. On the **General** tab, under **Package Settings**, click **Manage Group List**.
4. In the **Basket Manager** dialog box, select the basket group and click **Modify**.
5. In the **Basket Group** dialog box, make any changes you want.
6. Click **OK**.

Reorder basket groups

To change the order in which basket groups display in a viewer, complete the following steps.

1. On the **Perceptive Content** toolbar, click **Settings > Options**.
2. In the **ImageNowOptions** dialog box, in the left pane, click **Capture**.
3. On the **General** tab, under **Package Settings**, click **Manage Group List**.
4. In the **Basket Manager** dialog box, select a basket group and click **Up** or **Down**. Repeat this step until the basket groups appear in the order you want.
5. Click **OK**.

Reorder baskets in a basket group

To change the order in which baskets display within a basket group in ImageNowViewer - Package, complete the following steps.

1. On the **Perceptive Content** toolbar, click **Settings > Options**.
2. In the **Perceptive Content Options** dialog box, in the left pane, click **Capture**.
3. On the **General** tab, under **Package Settings**, click **Manage Group List**.
4. In the **Basket Manager** dialog box, select the basket group and click **Modify**.
5. In the **Basket Group** dialog box, on the **Baskets** tab, select a basket and click **Up** or **Down**. Repeat this step until the baskets appear in the order you want.
6. Click **OK** twice.

Show or hide a basket group

Perceptive Content automatically hides a basket group when you define it as inactive, but you can show or hide any basket group. To show or hide a basket group, complete the following steps.

1. On the **Perceptive Content** toolbar, click **Settings > Options**.
2. In the **ImageNowOptions** dialog box, in the left pane, click **Capture**.
3. On the **General** tab, under **Package Settings**, click **Manage Group List**.
4. In the **Basket Manager** dialog box, perform one of the following actions:
   - To show a basket group in **ImageNowViewer** - **Package**, select the check box to the left of the

basket group name.

- To hide a basket group in **ImageNowViewer** - **Package**, clear the check box to the left of the basket group name.

5. Click **OK**.

Specify an application plan for Package mode

You can specify that a user must use a particular application plan with Package mode, or you can specify that a user must select an application plan at the time of capture. The option you specify applies to all basket groups and baskets. To specify an application plan for Package mode, complete the following steps.

1. On the **Perceptive Content** toolbar, click **Settings > Options**.
2. In the **ImageNowOptions** dialog box, in the left pane, click **Capture**.
3. In the right pane, under **Package Settings**, in the **Application Plan** list, perform one of the following actions:
   - To select an application plan for all basket groups and baskets, select the application plan you want.
   - To use the application plan selected for Applications on the Perceptive Content toolbar at the time of capture, select **Use Default Application Plan**.
4. Click **OK**.

Troubleshoot Package Mode

The following information describes how you can resolve an issue experienced by a user who is capturing files with Package Mode.

The basket set in the capture profile resides in an inactive basket group

Cause	Resolution
You attempt to use a profile set to capture files into a particular basket, but the basket resides in an inactive basket group.	Modify the capture profile so that you select a basket that resides in an active basket group or the status of the basket group in which the basket resides to Active.

A conflict exists because the application plan is defined to store the document in a folder but the basket definition is not

Cause	Resolution
You attempt to capture files into a basket that is defined to store the files in a drawer using document	Modify the basket so that it stores the files in a folder, modify the application plan so that the map

Cause	Resolution
keys, but the map in the application plan is defined to store the files in a folder using a path.	does not store the files in a folder, or specify a different application plan for Package Mode.

The capture profile setting for the basket group or basket definition is invalid

Cause	Resolution
The capture profile set for the basket group or basket is inactive.	Select the Profile check box in the basket group or the basket definition.
The capture profile set for the basket group or basket was deleted from the Perceptive Content system.	Select a different capture profile for the basket group or the basket in the Profile list.

Sequences

Create a sequence in a capture profile

You can define a sequence and use it as a document property. To create a sequence in a capture profile, complete the following steps.

1. On the **Perceptive Content** toolbar, click **Capture > Manage Capture Profiles**.
2. In the **Capture Profiles** dialog box, select the appropriate capture profile, and then click **Modify**.
3. Click the **Document Keys** tab.
4. Double-click the appropriate key.
5. In the **Key Definition** dialog box, complete the following substeps.
    1. From the **Type** list, select **Sequence Number**.
    2. From the **Value** list, select **Edit Sequence**.
6. In the **Sequence Number** dialog box, click **New**.
7. In the **New Sequence** dialog box, complete the following substeps.
    1. In the **Name** box, type a name for your sequence.
    2. From the **Base** list, select the numeral system you want to use for your sequence.
    3. In the **Width** box, type the number of digits you want to use in your sequence.
    4. In the **Increment** box, type the amount that you want added to your sequence.
    5. In the **Prefix** box, type a static text string that you want to precede the sequence.
    6. In the **Suffix** box, type a static text string that you want to follow the sequence.
8. Click **OK**.

Delete a sequence in a capture profile

To delete a sequence in a capture profile, complete the following steps.

1. On the **Perceptive Content** toolbar, click **Capture > Manage Capture Profiles**.
2. In the **Capture Profiles** dialog box, select the appropriate capture profile, and then click **Modify**.
3. Click the **Document Keys** tab.
4. Double-click the appropriate key.
5. In the **Key Definition** dialog box, do the following actions:
    1. From the **Type** list, select **Sequence Number**.
    2. From the **Value** list, select **Edit Sequence**.
6. In the **Sequence Number** dialog box, select the sequence you want to delete and click **Delete**.
7. In the confirmation dialog box, click **Yes**.

Modify or rename a sequence

Using sequences, you can define your own sequence number and use it as a document property. To modify or rename a sequence, complete the following steps.

1. On the **Perceptive Content** toolbar, click **Capture > Manage Capture Profiles**.
2. In the **Capture Profiles** dialog box, select the capture profile you want, and then click **Modify**.
3. Click the **Document Keys** tab.
4. Double-click the appropriate key.
5. In the **Key Definition** dialog box, do the following actions:
    1. From the **Type** list, select **Sequence Number**.
    2. From the **Value** list, select **Edit Sequence**.
6. In the **Sequence Number** dialog box, click **Modify**.
7. In the **New Sequence** dialog box, do the following actions:
    1. In the **Name** box, type a name for your sequence.
    2. From the **Base** list, select the numeral system to use for your sequence.
    3. In the **Width** box, type the number of digits to use in your sequence.
    4. In the **Increment** box, type the amount to add to your sequence.
    5. In the **Prefix** box, type a static text string to precede the sequence.
    6. In the **Suffix** box, type a static text string to follow the sequence.
8. Click **OK**.

Manage item properties

What is a custom property?

A custom property is a property field that is populated with data relating to an item or container.

A custom property allows you to store unlimited data beyond the standard item properties or container structure. You make custom properties available to items and containers by assigning them to item types or container types.

You can define a custom property using one of the following data types: Composite, Date, Flag, List, Number, String, and User. Formatting settings let you control the data entry and display appearance of the custom property for viewing by your end users. If you choose the Composite data type, you can create a composite property that is a single property that contains one or more custom properties. Some data types require default values. For others, default values are optional.

Suppose, for example, that the Human Resources Department has a "New Hire" folder type that is used to create a folder for each new employee. When Human Resources hires a new Marketing director, the user creates a new folder using the New Hire folder type and enters the following custom property values in Perceptive Content for the folder:

- A string custom property for "Job Title" with the value "Marketing Director".
- A date custom property for "Date of Hire" with the value "05/08/2012".

As another example, a document assigned with the "Medical Enrollment Form" document type is added to each new employee's folder. When the new employee completes the form, the user enters the following custom property values in Perceptive Content for the document:

- A list custom property for "Plan Year" with the value "2012".
- A date custom property for "Coverage Start Date" with the value "06/01/2012".

What is a composite property?

A composite property allows you to store multiple values or sets of values that are based on one or more existing custom properties, and group and refine the metadata that your users use to describe the documents and folders in your system.

Composite properties also allow users to store differing numbers of values in a single property. In the custom properties of a document or folder, the user can add values to, change existing values in, or remove values from a composite property at any time.

You can perform a search to locate documents, folders, and workflow items based on composite property values just as you would when searching on any document or folder property.

The following examples show how you might use composite properties:

- You define a composite property to store values using a single custom property. In this example, suppose you are tracking test scores for a student. Whenever a student repeats a test, the user tracking the test scores must add the new score to the Test Results property in that student's document. For one student, the score might contain one value, and for another it may contain fifteen values.
- You define a composite property to store sets of values using multiple custom properties. Expanding on the previous example, suppose the user tracking the test scores needs to enter a date along with each test score and a flag value that indicates whether a retest is required. This expanded Test Results property contains one property set for a student who has taken the test only once, but for a student who has taken the test and then retested five times, it contains six property sets, each with its own score, date, and retest values.

Create a custom property overview

To create a custom property you can assign to a document or folder type or use as part of a composite property, complete any of the following procedures.

- Create a date custom property.
- Create a flag custom property
- Create a list custom property
- Create a number custom property.
- Create a string custom property.
- Create a user custom property.

Create a date custom property

To create a custom property that stores a date value, complete the following steps.

1. In **Management Console**, in the left pane, under **Select Department**, select a department from the list.
2. In the left pane, click **Custom Properties**.
3. In the right pane, click **New > Date**.
4. In the **New Date Property** dialog box, in the **Name** box, type the name of the custom property.
5. In **Default value** list, do one of the following options:
   - To use the current date as the default value, select the **Default to the current date** check box.
   - To select a date to use as the default value, clear the **Default to the current date** check box and select the desired default date in the **Default value** list.
   - To use no default value, leave the default value empty and clear the checkbox.
6. In the **Display Format** section, select the **Month**, **Day**, **Year**, and **Weekday** check boxes to show the respective portion of the date.
7. Click **OK**.

Next You can assign the custom property to a document type, folder type, record type, record folder type, or composite property.

Create a flag custom property

To create a custom property that stores a flag, or boolean value, complete the following steps.

1. In **Management Console**, in the left pane, under **Select Department**, select a department from the list.
2. In the left pane, click **Custom Properties**.
3. Click **New > Flag**.
4. In the **New Flag Property** dialog box, in the **Name** box, type a name for the custom property.
5. Optional. In the **Default value** list, select **True** or **False** for the default value for this custom property.

   > **Note:** If you leave this setting empty, no default value appears in the custom property.

6. In the **Positive Label** box, type the value to display when the condition is true.
7. In the **Negative Label** box, type the value to display when the condition is false.

   > **Note:** The Flag property stores values of 0 or 1 based on the value that is selected by the user. The **Positive Label** and **Negative Label** boxes allow you to adjust the labels that represent the stored values.

8. Click **OK**.

Next You can assign the custom property to a document type, folder type, or composite property.

Create a list custom property

To create a custom property that stores a value from a predefined list, complete the following steps.

Prerequisite This procedure requires the **Global > Manage > Custom Properties** privilege.

1. In **Management Console**, in the left pane, under **Select Department**, select a department from the list.
2. In the left pane, click **Custom Properties**.
3. In the right pane, click **New > List**.
4. In the **New List Property** dialog box, in the **Name** box, type a name for the custom property.
5. To add items to the list, do the following substeps:
   1. Under **Display Format**, in the **Values** list, click **Add**.
   2. Type the value for the list item and then press `ENTER`.
   3. Repeat the previous substeps for each value you want to display in the list.
   4. Optional. After you add all list items, use the **Move Up** and **Move Down** buttons to rearrange the order of the list items.
6. Optional. In the **Default value** list, select the default list item value for this custom property.
7. Click **OK**.

Next You can assign the custom property to a document type, folder type, or composite property.

Create a number custom property

To create a custom property that stores a numeric value, complete the following steps.

1. In **Management Console**, in the left pane, click **Custom Properties**.
2. In the right pane, click **New > Number**.
3. In the **New Number Property** dialog box, in the **Name** box, type a name for this custom property.
4. Optional. In the **Default value** box, type the number to use for the default value for this custom property.
5. Under **Display Format**, complete the following substeps.
   1. In the **Format** list, select **Currency** or **Decimal**.

      > **Note:** Select **Currency** format for currency values and **Decimal** format for standard numeric values.

   2. If you are using **Currency** format, select the currency type from the list.
   3. If you are using **Decimal** format, select whether the decimals are **Fixed** or **Varying**.
   4. If you are using **Decimal** format, in the **Decimal Places** box, type or select the number of decimal places.

      > **Note:** If you are using a varying decimal value for a numeric value, you cannot set the number of decimal places.

   5. Optional. To remove the thousands separator from numbers greater than 999, clear the **Punctuated at thousands** check box.
6. Click **OK**.

Next You can assign the custom property to a document type, folder type, or composite property.

Create a string custom property

To create a custom property that stores a string value, complete the following steps.

1. In **Management Console**, in the left pane, click **Custom Properties**.
2. In the right pane, click **New > String**.
3. In the **New String Property** dialog box, in the **Name** box, type a name for the custom property.
4. Optional. In the **Default value** box, type the default string value for this custom property.
5. Click **OK**.

Next You can assign the custom property to a document type, folder type, or composite property.

Create a user custom property

To create a custom property that stores a username value, complete the following steps.

Prerequisite This procedure requires the **Global > Manage > Custom Properties** privilege.

1. In **Management Console**, in the left pane, click **Custom Properties**.

2. In the right pane, click **New > User**.
3. In the **New User Property** dialog box, in the **Name** box, type a name for the custom property, and then do one of the following options:
   - To select user values from a group, complete the following substeps.
     1. In the Source list, select **Group**.
     2. In the **Group** list, select the group.
   - To select user values from a predefined list, complete the following substeps.
     1. In the Source list, select **Predefined list**.
     2. Click **Add**.
     3. In the **Select Users** dialog box, search for and select the users you want to add to the list and click **OK**.
     4. Reorder the list members as necessary.
4. Optional. In the **Default Value** list, select the default user.
5. Under **Display Format**, in the **Format** list, select a display format.
6. Optional. If you selected a display format other than **User name**, to display the prefix or suffix in the user s user profile when displaying this custom property, select the **Display prefix** and **Display suffix** check boxes.
7. Click **OK**.

Next You can assign the custom property to a document type, folder type, or composite property.

Assign a custom property to a document type

To assign a custom property to a document type, complete the following steps.

Prerequisite Because assigning a custom property to a document type that is already in use can take a long time, cause a potentially unacceptable delay, and use significant resources, we recommend you perform this procedure during non-peak hours.

1. In **Management Console**, in the left pane, click **Document Types**.
2. On the **Document Types** tab, select the document type for which you want to assign a custom property and then click **Modify**.
3. Optional. In the **Document Type** dialog box, on the **Custom Properties** tab, to filter the available custom properties by data type, in the **By Type** list, select the data type you want.
4. In the **Document Type** dialog box, on the **Custom Properties** tab, in the **Available** list, select the custom property you want to add, click **Add**, and then, on the **Add Custom Properties** confirmation dialog box, click **Yes**.
5. If the document type is already in use, in the **Add Custom Property** dialog box, determine how to populate existing custom property values for all documents that are assigned any document types that use this custom property:
   - Select **Use the Default Value** assigned to this property to automatically populate existing custom properties with the default value you specified when you created the custom property.
   - Select **Leave blank** to populate existing custom properties with no value.
   - Select **Use to** type or select a value to populate existing custom properties.

6. Click **OK** and, if you receive another confirmation dialog box indicating the update could take a long time and use significant resources, click **Yes** only if you are sure this will not create an unacceptable delay. Otherwise, click **No** or **Cancel** and repeat the procedure during non-peak hours.
7. Optional. To make a custom property required, in the **Added** list, click once in the column in front of the custom property until is displayed. A required custom property must contain a value whenever the associated item is linked or you change the document type of the associated document.

Assign a custom property to a folder type

To assign a custom property to a folder type, complete the following steps.

1. In **Management Console**, in the left pane, click **Folder Types**.
2. On the **Folder Types** tab, in the **Folder Type** list, select the folder type for which you want to assign a custom property and click **Modify**.
3. Optional. In the **Folder Type** dialog box, on the **Custom Properties** tab, to filter the available custom properties by data type, in the **By Type** list, select the data type you want.
4. In the **Folder Type** dialog box, on the Custom **Properties** tab, in the **Available** list, select the custom property you want to add, click **Add**, and, on the **Add Custom Properties confirmation** dialog box, click **Yes**.
5. If the file type is already in use, in the **Add Custom Property** dialog box, determine how to populate existing custom property values for all folders that are of folder types that use this custom property:
   - Select **Use the Default Value** assigned to this property to automatically populate existing custom properties with the default value you specified when you created the custom property.
   - Select **Leave blank** to populate existing custom properties with no value.
   - Select **Use** to type or select a value to populate existing custom properties.
6. Click **OK**, and if you receive another confirmation dialog box indicating the update could take a long time and use significant resources, click **Yes** only if you are sure this is not an issue. Otherwise, click **No** or **Cancel** and repeat the procedure during non-peak hours.
7. Optional. To make a custom property required, in the **Added** list, click once in the column in front of the custom property. The **Required** icon appears. A required custom property must contain a value whenever the associated item is linked or you change the folder type of the associated document.

Modify a custom property

To change settings for an existing custom property, complete the following steps.

1. In **Management Console**, in the left pane, click **Custom Properties**.
2. In the right pane, select the custom property you want to modify, and then click **Modify**.
3. In the **Modify <Property Type> Property** dialog box, make your changes and then click **OK**.

Delete a custom property

To delete a custom property, complete the following steps.

Because deleting a custom property that is already in use can take a long time, cause a potentially unacceptable delay, and use significant resources, we recommend you perform this procedure during non-peak hours.

1. In **Management Console**, in the left pane, click **Custom Properties**.
2. In the right pane, select the custom property you want, and click **Delete**.
3. On the **Delete Property** dialog box, click **Yes**.

Custom property data types

You can choose from the following data types when you create a custom property. All custom property types can have a default value or contain an empty (or NULL) value.

Data Type Name	Data Type	Description	Value Restrictions
Composite	Inherits types from custom properties	A composite property allows the user to enter multiple values for a single property. If you select a single custom property, the user can add multiple values of the same data type to the composite. The values appear as numbered rows in the Custom Properties pane of the Viewer. If you select multiple custom properties, the user can add multiple property sets of the composite with separate sets of values for each set. Property sets appear as separate hierarchies in the Custom Properties pane of the Viewer.	Values must conform to the data types of the associated custom properties.
Date	Date field	A date stored as a	Not applicable.

Data Type Name	Data Type	Description	Value Restrictions
		string. The displayed date format is based on the settings chosen when you create the custom property.	
Flag	Boolean field	This data type is always stored as TRUE (1) or FALSE (0). The values that display are based on the settings chosen when creating the custom property.	1 or 0 but the display strings that represent the 1 can be altered.
List	Predefined List	This data type creates a group of values that a user can select from a list box for the custom property.	Not applicable.
Number	Decimal number field	Decimal data type display format: Number fields that support both positive and negative numbers up to a limited number of digits. Zeros to the right of the decimal are suppressed. Currency data type display format: Number fields that display as currency defined using one of the ISO 4217 country codes. The default currency setting matches the local settings of the ImageNow Client computer.	Up to 16 digits. Precision of 15 decimal places.
String	Text field	Text fields that support all printable ASCII characters within the	Value can contain up to 128 characters. This limit varies depending

Data Type Name	Data Type	Description	Value Restrictions
		Single Byte character set.	on your database platform.
User	User name	This data type allows you to select an Perceptive Content user to populate the custom property.	Only Perceptive Content users that currently exist in the implementation.

Create a composite property

To create a composite property, complete the following steps.

1. In **Management Console**, in the left pane, click **Custom Properties**.
2. In the right pane, click **New > Composite**.
3. In the **New Composite Property** dialog box, in the **Name** box, type the name of the composite property and do the following substeps:
    1. Optional. In the **By Type** list, select the data type of the custom property you want to add.
    2. In the **Available** list, select a custom property you want to include in the composite custom property and then click **Add**.
4. Repeat the previous substeps until you have added all the custom properties you need.
5. Optional. To reorder the hierarchy of custom properties within the composite, in the **Added** list, select the property you want to reorder and then click **Move Up** or **Move Down**.
6. Click **OK**.

Next You can assign the composite property to a document type, folder type, record type, or record folder type.

Modify a composite property

To change the name of a composite property or modify the custom properties associated with it, complete the following steps.

1. In **Management Console**, in the left pane, click **Custom Properties**.
2. In the right pane, select the composite property you want to modify.
3. To change the name of the composite property, in the **Modify Composite Property** dialog box, in the **Name** box, edit the name of the composite property.
4. To view a single custom property type in the **Available** list, in the **By type** list, select a property type.
5. In the **Available** list, select any additional custom properties you want to include in the composite property and then click **Add**.
6. To rearrange the hierarchy of custom properties within the composite, in the **Added** list, select the property you want to move and then click **Move Up** or **Move Down**.

7. To remove a custom property from the composite, in the **Added** list, select the property and then click **Remove**.
8. Click **OK**.

Manage processes

Tasks

About administering tasks

To administer tasks in Management Console, you create task templates for your users.

You can assign one or more users a task on a particular document or folder. You choose the task type that best matches the work that needs to be done. The three available task types are described below.

- `Document deficiency`. The document deficiency task type is used to indicate when a document is missing or is incomplete.
- `Pointer`. The pointer task type is used to draw attention to a specific document or folder location for further action.
- `Signature required on document`. The signature required on document task type is used when a user needs to digitally sign a document. To use this task type, a Document Management Suite license is required.

Task template security allows you to determine the roles your users have when working with tasks. You can also manage reasons and reason lists for the task templates.

Signatures required on document tasks created in Management Console are available for processing in Interact Desktop. In Interact Desktop, you can Complete, Return, or Skip a Signature required on a document task.

Troubleshoot tasks

If you experience issues using tasks, you can try any of the following possible resolutions.

I don t see a document task in Folder Viewer

Cause	Resolution
If you create a document task and then add that document to a folder, the document task does not appear in the Tasks grid in Folder Viewer.	Only document tasks you create in Folder Viewer appear in the Tasks grid in Folder Viewer.

Not all location options are available when I create a task

Cause	Resolution
The task template you are using to create a task does not have the Task location set in the Components area of the task template.	Use a different task template or select an available location option.
When you are in Folder Viewer and do not have a document open in ImageNowViewer - Folder, the only Location option available is Folder.	To create a document or page task in Folder Viewer, the associated viewer, ImageNowViewer- Folder must be open.
When in ImageNowViewer, Folder is unavailable because you are not in a folder.	Folder is only available when you create a task in Folder Viewer.

Task Templates

Create a document deficiency task template overview

Document deficiency task templates define the structure of document deficiency tasks, which indicate when a document is missing or incomplete. To create and define a document deficiency task template, complete the following sequence of procedures.

1. Create a document deficiency task template.
2. Define task template properties.
3. Define task template components.
4. Optional. Define task template actions.
5. Define task template assignments.
6. Define task template reasons.
7. Define task template due date method.
8. Define task template security.

Create a signature required task template

To create a new signature required task template, complete the following steps.

1. In **Management Console**, in the left pane, under **Select Department**, select a department from the list.
2. In the left pane, click **Tasks**.
3. In the right pane, on the **Templates** tab, in the **Select a task type** box, click **Signature required on document**.
4. Click **New**.

   The **Signature Required on Document Task** dialog box appears.

Next You must define the task template s general properties, components, actions, assignments, reason lists, due date, and security.

Create a pointer task template overview

To create a pointer task template, complete the following sequence of procedures.

1. Create a pointer task template.
2. Define task template properties.
3. Define task template components.
4. Optional. Define task templace actions.
5. Define task template assignments.
6. Define task template reasons.
7. Define task template due date method.
8. Define task template security.

Result The Incomplete Template dialog box appears if you do not define assignments, reason lists, or if you opted to send the folder to workflow when the task location is a document in a folder box, but did not select a queue. You can save this template in any of these states, but the template is set to inactive.

Modify a task template overview

To make changes to a task template, complete the following steps.

1. Open a task template.
2. Define task template properties.
3. Define task template components.
4. Optional. Define task template actions.
5. Define task template assignments.
6. Define task template reasons.
7. Define task template due date method.
8. Define task template security.

Copy a task template

Task templates specify various options for task creation. To copy a task template, complete the following steps.

1. In **Management Console**, in the left pane, under **Select Department**, select a department from the list.
2. In the left pane, click **Tasks**.
3. In the right pane, on the **Templates** tab, in the **Select a task type** box, click a task type.
4. In the **Templates** list, click a template and then click **Copy**.
5. In the **Name** column, type a name and then press `ENTER`.

Rename a task template

To assign a new name to a task template, complete the following steps.

1. In **Management Console**, in the left pane, under **Select Department**, select a department from the list.
2. In the left pane, click **Tasks**.
3. In the right pane, on the **Templates** tab, in the **Select a task type** box, click a task type.
4. In the **Templates** list, click a template and click **Rename**.
5. In the **Name** column, type the text of the template name and then press `ENTER`.

Delete a task template

When you delete a task template, Perceptive Content removes the template from Management Console but retains all associated tasks. To delete a task template, complete the following steps.

1. In **Management Console**, in the left pane, under **Select Department**, select a department from the list.
2. In the left pane, click **Tasks**.
3. In the right pane, on the **Templates** tab, in the **Select a task type** box, click a task type.
4. In the **Templates** list, click a template and then click **Delete**.
5. In the **Task Template** dialog box, click **Yes**.

Configure task email notifications

To configure the options required for task creation email notifications, complete the following steps.

1. To add email addresses so that users can receive task creation notifications, perform the following substeps.
   1. In **Management Console**, in the left pane, under **Select Department**, select a department from the list.
   2. In the left pane, select **Users.**
   3. In the right pane, on the **User Profiles** tab, select the user for whom you want to add an email address and then click **Modify**.
   4. In the **Modify User Profile** dialog box, in the left pane, select **Contact Information**.
   5. In the right pane, in the **Email** box, type the user's email address.
   6. Click **OK**.
   7. Define email addresses for all necessary users.
2. To configure **Perceptive Content** Notification Agent to send email notifications, perform the following substeps.
   1. On the **ImageNow Server** computer, navigate to the *[drive:]***\inserver\etc** folder.
   2. Open the *inserverNotification.ini* file in a text editor.
   3. In the `Email` section, configure the `smtp.server.url` setting.

Example `smtp.server.url=<smtp or smtps>://<SMTP server name or IP address>:<port number>`

4. Configure the `smtp.from` address.

   Example `smtp.from=<From address for email notifications>`

5. Save and close the *inserverNotification.ini* file.

Result All task templates use the same Perceptive Content settings.

Task Reasons

About managing task reason lists

Reasons provide users with pre-set descriptions that they can select to indicate why they are signing, completing, or returning a task.

A reason list is a set of reasons that you, the administrator, bundle as a list from which the user can select. There are two types of reasons and reason lists: Action and Return. While Return reasons are required for each task template type, Action reasons are optional for document deficiency and pointer task template types.

Manage reasons

You can create reasons and then group them together in reason lists. You can assign reasons and reason lists to tasks, workflow item holds, or digital signatures. To create, modify, or delete a reason, complete one of the following steps.

1. In **Management Console**, in the left pane, under **Select Department**, select a department from the list.
2. In the left pane, complete one of the following steps.
   1. To manage reasons for tasks or workflow item holds, under **Select Department**, select a department from the list.
   2. To manage reasons for digital signatures, under **Select Department**, select **Cross Department Settings**.
3. In the left pane, click **Tasks**, **Workflow**, or **Digital Signatures**.
4. In the right pane, on the **Reason Lists** tab, select a reason list and click **Modify**.
5. In the **Reason List** dialog box, on the **List Members** tab, complete one of the following actions.

Situation	Steps
Create a reason	1. Click **New**. 2. In the **Reason** text box, type a name.
Modify a reason	1. Select a reason and click **Modify**.

Situation	Steps
	2. In the **Reason** text box, type a new name.
Delete a reason	1. Select a reason and click **Delete**. 2. In the **Delete Reason** confirmation box, click **Yes**.

Result Changes you make to the available reasons apply to all departments.

Modify a reason list

Reason lists are used when you define action and return reasons in document deficiency and pointer task templates. To modify an reason list for a task template, complete the following steps.

1. In **Management Console**, in the left pane, under **Select Department**, select a department from the list.
2. In the left pane, click **Digital Signatures**.
3. In the right pane, on the **Reason Lists** tab, perform one of the following actions, depending on the situation.
4. Select the reason list and click **Modify**.
5. In the **Reason List** dialog box, on the **General** tab, change the name or description.
6. To enable or disable the list, clear or select the **Is active** check box.
7. On the **List Members** tab, in the **Selected** list, add, remove, or rearrange reasons.
8. Click **OK**.

Manage a reason list for a task template

Reason lists are used when you define action and return reasons in document deficiency and pointer task templates. To create, modify, or delete a reason list for a task template, complete one of the following procedures.

1. In **Management Console**, in the left pane, under **Select Department**, select a department from the list.
2. In the left pane, click **Tasks**.
3. In the right pane, on the **Reason Lists** tab, do one of the following actions, depending on the situation:

Situation	Steps
Create a reason list	1. Click **New**. 2. In the **Reason List** dialog box, on the **General** tab, type a name and optional

Situation	Steps
	description. 3. Verify that the **Is active** check box is selected to make the list available for assignment. 4. On the **List Members** tab, add, remove, or rearrange reasons. 5. Click **OK**.
Modify a reason list	1. Click **Modify**. 2. In the **Reason List** dialog box, on the **General** tab, modify the name or optional description. 3. To enable or disable the reason list, clear or select the **Is active** check box. 4. On the **List Members** tab, add, remove, or rearrange reasons. 5. Click **OK**.
Delete a reason list	1. Click **Delete**. 2. In the **Delete Reason List** confirmation box, click **Yes**.

Manage action reason lists for a signature required task template

To create, modify, or delete an action reason list for a signature-required task template, complete the following steps.

1. In **Management Console**, in the left pane, under **Select Department**, select a department from the list.
2. In the left pane, under **Select Department**, select **Cross Department Settings** from the list.
3. In the left pane, click **Digital Signatures**.
4. In the right pane, on the **Reason Lists** tab, perform one of the following actions, depending on the situation.

Situation	Steps
Create a reason list	1. Click **New**. 2. In the **Reason List** dialog box, on the **General** tab, type a name and optional

Situation	Steps
	description. 3. Verify that the **Is active** check box is selected to make the list available for assignment. 4. Optional. On the **List Members** tab, in the **Available** list, create, modify, or delete reasons. 5. On the **List Members** tab, in the **Selected** list, add, remove, or rearrange reasons. 6. Click **OK**.
Modify a reason list	1. Click **Modify**. 2. In the **Reason List** dialog box, on the **General** tab, change the name or description. 3. To enable or disable the list, clear or select the **Is active** check box. 4. Optional. On the **List Members** tab, in the **Available** list, create, modify, or delete reasons. 5. On the **List Members** tab, in the **Selected** list, add, remove, or rearrange reasons. 6. Click **OK**.
Delete a reason list	1. Select a reason list and click **Delete**. 2. In the **Delete Reason List** confirmation box, click **Yes**.

Workflow

About administering workflow processes

Perceptive Content Workflow lets you automate business processes and create review checkpoints.

After you have saved a document, the document can be routed through any number of queues, which might represent different departments or different desks within a department.

You enter Workflow Designer to create or modify workflow processes. Other workflow administration tasks are done through Management Console, such as deleting workflow processes, assigning workflow privileges, and handling reason lists.

Create a workflow process

A workflow process contains a series of tasks and rules reflecting the review path a workflow item must take in order to meet the sign off and approval requirements of your work group. To create a workflow process, complete the following steps.

1. In **Management Console**, in the left pane, under **Select Department**, select a department from the list.
2. In the left pane, click **Workflow**.
3. In the right pane, on the **Workflow** tab, click **New**.
4. In the **Add Process** dialog box, type a name and an optional description.

   The description appears in the ToolTip for the process.
5. Click **OK**.

Next Create queues, routes, and rules to define the components in your new workflow process in Workflow Designer.

Modify a workflow process

To modify a workflow process, complete the following steps.

Prerequisite All other users must close the process.

1. In **Management Console**, in the left pane, under **Select Department**, select a department from the list.
2. In the left pane, click **Workflow**.
3. In the right pane, on the **Workflow** tab, select a process and then click **Modify**.
4. When you are finished modifying your workflow process, close **Workflow Designer**.

Rename a workflow process

To change the name of a workflow process, complete the following steps.

1. In **Management Console**, in the left pane, under **Select Department**, select a department from the list.
2. In the left pane, click **Workflow**.
3. In the right pane, on the **Workflow** tab, select a process and then click **Rename**.
4. Enter a new name for your process.

Delete a workflow process

To delete a workflow process and remove all workflow items in its associated queues from workflow, complete the following steps.

Prerequisite All users must close the process before it can be deleted.

1. In **Management Console**, in the left pane, under **Select Department**, select a department from the list.

2. In the left pane, click **Workflow**.
3. On the **Workflow** tab, select a process and then click **Delete**.
4. In the **Delete Process** confirmation box, to remove items from the queues in this process and then delete the process, select the **Remove all items from workflow and then delete this process** check box and then click **Yes**.

Reasons

What is a reason list?

Reason lists provide users the ability to indicate why they are putting a workflow item on hold.

When putting an item on hold in a workflow queue, users are prompted to select a reason from a reason list. As manager of a workflow process, you control the contents of every On Hold reason list. You can define a reason list as part of a workflow queue's properties.

Add a reason list for putting an item on hold

When putting an item on hold in a workflow queue, the user must select the reason for the change from a reason list. To create and edit a reason list, complete the following steps.

1. Complete one of the following actions, depending on the situation.

Situation	Steps
Create a hold reason list in Perceptive Content	1. In **Management Console**, in the left pane, under **Select Department**, select a department from the list. 2. In the left pane, click **Workflow**. 3. On the **Reason Lists** tab, click **New**.
Create a hold reason list in **Workflow Designer**	1. In **Workflow Designer**, double-click the queue. 2. In the **Queue Properties** dialog box, click **Reasons > New**.

2. In the **Reason List** dialog box, type a name and optional description for the reason list and then leave the **Is active** check box selected.
3. On the **List Members** tab, add, remove, and rearrange reasons as necessary.
4. Click **OK**.

Modify or rename a reason list for putting an item on hold

Reason lists are created to provide users with predefined reasons for putting workflow items on hold. To modify a reason list for putting an item on hold, complete the following steps.

1. Complete one of the following actions, depending on the situation.

Situation	Steps
Modify a hold reason list in **Management Console**	1. In **Management Console**, in the left pane, under **Select Department**, select a department from the list. 2. In the left pane, click **Workflow**. 3. Click the **Reason Lists** tab. 4. Click the list you want to change and then click **Modify**.
Modify a hold reason list in **Workflow Designer**	1. Double-click the queue. 2. In the **Queue Properties** dialog box, click **Reasons** in the left pane. 3. In the **Select a reason list to use when placing items On Hold in this queue** list, click the list you want to change and then click **Modify**.

2. In the **Reason List** dialog box, on the **General** tab, change the name and description if necessary.

   Note: You cannot change the name of a system list (Apply Signature, Void/Expire Digital ID, or Void Signature).

3. To make the reason list inactive, clear the **Is active** check box.

   Note: You cannot disable a system list.

4. In the **List Members** tab, add, remove, or rearrange reasons.
5. Click **OK**.

Delete a reason list for putting an item on hold

To delete a reason list for putting an item on hold, complete the following steps.

You cannot remove a system list (Apply Signature, Void/Expire Digital ID, or Void Signature).

1. In **Management Console**, in the left pane, under **Select Department**, select a department from the list.
2. In the left pane, click **Workflow**.

3. Click the **Reason Lists** tab.
4. Click the reason list you want to delete and then click **Delete**.

Output Profiles

What is an output profile?

An output profile allows you to save output packaging configuration settings for reuse.

After you create an output profile, the system automatically sets the settings each time you select an output method and an associated profile. You can create, modify, and delete output profiles for all four output methods: email, fax, file, and print.

Although output packaging can handle large and complex output jobs, it is a client-side process designed for smaller, ad-hoc output jobs. Outputting a large job may take several minutes to complete. The system notifies you when the process starts and ends. Until then, you can continue to work in Perceptive Content.

For large and complex output jobs, consider using Output Agent, a server-side process that allows you to output items on a job-by-job basis or in a batch.

Create an email output profile overview

To create an output profile users can specify when emailing items, complete the following sequence of procedures.

1. Create an output profile.
2. Add a user or group to an output profile.
3. If emailing attachments, complete one of the following procedures.
   - Output items as a single PDF
   - Output item as a multi-page TIFF
4. If emailing attachments: Define output content settings.
5. Activate an output profile.

Create a fax output profile overview

To create a fax output profile, complete the following sequence of procedures.

1. Create an output profile.
2. Add a user or group to an output profile.
3. Define fax settings for an output profile.
4. Define output content settings.
5. Define document type output order.
   This procedure only applies to documents.
6. Activate an output profile.

Create a file output profile overview

To create an output profile that allows users to export items to a file, complete the following sequence of procedures.

1. Create an output profile.
2. Add a user or group to an output profile.
3. Define file settings for an output profile.
4. Perform one of the following content options.
   - Output items as individual files.
   - Output item as a multipage tiff
   - Output items as a single PDF.
5. Optional. Create a folder hierarchy for output files.
6. Define output content settings.
7. Define document type output order.

   This procedure applies only to documents.
8. Activate an output profile.

Create a print output profile overview

To create a print output profile users can select when printing items, complete the following sequence of procedures.

1. Create an output profile.
2. Add a user or group to an output profile.
3. Define output content settings.
4. Define document type output order.

   > **Note:** This procedure applies only to documents.

5. Activate an output profile.

Define page rotation for printing

To define whether the system automatically rotates a page image when the page orientation does not match the printer sheet orientation, complete the following steps.

1. In the imagenow.ini file under `[Printer]`, for the **printer.rotate.to.best.fit** setting, type one of the following options.
   - `TRUE` to rotate page images to match printer sheet orientation.
   - `FALSE` to maintain the page image during printing.

   The default setting is FALSE.
2. Save and close the file.

Copy an output profile

To copy an output profile, complete the following steps.

1. In **Management Console**, in the left pane, click **Output Profiles.**
2. In the right pane, click the appropriate output method tab.
3. Select the output profile and then click **Copy**.
4. In the **Output Profile** dialog box, in the **Name** field, type a name for the new profile, and then click **OK**.

Delete an output profile

To delete an output profile, complete the following steps.

1. In **Management Console**, in the left pane, click **Output Profiles**.
2. In the right, click the appropriate output method tab.
3. Select the output profile and then click **Delete**.
4. In the confirmation prompt, click **Yes**.

Modify an output profile

To modify settings of an output profile, complete the following steps.

1. In **Management Console**, in the left pane, click **Output Profiles**.
2. In the right pane, click the appropriate output method tab.
3. Select the profile and then click **Modify**.
4. Modify the output profile settings.
5. Click **OK**.

Rename an output profile

To rename an output profile, complete the following steps.

1. In **Management Console**, in the left pane, click **Output Profiles**.
2. In the right pane, click the appropriate output method tab.
3. Select the output profile and then click **Rename**.
4. Type the new name of your output profile and press `ENTER`.

Activate an output profile

To activate an output profile that can be selected when printing, emailing, exporting, or faxing an item, complete the following steps.

1. In **Management Console**, in the left pane, click **Output Profiles**.
2. In the right pane, click the output method tab, select the output profile, and click **Modify**.
3. On the **General** tab, select **Is active**.
4. Click **OK**.

Define email settings for an output profile

To define the settings to use when emailing an item, complete the following steps.

1. In **Management Console**, in the left pane, click **Output Profiles**.
2. In the right pane, click the **Email** tab, select the output profile, and click **Modify**.
3. On the **Output** tab, for **Email**, perform one of the following actions.
   - Type the email address where you want to send the output file.
   - Leave the box empty to select the email address from the address book of your email client.
4. In the **Method** list, select a method for sending the email.
5. If you select **Attachment**, under **Annotations**, for **Include**, select one of the following options.
   - **Annotations** to output the item with annotations.
   - **No annotations** to output the item without annotations.
   - **Current view** to output the current view of the item.
6. Click **OK**.

Define fax settings for an output profile

To define the fax number and cover page information to use when exporting an item to fax using an output profile, complete the following steps.

1. In **Management Console**, in the left pane, click **Output Profiles**.
2. In the right pane, on the **Fax** tab, select the output profile you want to modify, and click **Modify**.
3. In the **Output Profile** dialog box, on the **Output** tab, under **General**, perform one of the following options.
   - If you have added fax numbers to your address book, select the number from the **Fax Number** list.
   - If you are using a number that is not in your address book, enter the fax number to where you want to send the item.
4. Under **Cover Page**, perform any of the following actions to add content to the fax cover page.
   - In the **Attention** box, type the name of the recipient of the fax.
   - In the **Comments** box, type any additional information you want to include with the fax.
5. Under **Annotations**, for **Include**, select one of the following options.
   - **Annotations** to output the item with annotations.
   - **Current view** to output the current view of the item.
   - **No annotations** to output the item without annotations.
6. Click **OK**.

Define file settings for an output profile

To define the file format and location when exporting items to a file using an output profile, complete the following steps.

1. In **Management Console**, in the left pane, click **Output Profiles**.

2. In the right pane, on the **File** tab, select the output profile you want to modify, and click **Modify**.
3. In the **Output Profile** dialog box, on the **Output** tab, for **Format**, select an output format.
4. To set the output directory, next to **Location**, click **Browse** and choose a location to store the output files.

   Note:
   You must set a location. If you do not set one, the system prompts you with an error each time you try to use the profile.

5. Under **Annotations**, for **Include**, select one of the following options.
   - **Annotations** to output the item with annotations.
   - **Current view** to output the current view of the item.
   - **No annotations** to output the item without annotations.
6. Click **OK**.

Output file name variables

The following topic lists the variable text you can use when generating a custom file name to email an item as an attachment or export an item to a file.

Note:
You can only use these variables with the multi-page TIFF and Individual file export formats. The Single PDF file export does not support using these variables.

Guidelines

When entering variables, separate text with underscores and enclose variables with square brackets. The entire file path, which includes the file name and extension, cannot exceed the character limit of your operating system.

Variables

Variable	Description	Example
[DOCID]	The item ID	Document_[DOCID]
[DRAWER]	The item drawer value	[DOCID]_Account_[DRAWER]
[FIELD1]	The item Field1 value	[DOCID]_Account_[FIELD1]
[FIELD2]	The item Field2 value	[DOCID]_Patient_[FIELD2]

Variable	Description	Example
[FIELD3]	The item Field3 value	[DOCID]_Invoice_[FIELD3]
[FIELD4]	The item Field4 value	[DOCID]_Student_[FIELD4]
[FIELD5]	The item Field5 value	[DOCID]_Program_[FIELD5]
[DOCTYPE]	The item type	[DOCTYPE]_[DOCID]

Manage digital signatures

What is a digital signature?

A digital signature is an electronic certification that represents the act of signing the document using the Perceptive Content interface.

Digital signatures play an important role in moving processing from paper to electronic systems. A digital signature is usually a cryptographic signature. Although you use digital signatures to electronically replace a handwritten signature, they are not images of handwritten signatures. According to the E-SIGN Act of 2000, digital signatures are legally binding as long as they meet the provisions outlined in the laws governing their use.

Digital signatures provide four benefits for documents:

- Authenticity, which provides proof of the identity of the individual who signs a document.
- Data integrity, which ensures that the document has not been altered by a third-party.
- Non-repudiation, which prevents the signer of a document from later denying association with that document.
- Confidentiality, which ensures that data is only readable to the sender and the intended recipient, providing protection from third party snooping.

Digital signature functionality is separately purchased and licensed as part of the Document Control Suite. Digitally signing a document requires that it be checked in to version control. Once signed, the document is made secure from alterations to the signed version. Signing a document entails entering a password, selecting a reason for the signature, and optionally placing one or more visual representations of the signature on the document. Perceptive Content automatically generates a Digital ID for the signing user if none exists. Otherwise, it uses the existing Digital ID to encrypt the digital signature.

After a document has been digitally signed, any user who can access the document can verify the signature. When a document is opened, the signature is automatically authenticated against the stored hash value of the document that was generated at the time of signing. Verifying a digitally signed document recalculates the document hash value and compares it with the signature to get real-time status. If the recalculated hash value matches the signature, the signature is validated; if the hash value does not match the signature (which could indicate tampering with the document outside of Perceptive Content), the signature is marked invalid.

A document can have multiple valid signatures by a signer, and you can place as many visual representations of your signature on the document as you like. However, visual representations are only supported on images on which annotations are supported (TIFF, JPEG, and BMP).

Digital signature status indicators

Any document that contains a digital signature, either in its current version or in a previous version, is accompanied by a status indicator in the search results grid in the Digitally Signed column. If your view does not show this column, you can temporarily display it by clicking the Columns button and selecting the Signature Status check box, or you can add the column in a private filter.

Status indicators

Status Indicator	Label	Description
[No icon]	none	The document has not been signed.
	Valid	This signature has been validated.
	Invalid	This signature is no longer valid because the document has been corrupted or compromised by changes made outside of Perceptive Content. To determine whether any signature is invalid, Perceptive Content verifies all signatures on a document when the user opens it or verifies signatures manually or automatically.
	Voided	This signature has been voided either because the signer has voided the signature or because a user with the Void Signature privilege has voided the signature.
	Previously Signed	Previous versions of this document are signed.

Documents with multiple signatures

If a document contains multiple signatures, only one icon appears, according to the following precedence rules:

- If any signature in the list is invalid, the invalid icon is shown.
- If the document contains a at least one valid signature and no invalid signatures, the valid icon is shown.
- If the document contains only voided signatures, the voided icon is shown.

Additional signature locations

The indicators also appear in the following locations:

- At the right end of the Viewer status bar
- In the Properties pane of the Viewer
- In a representation on the document (if the file type of the document permits annotations)

Digital Signature Settings

Set password entry frequency

To set the time elapsed before a user is prompted to enter his digital signature password again, complete the following steps.

1. In **Management Console**, in the left pane, click **Digital Signatures**.
2. On the **Digital Signatures** tab, under **Signing Password**, in the list, select how often users must enter a password when signing documents.

Set digital signature time out

The time-out feature requires a user who digitally signed a document, but who did not log out before the specified time out value, to re-enter his or her digital signature password. The time out applies globally to all digital signatures. To set digital signature time out, complete the following steps.

1. In **Management Console**, in the left pane, click **Digital Signatures**.
2. On the **Digital Signatures** tab, under **Signing Password**, set the **Prompt user to enter password** option to **Once per session**.
3. In the **Password time out** list, select the amount of time to elapse between the last digital signature activity and timing out (which requires the user to re-enter his or her digital signature password).

   Note: The timeout value can range from **Never** (the default) to specific time values up to 60 minutes.

4. Repeat the previous step for the password time out list, which can have a different value.

Append signature reports to printed or exported documents

To include a digital signature report whenever signed documents are printed or exported, complete the following steps.

These options apply globally to all digital signatures. These reports are printed only when a document is printed in its entirety.

1. In **Management Console**, in the left pane, click **Digital Signatures**.
2. On the **Digital Signatures** tab, under **Digital Signature Report,** select the **Include a Digital Signature report for all signed documents** check box to cause **Perceptive Content** to print a report whenever a user prints or exports a signed version of a document.

> **Note:** You can also clear the check box to disable this option. When this check box is cleared, no report is printed.

3. In the **For each report display** list, select a display option for the reports.

Automatically verify signatures

You can apply automatic verification of signatures to all documents that have a common drawer or document type. To activate automatic verification of signatures, complete the following steps.

Applying this setting to a large number of documents can occasionally slow performance of ImageNow Server.

1. Depending on which category of documents you want to affect, in **Management Console**, in the left pane, click **Drawers** or **Document Types**.
2. In the right pane, click the drawer or document type for which signatures will be automatically verified, and then click **Modify**.
3. Do one of the following actions:
   - In the **Drawer** dialog box, on the **Digital Signatures** tab, select the **Automatically verify signatures for this drawer** check box.
   - In the **Document Type** dialog box, on the **Digital Signatures** tab, select the **Automatically verify signatures for this document type** check box.
4. To specify how often the signatures are verified, in the **Verification interval** boxes, select the number and time unit and then click **OK**.
5. Optional. Repeat this procedure for any additional drawers or document types to which automatic signature verification must be applied.

Associate a digital signature with a task

To associate a digital signature with a task, complete the following steps.

1. In **Management Console**, in the left pane, under **Select Department**, select a department from the list.
2. In the left pane, click **Tasks**.
3. On the **Templates** tab, in the **Select a task type** list, select **Signature required on document**.

> **Note:** You can associate a digital signature only with tasks that have a task type of **Signature required on document**.

4. Select the task with which you want to associate a digital signature and then click **Modify**.
5. In the **Signature Required on Document Task** dialog box, in the left pane, click **Reasons**.
6. In the right pane, under **Action Reasons**, select the reason list to present to the user in the action reasons of the task.
7. In the right pane, under **Return Reasons**, select the reason list to present to the user in the return reasons of the task.
8. Click **OK**.

Void a digital signature

To void a digital signature applied to a document by yourself or another user, complete the following steps.

1. Open the document.
2. If the **Properties** pane is not visible, click **View > Digital Signatures**.
3. In the **Digital Signatures** pane, double-click the row that contains the digital signature you want to void.
4. In the **Digital Signature** dialog box, click **Void**, select a reason for voiding the digital signature, and then click **Close**.

Digital IDs

Set Digital ID expiration period

This procedure applies globally to all Digital IDs. To set the number of days before a Digital ID automatically expires, complete the following steps.

1. In **Management Console**, in the left pane, click **Digital Signatures**.
2. On the **Digital Signatures** tab, under **Digital ID Expiration**, in the **Expire** list, select the default expiration period.
3. If you selected **Custom interval after creation date**, in the **Interval** box, type or select the number of days for the expiration period.

Expire a Digital ID

Expiring a Digital ID enables a user to create another Digital ID and re-enter password information. To expire a Digital ID, complete the following steps.

1. In **Management Console**, in the left pane, click **Users**.
2. In the right pane, on the **User Profiles** tab, search for the user you want and click **Modify**.
3. In the **Modify User Profile** dialog box, complete the following substeps:
    1. On the **Digital ID** tab, select the Digital ID you want to expire.
    2. Click **Expire**.
4. In the **Expire Digital ID** dialog box, complete the following substeps:
    1. In the **Date** list, select the date on which to make the expiration effective.
    2. In the **Reason** list, select the reason for expiring the Digital ID.
    3. Click **OK**.
5. In the **Modify User Profile** dialog box, click **OK**.

Void a Digital ID

Voiding a Digital ID voids all signatures associated with that ID. If you only want to allow a user to create another Digital ID and re-enter password information, expire the Digital ID instead. To void a digital ID, complete the following steps.

Depending on the number of signatures previously created with the Digital ID that you void, and the size of the document images, ImageNow Server might require a long period of time to process the request.

1. In **Management Console**, in the left pane, click **Users**.
2. In the right pane, on the **User Profiles** tab, search for the user you want and click **Modify**.
3. In the **Modify User Profile** dialog box, complete the following substeps.
   1. On the **Digital ID** tab, select the Digital ID you want to void.
   2. Click **Void**.
4. In the **Void Digital ID** dialog box, complete the following substeps.
   1. In the **Reason** list, select the reason for voiding the Digital ID.
   2. Click **OK**.
5. In the **Modify User Profile** dialog box, click **OK**.

Reason Lists

Add a reason list for digital signatures

When completing a signature-required task, users must select the reason for using the signature from a reason list. To create and edit a digital signature's reason list, complete the following steps.

Changes you make to reason lists used for applying a signature, voiding a signature, or voiding or expiring a Digital ID must be performed within the existing system reason lists.

1. In **Management Console**, in the left pane, click **Digital Signatures**.
2. In the **Reason Lists** tab, click **New**.
3. In the **Reason List** dialog box, type the name and optional description for the reason list, and then ensure that the Is active check box selected.
4. In the**List Members** tab, add one or more reasons to the new list and rearrange their order as necessary:
   - To add a reason to the list, click it in the upper list and then click **Add**.
   - To remove a reason from the list, click in the lower list and then click **Remove**.
   - To change the position of a reason in the list, click it in the lower list and then click **Move Up** or **Move Down**.
5. Click **OK**.

Modify or rename a reason list for a digital signature

To modify reasons that are displayed when a user signs a document, voids a document, or voids a Digital ID, complete the following steps.

You cannot modify, rename, or hide a system list.

1. In **Management Console**, in the left pane, click **Digital Signatures**.
2. Click the **Reason Lists** tab.
3. Click the list you want to change and then click **Modify**.
4. In the **Reason List** dialog box, in the **General** tab, change the name and description if necessary.
5. To hide the reason list from the user, clear the **Is active** check box.

   Note: You cannot hide a system list.

6. In the **List Members** tab, do one or more of the following:
   - To add a reason to the list, click it in the upper list and then click **Add**.
   - To remove a reason from the list, click in the lower list and then click **Remove**.
   - To change the position of a reason in the list, click it in the lower list and then click **Move Up** or **Move Down**.
7. Click **OK**.

Delete a reason list for digital signatures

To delete a reason list for digital signatures, complete the following steps.

You cannot remove a system list (Apply Signature, Void/Expire Digital ID, or Void Signature).

1. In **Management Console**, in the left pane, click **Digital Signatures**.
2. Click the **Reason Lists** tab.
3. Click the reason list you want to delete and then click **Delete**.

Manage annotations

What is an annotation template?

***Annotation templates allow users to add standardized annotations to an item.

Users can annotate an item without affecting the original image. Each annotation requires an annotation template.

You specify the security options based on the template. In the annotation template, you can grant users or groups the privilege to create, delete, hide, modify and view specific annotation templates.

For example, you can create a Stamp template with the following text: Received by Accounts Payable. You can set the template security so that only users in the Accounts Payable group can use, modify, or delete annotations created using that Stamp template. If you do not grant users in the Human Resources access to view stamps created using that stamp template, those users cannot view, modify, or delete this annotation.

You can remove an annotation template from the Management Console list displayed to users without deleting the template completely. You can also remove (without deleting) an annotation type such as check, stamp, or line from the Annotation toolbar.

File formats for annotations and redactions

The following table shows the file formats you can annotate and redact using Perceptive Content.

Format	Annotate	Redact
BMP (24 bit, or lower)	Yes	Yes
GIF	No	No
JPG	Yes	Yes
Microsoft Office documents	No	No
PNG	No	No
TIFF	Yes	Yes
LZW	No	No

You can also annotate any file type outside of Perceptive Content. To do this, make sure the file is in version control and then open the file, right-click the thumbnail, and select Launch Associated Application.

You can also annotate TIFF images using an external application. TIFF format is not standardized, however, so different applications might modify the baseline tags and prevent the externally-annotated TIFF file from being viewed in the ImageNowViewer or as thumbnails.

Stamp annotation codes

You can insert the following predetermined codes in a stamp or text annotation to represent current time, dates, and user attributes. For example, the default code "% m/%d/%y" displays the current date (month/day/year).

The following codes are available:

Code	Description	Example
%%	Percent sign	%
%a	Abbreviated weekday name	FRI
%A	Full weekday name	FRIDAY
%b	Abbreviated month name	OCT
%B	Full month name	OCTOBER
%c	Date and time representation appropriate for locale	10/18/01 10:15:45
%d	Day of month as decimal number (01-31)	18
%H	Hour in 24-hour format (00-23)	22
%I	Hour in 12-hour format (01-12)	10
%j	Day of year as decimal number (001-366)	245
%M	Minute as decimal number (00-59)	02
%m	Month as decimal number (00-12)	05
%m/%d/%y	Mm/ dd/ yy	10/18/01
%m/%d/%Y	Mm/ dd/ yyyy	10/18/2001
%p	Current locales AM/PM indicator for 12-hour clock	AM
%S	Second as decimal number (00-59)	45
%U	Week of year as decimal number, with Sunday as first date of week (00-51)	19

Code	Description	Example
%W	Week of year as decimal number, with Monday as first date of week (00-51)	20
%w	Weekday as decimal number (0-6; Sunday is 0)	5
%x	Date representation for current locale	10/18/01
d %X	Time representation for current locale	10:15:45
%Y	Year with century, as decimal number	2001
%y	Year without century, as decimal number (00-99)	01
%z or %Z	Time-zone name; no characters if time zone is unknown	CENTRAL STANDARD TIME
<user.d>	User description	plan assessment coord
<user.e>	User e-mail	Bwhite@conacm.xyz
<user.eid>	An identifier that logs the user in to a separate system, such as a business application	bwhite77
<user.f>	User fax number	999-000-0000
<user.fn>	User first name	bob
<user.l>	User location	san rafael
<user.ln>	User last name	white
<user.m>	User mobile number	999-000-0000
<user.o>	User organization	consolidated acme

Code	Description	Example
<user.ou>	User organizational unit	budgeting & Planning
<user.p>	User prefix	Dr.
<user.pa>	User pager number	999-000-0000
<user.ph>	User phone number	999-000-0000
<user.s>	User suffix	esq.
<user.t>	User title	vice president Planning
<user>	User name	Bob White

Create annotation templates

Create an arrow annotation template

To create an arrow annotation template, complete the following steps.

1. In **Management Console**, in the left pane, under **Select Department**, select a department from the list.
2. In the left pane, click **Annotations**.
3. In the right pane, perform the following steps.
   1. In the **Select an Annotation type** box, select **Arrow** and then click **New**.
   2. In the selected row under **Name**, type a name for the template and then press `ENTER`.
   3. Select the template and then click **Modify**.
4. In the **Arrow Annotation** dialog box, to define the arrow template properties, perform the following steps.
   1. In the left pane, select **Properties**.
   2. Optional. Supply a description for the annotation template.
   3. Under **Options**, verify that **Is Active** is selected so that it appears on the **Annotations** toolbar.
5. To change the appearance of the arrow template, in the **Arrow Annotation** dialog box, perform the following steps.
   1. In the left pane, select **Appearance**.
   2. In **Line Weight**, select the width of the arrow line.
   3. In **Line Color**, select a line color.

   > **Note:** When you select **Automatic Color** when modifying an annotation instance or creating an annotation template, the system applies black to the color property being modified.

6. To add security to the arrow template, in the **Arrow Annotation** dialog box, in the left pane, select **Security**.
7. Under **Users and Groups**, click **Add**.
8. In the **Select Users and Groups** dialog box, perform the following steps.
   1. To add a user, on the **Users** tab, search for and select a user and click **Add**.
   2. To add a group, on the **Groups** tab, search for and select a group and click **Add**.
   3. Add as many users or groups as necessary.
   4. Click **OK**.
9. In the **Arrow Annotation** dialog box, under **Users and Groups**, select the user or group you want to assign privileges to and grant or deny the necessary privileges.
10. Click **OK**.

Create a check annotation template

To create a check annotation template, complete the following steps.

1. In **Management Console**, in the left pane, under **Select Department**, select a department from the list.
2. In the left pane, click **Annotations**.
3. In the right pane, perform the following steps.
   1. In the **Select an Annotation type** list, select **Check** and then click **New**.
   2. In the selected row under **Name**, type a name for the template then press `Enter`.
   3. Select the template and then click **Modify**.
4. To define the check template properties, in the **Check Annotation** dialog box, perform the following steps.
   1. In the left pane, select **Properties**.
   2. Optional. Supply a description for the annotation template.
   3. Under **Options**, verify that **Is Active** is selected so that it appears on the **Annotations** toolbar.
5. To change the appearance of the check template, in the **Check Annotation** dialog box, perform the following steps.
   1. In the left pane, select **Appearance**.
   2. In **Line Color**, select a line color.

   > **Note:** When you select **Automatic Color** when modifying an annotation instance or creating an annotation template, the system applies black to the color property being modified.

6. To add security to the check template, in the **Check Annotation** dialog box, in the left pane, select **Security**.
7. Under **Users and Groups**, click **Add**.
8. In the **Select Users and Groups** dialog box, perform the following steps.
   1. To add a user, on the **Users** tab, search for and select a user and click **Add**.
   2. To add a group, on the **Groups** tab, search for and select a group and click **Add**.

   3. Add as many users or groups as necessary.
   4. Click **OK**.
9. In the **Check Annotation** dialog box, under **Users and Groups**, select the user or group you want to assign privileges to and grant or deny the necessary privileges.
10. Click **OK**.

Create a highlight annotation template

To create a highlight annotation template, complete the following steps.

1. In **Management Console**, in the left pane, under **Select Department**, select a department from the list.
2. In the left pane, click **Annotations**.
3. In the right pane, perform the following steps:
   1. In the **Select an Annotation type** box, select **Highlight** and then click **New**.
   2. In the selected row under **Name**, type a name for the template and then press `ENTER`.
   3. Select the template and then click **Modify**.
4. To define the highlight template properties, in the **Highlight Annotation** dialog box, perform the following steps.
   1. In the left pane, select **Properties**.
   2. Optional. Supply a description for the annotation template.
   3. Under **Options**, verify that **Is Active** is selected so that it appears on the **Annotations** toolbar.
5. To change the appearance of the highlight template, in the **Highlight Annotation** dialog box, perform the following steps.
   1. In the left pane, select **Appearance**.
   2. In **Fill Color**, select the highlight color.
6. To add security to the highlight template, in the **Highlight Annotation** dialog box, in the left pane, select **Security**.
7. Under **Users and Groups**, click **Add**.
8. In the **Select Users and Groups** dialog box, perform the following steps.
   1. To add a user, on the **Users** tab, search for and select a user and click **Add**.
   2. To add a group, on the **Groups** tab, search for and select a group and click **Add**.
   3. Add as many users or groups as necessary.
   4. Click **OK**.
9. In the **Highlight Annotation** dialog box, under **Users and Groups**, select the user or group you want to assign privileges to and grant or deny the necessary privileges.
10. Click **OK**.

Create a line annotation template

To create a line annotation template, complete the following steps.

1. In **Management Console**, in the left pane, under **Select Department**, select a department from the

list.

2. In the left pane, click **Annotations**.
3. In the right pane, perform the following steps.
    1. In the **Select an Annotation type** box, select **Line** and then click **New**.
    2. In the selected row under**Name**, type a name for the template and then press `ENTER`.
    3. Select the template and then click **Modify**.
4. To define the line template properties, in the **Line Annotation** dialog box, perform the following steps.
    1. In the left pane, select **Properties**.
    2. Optional. Supply a **Description** for the annotation template.
    3. Under **Options**, verify that **Is Active** is selected so that it appears on the **Annotations** toolbar.
5. To change the appearance of the line template, in the **Line Annotation** dialog box, perform the following steps.
    1. In the left pane, select **Appearance**.
    2. In **Line Weight**, select the width of the line.
    3. In **Line Color**, select a line color.

    > **Note:** When you select **Automatic Color** when modifying an annotation instance or creating an annotation template, the system applies black to the color property being modified.

6. To add security to the line template, in the **Line Annotation** dialog box, in the left pane, select **Security**.
7. Under **Users and Groups**, click **Add**.
8. In the **Select Users and Groups** dialog box, perform the following steps.
    1. To add a user, on the **Users** tab, search for and select a user and click **Add**.
    2. To add a group, on the **Groups** tab, search for and select a group and click **Add**.
    3. Add as many users or groups as necessary.
    4. Click **OK**.
9. In the **Line Annotation** dialog box, under **Users/Groups**, select the user or group you want to assign privileges to and grant or deny the necessary privileges.
10. Click **OK**.

Create an OLE annotation template

To create an OLE annotation template, complete the following steps.

1. In **Management Console**, in the left pane, under **Select Department**, select a department from the list.
2. In the left pane, click **Annotations**.
3. In the right pane, perform the following steps.
    1. In the **Select an Annotation type** box, select **OLE** and then click **New**.
    2. In the selected row under **Name**, type a name for the template and then press `ENTER`.

   3. Select the template and then click **Modify**.
4. To define the OLE template properties, in the **OLE Annotation** dialog box, perform the following steps.
   1. In the left pane, select **Properties**.
   2. Optional. Supply a description for the annotation template.
   3. Under **Options**, verify that **Is Active** is selected so that it appears on the **Annotations** toolbar.
5. To add security to the OLE template, in the **OLE Annotation** dialog box, in the left pane, select **Security**.
6. Under **Users and Groups**, click **Add**.
7. In the **Select Users and Groups** dialog box, perform the following steps.
   1. To add a user, on the **Users** tab, select a user and click **Add**.
   2. To add a group, on the **Groups** tab, search for and select a group and click **Add**.
   3. Add as many users or groups as necessary.
   4. Click **OK**.
8. In the **OLE Annotation** dialog box, under **Users and Groups**, select the user or group you want to assign privileges to and grant or deny the necessary privileges.
9. Click **OK**.

Create an oval annotation template

To create an oval annotation template, complete the following steps.

1. In **Management Console**, in the left pane, under **Select Department**, select a department from the list.
2. In the left pane, click **Annotations**.
3. In the right pane, perform the following steps.
   1. In the **Select an Annotation Type** box, select **Oval** and then click **New**.
   2. In the selected row under **Name**, type a name for the template and then press `ENTER`.
   3. Select the template and then click **Modify**.
4. To define the oval template properties, in the **Oval Annotation** dialog box, perform the following steps.
   1. In the left pane, select **Properties**.
   2. Optional. Supply a description for the oval template.
   3. Under **Options**, verify that **Is Active** is selected so that it appears on the **Annotations** toolbar.
5. To change the appearance of the oval template, in the **Oval Annotation** dialog box, perform the following steps.
   1. In the left pane, select **Appearance**.
   2. In **Line Weight**, select the width of the oval s border.
   3. In **Line Color**, select a line color for the oval s border.

   > **Note:** When you select **Automatic Color** when modifying an annotation instance or creating an annotation template, the system applies black to the color property being modified.

    4. To fill the oval with color, remove the selection from **No Fill** and, in **Fill Color**, select a color.
    5. To remove the fill color, select **No Fill**.
6. To add security to the template, in the **Oval Annotation** dialog box, in the left pane, select **Security**.
7. Under **Users and Groups**, click **Add**.
8. In the **Select Users and Groups** dialog box, perform the following steps.
    1. To add a user, on the **Users** tab, search for and select a user and click **Add**.
    2. To add a group, on the **Groups** tab, search for and select a group and click **Add**.
    3. Add as many users or groups as necessary.
    4. Click **OK**.
9. In the **Oval Annotation** dialog box, under **Users and Groups**, select the user or group you want to assign privileges to and grant or deny the necessary privileges.
10. Click **OK**.

Create a pen annotation template

To create a pen annotation template, complete the following steps.

1. In **Management Console**, in the left pane, under **Select Department**, select a department from the list.
2. In the left pane, click **Annotations**.
3. In the right pane, perform the following steps.
    1. In the **Select an Annotation Type** box, select **Pen** and then click **New**.
    2. In the selected row under **Name**, type a name for the template and then press `ENTER`.
    3. Select the template and then click **Modify**.
4. To define the pen template properties, in the **Pen Annotation** dialog box, perform the following steps:
    1. In the left pane, select **Properties**.
    2. Optional. Supply a **Description** for the annotation template
    3. Under **Options**, verify that **Is Active** is selected so that it appears on the **Annotations** toolbar.
5. To change the appearance of the pen template, in the **Pen Annotation** dialog box, perform the following steps:
    1. In the left pane, select **Appearance**.
    2. In **Line Weight**, select the width of the line.
    3. In **Line Color**, select a line color.

    > **Note:** When you select **Automatic Color** when modifying an annotation instance or creating an annotation template, the system applies black to the color property being modified.

6. To add security to the pen template, in the **Pen Annotation** dialog box, in the left pane, select **Security**.
7. Under **Users and Groups**, click **Add**.
8. In the **Select User and Groups** dialog box, perform the following steps.

    1. To add a user, on the **Users** tab, search for and select a user and click **Add**.
    2. To add a group, on the **Groups** tab, search for and select a group and click **Add**.
    3. Add as many users or groups as necessary.
    4. Click **OK**.
9. In the **Pen Annotation** dialog box, under **Users and Groups**, select the user or group you want to assign privileges to and grant or deny the necessary privileges.
10. Click **OK**.

Create a rectangle annotation template

To create a rectangle annotation template, complete the following steps.

1. In **Management Console**, in the left pane, under **Select Department**, select a department from the list.
2. In the left pane, click **Annotations**.
3. In the right pane, perform the following steps.
    1. In the **Select an Annotation Type** box, select **Rectangle** and then click **New**.
    2. In the selected row under **Name**, type a name for the template and then press `ENTER`.
    3. Select the template and then click **Modify**.
4. To define the rectangle template properties, in the **Rectangle Annotation** dialog box, perform the following steps.
    1. In the left pane, select **Properties**.
    2. Optional. Supply a **Description** for the annotation template.
    3. Under **Options**, verify that **Is Active** is selected so that it appears on the **Annotations** toolbar.
5. To change the appearance of the rectangle template, in the **Rectangle Annotation** dialog box, perform the following steps.
    1. In the left pane, select **Appearance**.
    2. In **Line Weight**, select the width of the rectangle's border.
    3. In **Line Color,** select a line color for the border of the rectangle.

    > **Note:** When you select **Automatic Color** when modifying an annotation instance or creating an annotation template, the system applies black to the color property being modified.

    4. To fill the rectangle with color, remove the selection from **No Fill** and, in **Fill Color**, select a color.
    5. Optional. To remove the fill color, select **No Fill**.
6. To add security to the rectangle template, in the **Rectangle Annotation** dialog box, in the left pane, select **Security**.
7. Under **Users and Groups**, click **Add**.
8. In the **Select Users and Groups** dialog box, perform the following steps.
    1. To add a user, on the **Users** tab, search for and select a user and click **Add**.
    2. To add a group, on the **Groups** tab, search for and select a group and click **Add**.

   3. Add as many users or groups as necessary.
   4. Click **OK**.
9. In the **Rectangle Annotation** dialog box, under **Users and Groups**, select the user or group you want to assign privileges to and grant or deny the necessary privileges.
10. Click **OK**.

Create a redaction annotation template

To create a redaction annotation template, complete the following steps.

1. In **Management Console**, in the left pane, under **Select Department**, select a department from the list.
2. In the left pane, click **Annotations**.
3. In the right pane, perform the following steps.
   1. In the **Select an Annotation type** box, select **Redaction** and then click **New**.
   2. In the selected row under **Name**, type a name for the template and then press `ENTER`.
   3. Select the template and then click **Modify**.
4. To define the redaction annotation template properties, in the **Redaction Annotation** dialog box, perform the following steps.
   1. In the left pane, select **Properties**.
   2. Optional. Supply a **Description** for the annotation template.
   3. Under **Options**, verify that **Is Active** is selected so that it appears on the **Annotations** toolbar.
5. To change the appearance of the redaction template, in the **Redaction Annotation** dialog box, perform the following steps.
   1. In the left pane, select **Appearance**.
   2. In **Fill Color**, select a color for the redaction area.
6. To add security to the redaction template, in the **Redaction Annotation** dialog box, in the left pane, select **Security**.
7. Under **Users and Groups**, click **Add**.
8. In the **Select Users and Groups** dialog box, perform the following steps.
   1. To add a user, on the **Users** tab, search for and select a user and click **Add**.
   2. To add a group, on the **Groups** tab, search for and select a group and click **Add**.
   3. Add as many users or groups as necessary.
   4. Click **OK**.
9. In the **Redaction Annotation** dialog box, under **Users and Groups**, select the user or group you want to assign privileges to and grant or deny the necessary privileges.
10. Click **OK**.

Create a stamp annotation template

To create a stamp annotation template, complete the following steps.

1. In **Management Console**, in the left pane, under **Select Department**, select a department from the

list.

2. In the left pane, click **Annotations**.
3. In the right pane, perform the following steps.
   1. In the **Select an Annotation Type** box, select **Stamp** and then click **New**.
   2. In the selected row under **Name**, type a name for the template and then press `ENTER`.
   3. Select the template and then click **Modify**.
4. To define the stamp annotation template properties, in the **Stamp Annotation** dialog box, perform the following steps.
   1. In the left pane, select **Properties**.
   2. Optional. Supply a description for the annotation template.
   3. Under **Options**, verify that **Is Active** is selected so that it appears on the **Annotations** toolbar.
5. To add text to the stamp template, in the **Stamp Annotation** dialog box, perform the following steps.
   1. In the left pane, select **Content**.
   2. Click **Text**, and then type the text you want in the field.
   3. To insert a time or user code in the text, click the insertion point in the field and then click **Insert**.
   4. In the **Insert Date/Time/User Code** dialog box, select a code to add and then click **Insert**.
   5. Optional. To display the current date and time for this stamp type instead of when the stamp was created, select **Enable dynamic code values**.
6. To add a picture to the stamp template, in the **Stamp Annotation** dialog box, perform the following steps.
   1. In the left pane, select **Content**.
   2. Click **Picture**, and then click **Browse**.
   3. In the **Stamp Annotation Picture** dialog box, navigate to the picture and then click **Open**.
7. To change the shape of the stamp template, in the **Stamp Annotation** dialog box, perform the following steps.
   1. If you selected text content, in the left pane, select **Appearance**.
   2. In **Frame**, select the type of frame you want.
   3. If you select **Rounded Rectangle**, in **Roundness**, click a number that represents the shape of the corners, the lower the number produces squarer corners and the higher the number produces more curved corners.
   4. In **Margins**, select a number representing the margin surrounding the text.
   5. For the border, in **Line Weight**, select the width of the border line, and in **Line Color**, select a color.
   6. To fill the stamp with color, remove the selection from **No Fill** and, in **Fill Color**, select a color.
   7. To remove the fill color, select **No Fill**.
8. To change the font, in the **Stamp Annotation** dialog box, perform the following steps.
   1. If you selected text content, in the left pane, select **Appearance**.
   2. In **Face**, select a typeface.
   3. In **Style**, select **B** for bold, **I** for italic, **U** for underline, or **S** for strikeout text.

    4. In **Size**, choose the font size.
    5. In **Alignment**, select the type of alignment you need for the text.
    6. In **Color**, select the text color.
9. To add security to the stamp template, in the **Stamp Annotation** dialog box, in the left pane, select **Security**.
10. Under **Users and Groups**, click **Add**.
11. In the **Select Users and Groups** dialog box, perform the following steps.
    1. To add a user, on the **Users** tab, search for and select a user and click **Add**.
    2. To add a group, on the **Groups** tab, search for and select a group and click **Add**.
    3. Add as many users or groups as necessary.
    4. Click **OK**.
12. In the **Stamp Annotation** dialog box, under **Users and Groups**, select the user or group you want to assign privileges to and grant or deny the necessary privileges.
13. Click **OK**.

Create a sticky note annotation template

To create a sticky note annotation template, complete the following steps.

1. In **Management Console**, in the left pane, under **Select Department**, select a department from the list.
2. In the left pane, click **Annotations**.
3. In the right pane, perform the following steps.
    1. In the **Select an Annotation Type** box, select **Sticky Note** and then click **New**.
    2. In the selected row under **Name**, type a name for the template and then press `ENTER`.
    3. Select the template and then click **Modify**.
4. To define the sticky note template properties, in the **Sticky Note Annotation** dialog box, perform the following steps.
    1. In the left pane, select **Properties**.
    2. Optional. Supply a description for the annotation template.
    3. Under **Options**, verify that **Is Active** is selected so that it appears on the **Annotations** toolbar.
5. To add security to the check template, in the **Check Annotation** dialog box, in the left pane, select **Security**.
6. Under **Users and Groups**, click **Add**.
7. In the **Select Users and Groups** dialog box, perform the following steps.
    1. To add a user, on the **Users** tab, search for and select a user and click **Add**.
    2. To add a group, on the **Groups** tab, search for and select a group and click **Add**.
    3. Add as many users or groups as necessary.
    4. Click **OK**.
8. In the **Sticky Note Annotation** dialog box, under **Users and Groups**, select the user or group you

want to assign privileges to and grant or deny the necessary privileges.

9. Click **OK**.

Create a text annotation template

To create a text annotation template, complete the following steps.

1. In **Management Console**, in the left pane, under **Select Department**, select a department from the list.
2. In the left pane, click **Annotations**.
3. In the right pane, perform the following steps.
   1. In the **Select an Annotation type** box, select **Text** and then click **New**.
   2. In the selected row under **Name**, type a name for the template and then press `ENTER`.
   3. Select the template and then click **Modify**.
4. To define the text template properties, in the**Text Annotation** dialog box, perform the following steps:
   1. In the left pane, select **Properties**.
   2. Optional. Supply a description for the annotation template.
   3. Under **Options**, verify that **Is Active** is selected so that it appears on the **Annotations** toolbar.
5. To add content to the text template, in the **Text Annotation** dialog box, perform the following steps.
   1. In the left pane, select **Content**.
   2. Optional. In **Enter text**, type the text you want in the field.
   3. To insert a time or user code in the text, click the insertion point in the field and click **Insert**.
   4. In the **Insert Date/Time/User Code** dialog box, select a code to add and then click **Insert**.
6. To change the appearance of the text template, in the **Text Annotation** dialog box, perform the following steps.
   1. If you selected text content, in the left pane, select **Appearance**.
   2. In **Face**, select a typeface.
   3. In **Style**, select **B** for bold, **I** for italic, **U** for underline, or **S** for strikeout text.
   4. In **Size**, choose the font size.
   5. In **Alignment**, select the type of alignment you need for the text.
   6. In **Color**, select the text color.

   > **Note:** When you select **Automatic Color** when modifying an annotation instance or creating an annotation template, the system applies black to the color property being modified.

7. To add security to the text template, in the left pane, select **Security**.
8. Under **Users and Groups**, click **Add**.
9. In the **Select Users and Groups** dialog box, perform the following steps.
   1. To add a user, on the **Users** tab, search for and select a user and click **Add**.
   2. To add a group, on the **Groups** tab, search for and select a group and click **Add**.

3. Add as many users or groups as necessary.
4. Click **OK**.

10. In the **Text Annotation** dialog box, under **Users and Groups**, select the user or group you want to assign privileges to and grant or deny the necessary privileges.
11. Click **OK**.

Create a URL annotation template

To create a URL annotation template, complete the following steps.

1. In **Management Console**, in the left pane, under **Select Department**, select a department from the list.
2. In the left pane, click **Annotations**.
3. In the right pane, perform the following steps.
   1. In the **Select an Annotation type** box, select **URL** and then click **New**.
   2. In the selected row under **Name**, type a name for the template and then press `ENTER`.
   3. Select the template and then click **Modify**.
4. In the **URL Annotation** dialog box, to define the URL template properties, perform the following steps.
   1. In the left pane, select **Properties**.
   2. Optional. Supply a description for the annotation template.
   3. Under **Options**, verify that **Is Active** is selected so that it appears on the **Annotations** toolbar.
5. To add content to the URL template, in the **URL Annotation** dialog box, perform the following steps.
   1. In the left pane, select **Content**.
   2. Optional. In **Address**, type the web address of the URL to open when a user selects the URL.
   3. Optional. In **Text to Display**, type the text you want to appear on the item to identify the URL.

      If you leave any of these fields blank, Perceptive Content prompts for the missing information when the user adds the annotation.
6. To change the appearance of the URL template, in the **URL Annotation** dialog box, perform the following steps.
   1. If you selected text content, in the left pane, select **Appearance**.
   2. In **Face**, select a typeface.
   3. In **Size**, choose the font size.
   4. In **Color**, select the text color.
7. To add security to the text template, in the **URL Annotation** dialog box, in the left pane, select **Security**.
8. Under **Users and Groups**, click **Add**.
9. In the **Select Users and Groups** dialog box, perform the following steps.
   1. To add a user, on the **Users** tab, search for and select a user and click **Add**.
   2. To add a group, on the **Groups** tab, search for and select a group and click **Add**.
   3. Add as many users or groups as necessary.
   4. Click **OK**.

10. In the **URL Annotation** dialog box, under **Users and Groups**, select the user or group you want to assign privileges to and grant or deny the necessary privileges.
11. Click **OK**.

Modify annotation templates

Hide an annotation type

When you make all annotation templates of a specific type such as check, stamp, or line inactive, that annotation type no longer appears on the toolbar in the viewer. If you later create new templates of the type that was hidden, the type is restored on the toolbar. To hide an annotation type, complete the following steps.

1. In **Management Console**, in the left pane, under **Select Department**, select a department from the list.
2. In the left pane, click **Annotations**.
3. In the right pane, in the **Select an Annotation type** box, select the annotation type you want to hide.
4. Under **Templates**, select the annotation template and then click **Modify**.
5. In the **<Annotation Type> Annotation** dialog box, in the left pane, select **Properties**.
6. In the right pane, under **Options**, clear the **Is Active** check box and then click **OK**.
7. Repeat the previous steps for all the annotation templates of the type you want to hide.

Delete an annotation template

You can remove an annotation template only if an annotation of that type does not exist. If an annotation of that type does exist, you cannot remove the annotation template but you can mark it as not active. To delete an annotation template, complete the following steps.

1. In **Management Console**, in the left pane, under **Select Department**, select a department from the list.
2. In the left pane, click **Annotations**.
3. In the right pane, in **Select an Annotation type** box, select the appropriate type for the annotation you want to remove.
4. Under **Templates**, select an annotation template and then click **Delete**.
5. Click **Yes**.

Disable an annotation template

When you make an annotation template inactive, it no longer appears as a selection for that annotation type such as check, stamp, or line in the viewer. To inactivate an annotation template, complete the following steps.

1. In **Management Console**, in the left pane, under **Select Department**, select a department from the list.
2. In the left pane, click **Annotations**.
3. In the right pane, in the **Select an Annotation type** box, select the appropriate type for the annotation template you want to make inactive.

4. Under **Templates**, select the annotation you want to make inactive and then click **Modify**.
5. In the **<Annotation Type> Annotation** dialog box, in the left pane, select **Properties**.
6. In the right pane, under **Options**, clear the **Is Active** check box.
7. Click **OK**.

Modify an annotation template

To modify an annotation template, complete the following steps.

1. In **Management Console**, in the left pane, under **Select Department**, select a department from the list.
2. In the left pane, click **Annotations**.
3. In the right pane, perform the following steps.
   1. In the **Select an Annotation Type** box, select the annotation type you want to modify.
   2. Under **Templates**, select the template and then click **Modify**.
4. To modify the template properties, in the **<Annotation Type> Annotation** dialog box, in the right pane, under **General**, perform the following steps.
   1. In the left pane, select **Properties** and modify the annotation template properties.
   2. Modify the name and description as needed.
5. To modify the template appearance, in the **<Annotation Type> Annotation** dialog box, in the right pane, under General, perform the following steps.
   1. In the left pane, select **Appearance** and modify the annotation template appearance properties.

   > **Note:** When you select **Automatic Color** when modifying an annotation template, the system applies black to the color property being modified.

6. In the right pane, under **Options**, perform one of the following actions:
   - To make the template available through the **Annotations** toolbar, select the **Is Active** check box.
   - To make the template inactive and remove it from the **Annotations** toolbar, clear the **Is Active** check box.
7. If **Content** appears in the left pane, select **Content** and modify the content as needed.
8. Click **OK**.

Show inactive annotation templates

***To show inactive annotation templates, complete the following steps.

1. In **Management Console**, in the left pane, under **Select Department**, select a department from the list.
2. In the left pane, click **Annotations**.
3. In the right pane, select the **Show Inactive Templates** check box.

   All inactive templates appear.
4. Modify the inactive templates as needed.

Manage views

About administering views

As a department manager, you create views that display only the content with which your users need to work.

By tailoring your user's view to only the items they need to see, you simplify their user experience. While the system may contain hundreds or thousands of items and other types of content, your users see only the subset of items that you enable in their view. Views enable you to add another layer of protection to content. In addition to the access privileges set for drawers, file plans, and item types, your users can see the item within a particular drawer, file plan, or type that satisfies the view definition.

You can also use a view to create a report if you have Business Insight installed in your environment.

To view records functionality, you must install a Records Manager license.

About administering related views

A user can display one or more related views from a viewer in Perceptive Content. When the user selects a related view to apply to the active document or folder, the Related Documents or Related Folders pane displays other items that match the items with respect to the conditions you define for the related view.

Users with document or folder view management privileges can create, rename, and delete related views in Perceptive Content. When you modify a related view, you automatically enter Perceptive Content View Designer, where you can create or modify relationship conditions, activate the view, and assign security settings to it.

Suppose, for example, you view a student information document with a Field2 value that contains the student's ID number. You want to see all the other documents with the same Field2 value. You can create the condition for this relationship, and the Related Documents pane displays any other documents that have a Field2 value that match the student ID number in the active document.

As another example, suppose you view an inventory document with a custom property that contains a check number. Another set of business documents contains a check number in Field3 rather than in a custom property. You want to see all documents with a Field3 value that matches the Check Number custom property in the active document. You can create the conditions for this relationship, and the Related Documents pane displays any other documents that have a Field3 value that matches the Check Number custom property in the active document.

For folders, related views are like related views for documents except that the relationship matches on folder properties. For example, suppose you work at a hospital and your Perceptive Content environment is set up so that each time a patient visits the hospital, a new folder is created. The new folder contains all documents related to that visit. If a patient makes a return visit, that patient will have two folders created, one for each visit. You view a recent patient's visit and realize you need to see all other folders from past visits. You can create the conditions for this relationship, view all folders that correspond to the patient's identification code, and open any folders that you need to view.

Types of views

The following list summarizes views available in Perceptive Content, including views created by you, your view manager, and views created automatically by the Perceptive Content system.

Application Plan

An application plan view returns a set of documents captured using a specific application plan. Application plans that do not have a defined view action do not display results.

Modifiable components

View conditions

Column layout

View statistics

Sorting and grouping

Security considerations

Users with application plan management privileges can modify application plan views, including view actions and components, in Application Plan Designer.

Users with the View privilege for the application plan can run the view. For the active business application plan screen, the view returns the associated results.

Batches

A batch view returns the batches in your Perceptive Content system. By default, batch users can see all batches, batches that are ready for QA, and batches that are ready for linking.

Modifiable components

Column layout

Sorting and grouping

Document

A document view returns a set of documents. Document views appear in the Views pane under Documents.

Modifiable conditions

View name

View privileges

View conditions

Public filters

Private filters

Column layout

View statistics

Sorting and grouping

Security considerations

Users with view access can run a document view.

File Plans

A file plan view returns a set of records within a particular record category or record folder. File plan views appear in the Views pane under File Plans, and are organized according to the hierarchy of file plans, record categories, and record folders in the system. When you select one of these items, Perceptive Content retrieves the set of records within that item.

ImageNowExplorer uses the system-defined view and it cannot be modified. You can modify a view during a viewing session, but you can t create and save filters or views for file plan view.

File plan view does not use Quick Search, only Advanced Search.

Modifiable components

View conditions

Column layout

Sorting and grouping

Security considerations

In the views tree, users see only the file plans for which they have been granted Search privileges, and the record categories and record folders for which they have been granted Use privileges.

Folder

A folder view returns a set of folders. Folder views appear in the Views pane under Folders.

Modifiable conditions

View name

View privileges

View conditions

Public filters

Private filters

Column layout

View statistics

Sorting and grouping

Security considerations

Users with view access can run a folder view.

Folder content

When the user opens a folder, Folder Viewer displays a secondary grid that lists the folder's contents. This secondary grid is called a folder content view. Because document and folder shortcuts can belong to any number of folders, the same document or folder might appear as a representation in Folder Viewer with different grid layouts, depending on the type of folder the user opens.

Changes you make apply to all folders associated with the modified folder type. Because you can represent a document or folder using shortcuts in any number of folders, the same item might appear in a folder content view with different grid layouts, depending on the folder's type.

Modifiable conditions

Column layout

View statistics

Sorting and grouping

Security considerations

Users with folder type management privileges can modify components of the folder content view in Management Console.

Recently received documents

Recently received documents appear in a temporary view that appears when one Perceptive Content user transfers documents to another user with the Send to User feature. This transfer must occur while both users are connected to the same ImageNow Server. The view sorts the received documents according to the name of the sending user and the time they were sent.

Record

To view records functionality, you must install a Records Manager license.

A record view returns a set of records. Record views appear in ImageNowExplorer, in the Views pane under Records.

Modifiable conditions

View name

View privileges

View conditions

- Public filters
- Private filters
- Column layout
- View statistics
- Sorting and grouping

Security considerations

Users with view access can run a record view.

Record Folder

A record folder view returns a set of record folders and record categories. Record Folders views appear in ImageNowExplorer, in the Views pane under Record Folders.

Modifiable conditions

- View name
- View privileges
- View conditions
- Public filters
- Private filters
- Column layout
- View statistics
- Sorting and grouping

Security considerations

Users with view access can run a record folder view.

Record Folder Content

When the user opens a record folder, Record Folder Viewer displays a secondary grid that lists the folder s contents. This secondary grid is called a record folder content view. Because record folder shortcuts can belong to any number of record folders, the same record folder might appear as a representation in Record Folder Viewer with different grid layouts, depending on the type of record folder the user opens. Changes you make apply to all record folders associated with the modified record folder type.

Modifiable conditions

- Column layout
- View statistics

Sorting and grouping

Security considerations

Users with record folder management privileges can modify components of the record folder content view in Management Console.

Recycled documents and document folders

When the user deletes a document or folder, Perceptive Content moves the item to a system view called My Recycled Documents or My Recycled Folders.

Items remain in the recycled view for the number of days that you specify in the *inserverFS.ini* file.

Modifiable conditions

Private filters

Security considerations

If the user is a Department Manager, two additional views appear. These views, All Recycled Documents and All Recycled Folders, display all items deleted by all users. As long as the user can see a recycled document or folder, the user can restore it to its previous state, at which time the document or folder keeps the attributes it had before deletion, if possible.

Related

Related views appear in the Related Documents pane of the document viewer and in the Related Folders pane of the folder viewer. A related view applies the relationship selected in the list to the current document or folder. The view displays a list of all documents or folders that satisfy the conditions of the relationship.

Modifiable conditions

Relationship name

View privileges

View conditions

Public filters

Private filters

Column layout

View statistics

Sorting and grouping

Security considerations

Users with document view management privileges can create and modify document relationships in Management Console. Users with folder view management privileges can create and modify folder relationships in Management Console.

Task

A task view returns a list of tasks assigned to the user according to the type of task, such as My Assigned or To Review. Task views appear in the Views pane under Tasks.

Modifiable conditions

Public filters

Private filters

View statistics

Column layout

Sorting and grouping

Workflow process

A workflow process view returns a list of items (representing documents or folders) when the user accesses a workflow process, which appears in the Views pane under Workflow.

Modifiable conditions

Private filters

Security considerations

Workflow process views appear automatically depending on the workflow queues for which a user has the necessary privileges. Users with workflow process management privileges can modify workflow queue view components in Workflow Designer.

Security considerations

Users with view access can run a folder view.

Workflow queue

A workflow queue view returns a list of items (representing documents or folders) when the user accesses a workflow queue, which appears in the Views pane under Workflow.

Modifiable conditions

Column layout

View statistics

Private filters

Grouping and sorting

Security considerations

Workflow queue views appear automatically depending on the workflow queues for which a user has the necessary privileges. Users with workflow process management privileges can modify workflow queue view components in Workflow Designer.

Supported file formats for Perceptive Content

The following tables list the file formats that ImageNowViewer support.

Archive file formats

Format	Version	Extension
7-Zip	4.57	7Z
BinHex	N/A	HQX
GZIP	2	GZ
Java Archive	N/A	JAR
Microsoft Cabinet Format	1.3	CAB
Microsoft Compressed Folder	N/A	LZH, LHA
PKZIP	Through 9.0	ZIP
RAR Archive	2.0 through 3.5	RAR
Tape Archive	N/A	TAR
Unix Compress	N/A	Z
UUEncoding	All versions	UUE
WinZip	Through 10	ZIP

Binary file formats

Format	Version	Extension
Executable	N/A	EXE

Format	Version	Extension
Link Library	N/A	DLL

Database file formats

Format	Version	Extension
Microsoft Access	95, 97, 2000, 2002, 2003	MDB

Display file formats

Format	Version	Extension
Adobe PDF	Through 9	PDF

Graphic file formats

Format	Version	Extension
Computer Graphics Metafile	N/A	CGM
CorelDRAW	Through 9.0	CDR
DCX Fax System	N/A	DCX
Digital Imaging and Communications in Medicine	N/A	DCM
Encapsulated PostScript (raster)	TIFF header	EPS
Enhanced Metafile	N/A	EMF
GIF	87, 89	GIF
JPEG	N/A	JPEG, JPG
Lotus AMIDraw Graphics	N/A	SDW

Format	Version	Extension
Lotus Pic	N/A	PIC
Macintosh Raster	2	PIC, PCT
MacPaint	N/A	PNTG
Microsoft Office Drawing	N/A	MSO
PC PaintBrush	3	PCX
Portable Network Graphics	N/A	PNG
Sun Raster Image	N/A	RS
Tagged Image File	Through 6.0.3	TIFF
Truevision Targa	2	TGA
Windows Animated Cursor	N/A	ANI
Windows Bitmap	N/A	BMP
Windows Icon Cursor	N/A	ICO
Windows Metafile	3	WMF
WordPerfect Graphics 1	1	WPG
WordPerfect Graphics 2	2, 7	WPG

Mail file formats

Format	Version	Extension
Lotus Notes database	4, 5, 6.0, 6.5	NSF
Microsoft Outlook	97, 2000, 2002, 2003	MSG
Microsoft Outlook Personal Folder	97, 2000, 2002, 2003	PST

Multimedia file formats

Any audio or movie format supported by Apple QuickTime or Windows Media Player. For specific formats supported by these players, refer to the respective Apple or Microsoft websites. Depending on your hardware and network, large movie files (over 100 MB) may slow performance.

Presentation file formats

Format	Version	Extension
Applix Presents	4.0, 4.2, 4.3, 4.4	AG
Corel Presentations	6, 7, 8, 9, 10, 11, 12, X3	SHW
Lotus Freelance Graphics 2	2	PRE
Lotus Freelance Graphics	96, 97, 98, R9, 9.8	PRZ
Microsoft PowerPoint Macintosh	98, 2001, 2004	PPT, PPS, POT
Microsoft PowerPoint PC	4	PPT, PPS, POT, PPTX, PPTM, POTX, POTM, PPSX, PPSM
Microsoft PowerPoint Windows	95, 97, 2000, 2002, 2003, 2007	PPT, PPTM, PPTX

Spreadsheet file formats

Format	Version	Extension
Applix Spreadsheets	4.2, 4.3, 4.4	AS
Comma Separated Values	N/A	CSV
Corel Quattro Pro	5, 6, 7, 8	WB2, WB3
Lotus 1-2-3	96, 97, R9, 9.8	123
Lotus 1-2-3	2, 3, 4, 5	WK4
Lotus 1-2-3 Charts	2, 3, 4, 5	123
Microsoft Excel Charts	2, 3, 4, 5, 6, 7	XLS

Format	Version	Extension
Microsoft Excel Windows	2.2 through 2007	XLS, XLSM, XLSX, XLW, XLT, XLA, XLTX, XLTM, XLAM
Microsoft Excel Macintosh	98, 2001, v.X, 2004	XLS
Microsoft Works Spreadsheet	1, 2, 3, 4	S30, S40
OASIS Open Document Format	1, 2	ODS, SXC, STC
OpenOffice Calc	1, 1.1	SXC, ODS, OTS
StarOffice Calc	6, 7	SXC, ODS

Text and Markup file formats

Format	Version	Extension
ANSI	N/A	TXT
ASCII	N/A	TXT
HTML	3, 4	HTM
Microsoft Excel Windows XML	2003	XML
Microsoft Word Windows XML	2003	XML
Rich Text Format	1 through 1.7	RTF
Unicode Text **Note:** Specific support is only applicable to the Unicode version.	3, 4	TXT
UTF-8	N/A	TXT
UTF-8 - No Byte Order Mark (BOM)	N/A	TXT

Format	Version	Extension
UTF-16 Little Endian (UTF-16LE) **Note:** A BOM is required for the UTF-16LE format to be read correctly.	N/A	TXT
XHTML	1	HTM, XHTML
XML	1.0	XML

Word processing file formats

Format	Version	Extension
Adobe FrameMaker Interchange Format	5, 5.5, 6, 7	MIF
Applix Words	3.11, 4, 4.1, 4.2, 4.3, 4.4	AW
Corel WordPerfect Linux	6.0, 8.1	WPS
Corel WordPerfect Macintosh	1.02, 2, 2.1, 2.2, 3, 3.1	WPS
Corel WordPerfect Windows	5, 5.1	WO, WPS
Corel WordPerfect Windows	6, 7, 8, 9, 10, 11, 12, X3	WPD
DisplayWrite	4	IP
Folio Flat File	3.1	FFF
Fujitsu Oasys	7	OA2
IBM DCA/RFT (Revisable Form Text)	SC23-0758 -1	DC
JustSystems Ichitaro	8 through 2005	JTD
Lotus AMI Pro	2, 3	SAM

Format	Version	Extension
Lotus AMI Professional Write Plus	2.1	AMI
Lotus Word Pro	96, 97, R9	LWP
Lotus SmartMaster	96, 97	MWP
Microsoft Word PC	4, 5, 5.5, 6	DOC
Microsoft Word Windows	1.0, 2.0, 6, 7, 8, 95, 97, 2000, 2002, 2003, 2007	DOC, DOCX, DOCM, DOT, DOTX, DOTM
Microsoft Word Macintosh	4, 5, 6, 98, 2001, v.X, 2004	DOC, DOT
Microsoft Works	1, 2, 3, 4, 6, 2000	WPS
Microsoft Windows Write	1, 2, 3	WRI
OASIS Open Document Format	1, 2	ODT, SXW, STW
Wordpad	Through 2003	RTF
XyWrite	4.12	XY4

Work with Views

Create a view

To create a new view, complete the following steps.

1. In **Management Console**, in the left pane, click **Views**.
2. In the right pane, click the appropriate tab, and then click **New**.
3. In the **New View** dialog box, define a name and description for this view and click **OK**.

Next Modify the view in View DesignerManagement Console to define conditions, column layout, filters, and view security.

Create a related view

To create a relationship view for an item, perform the following steps.

1. In **Management Console**, in the left pane, click **Relationships**.
2. In the right pane, on the **Related** tab, click **New**.

3. In the **New Relationship** dialog box, type a name and an optional description of the view that appears in the Tool Tip for the view, and then click **OK**.

Next Modify the view in View Designer to define conditions, column layout, filters, and view security.

Copy a view

You can copy a view to create a new view with the same conditions, filters, column layout, and security settings. To copy a view, perform the following steps.

You cannot copy a task view.

1. In **Management Console**, in the left pane, click **Views**.
2. On the appropriate tab, select the view definition and click **Copy**.

   To view records functionality, you must install a Records Manager license.
3. In the **Copy View** dialog box, type a name and optional description for the new view.
4. Optional. To copy public filters associated with the original view definition, select the **All public filters** check box.
5. Optional. To copy users and the view privileges associated with the original view definition, select the **All users and their privileges** check box.
6. Optional. If you included users and you also want to copy any private filters created by those users, select the **Private filter for users** check box.
7. Click **OK**.

Next Modify the view in View Designer to define conditions, column layout, filters, and view security.

Copy a related view

To copy a relationship view for an item, complete the following steps.

1. In **Management Console**, in the left pane, click **Relationships**.
2. In the right pane, click the **Related** tab.
3. Select the relationship and click **Copy**.

Next Modify the view in View Designer to define conditions, column layout, filters, and view security.

Delete a view

To delete a view, perform the following steps.

1. In **Management Console**, in the left pane, click **Views**.
2. On the **Document**, **Folder**, **Record**, or **Record Folder** tab, select the view and click **Delete**.

   To view records functionality, you must install a Records Manager license.
3. In the confirmation dialog, click **Yes**.

Result Users will not see the view removed until they log out and log in again.

Delete a related view

To delete a relationship view for a document, complete the following steps.

1. In **Management Console**, in the left pane, click **Relationships**.
2. In the right pane, click the **Related** tab.
3. Select the relationship and click **Delete**.
4. In the confirmation dialog box, click **Yes**.

Rename a view

To rename a view, complete the following steps.

You can also rename a view by editing its properties in View Designer. You cannot rename a task view.

1. In **Management Console**, in the left pane, click **Views**.
2. In the right pane, on the appropriate tab, select the view you want to rename and click **Rename**.
3. In the **Rename View** dialog box, type the new view name and an optional description.
4. Click **OK**.

Rename a related view

To rename a relationship view for documents or folders, complete the following steps.

1. In **Management Console**, in the left pane, click **Relationships**.
2. In the right pane, click the **Related Documents** or **Related Folders** tab.
3. Select the relationship and click **Rename**.
4. In the **Rename Relationship** dialog box, type the new name of the relationship in the **Name** box.

Modify a view

To modify components of a view, complete the following steps.

Prerequisite It is recommended that you perform view modifications when no users are signed in to Perceptive Content.

1. In **Management Console**, in the left pane, click **Views**.
2. In the right pane, on the appropriate tab, select the view you want to change and click **Modify**.

Next Modify the view in View Designer to define conditions, column layout, filters, and view security.

Modify a related view

To modify a relationship view for an item, complete the following steps.

Prerequisite It is recommended that you perform view modifications when no users are signed in to Perceptive Content.

1. In **Management Console**, in the left pane, click **Relationships**.
2. In the right pane, click the **Related** tab.

3. Select the relationship and click **Modify**.

Next Modify the view in View Designer to define conditions, column layout, filters, and view security.

Version control status indicators

Any document added to version control, either in its current version or in a previous version, is accompanied by a status indicator in the document search results grid, in the Version Controlled column. If your view does not show this column, you can temporarily display it or you can add the column in a private filter.

None

The document is not version controlled.

Checked In

The document is version controlled but not currently checked out to any users.

Checked Out

This document is version controlled and currently checked out by another user.

Checked Out by You

This document is version controlled and currently checked out by you.

If a document is checked in, but marked private by another user, the Is Private icon  appears in the Is Private column in the document search results grid.

Configure recycle bin views

You can determine the amount of time an item appears in the recycle bin views in ImageNowExplorer before permanently deleting it. To configure recycle bin views, complete the following steps.

The following recycle bin views are available to configure: My Recycled Documents, My Recycled Folders, All Recycled Documents, and All Recycled Folders.

1. Open the *[drive:]**inserver\etc**\inserverFS.ini* file with a text editor.
2. To determine the number of days you want items to remain in the recycled views before they are permanently removed from **ImageNow Server**, under **[General]**, perform one of the following actions for the *destruction.wait.time* setting.
   - To immediately delete items from the recycle bin, enter `0`.
   - To delete items from the recycle bin after a specific number of days, enter the number of days.

> **Note:** You cannot enter a negative integer. The maximum number of days you can retain items in a recycle bin view is 2,147,483,647.

3. Save and close the *inserverFS.ini* file.
4. Restart the **File System Agent** service.

Set the system default view

You can set the system-wide default view to use a link that does not specify which view to use, and the user does not have a default view configured. To set the system default view, complete the following steps. You must be a department manager to set the default system view.

You can also set the default view on a per-user basis in Management Console.

1. In **Management Console**, in the left pane, under **Select Department**, select a department from the list.
2. In the left pane, select **Views**.
3. In the right pane, select the **System Defaults** tab.
4. In the **Document view** list, select a default document view.
5. In the confirmation prompt, click **Yes**.

> **Note:** Select **None** from the list to remove the default document view.

6. In the **Folder view** list, select a default folder view.
7. In the confirmation prompt, click **Yes**.

> **Note:** Select **None** from the list to remove the default folder view.

Folder content search conditions

When you display the Search pane on the Content tab of Folder Viewer, several conditions are available. The Add Condition dialog box allows you to build a search using a combination of constraints, fields, operators, and values described in the following table.

If you are performing a variable search, you can select one of the following values to use as a variable for the current user: user name, first name, last name, title, organization, organization unit, locality, or user ID. You can also use the current date and time as a variable.

Composite property

The Composite property constraint allows the following operators: is equal to, is not equal to, is less than, is greater than, is less than or equal to, is greater than or equal to, starts with, does not start with, ends with, does not end with, contains, does not contain, is blank, is not blank is one of, is not one of, is between, and is not between.

The composite properties, which can contain all possible values, are defined by your administrator.

You can select a composite property is the Composite list, or you can select a custom property in the Field list.

Custom property

The Custom property constraint allows the following operators: is equal to, is not equal to, is less than, is greater than or equal to, starts with, does not start with, ends with, does not end with, contains, does not contain, is blank, is not blank, is one of, is not one of, is between, is not between, is equal to, is not equal to

Constraint	Operators	Field	Field Description	Possible Values
Composite property	is equal to, is not equal to, is less than, is greater than, is less than or equal to, is greater than or equal to, starts with, does not start with, ends with, does not end with, contains, does not contain, is blank, is not blank, is one of, is not one of, is between, is not between	In the Composite list, select a composite property. In the Field list, select a custom property.	Composite properties are defined by your administrator.	All defined composite properties
Content property	is equal to, is not equal to, is less than, is greater than, is less than or equal to, is greater than or equal to, starts with, does not start with, ends with, does not end with, contains, does not contain, is blank, is not blank, is one of, is not one of, is between, is not	Content type	The type of content in the folder.	• Document • Document Shortcut Folder • Folder Shortcut

Constraint	Operators	Field	Field Description	Possible Values
	between			
Added to folder within (days)	The number of days within which the document, folder, or shortcut was added or moved to the folder.	Type any positive integer.		
Created within (days)	The number of days within which the document, folder, shortcut was created.	Type any positive integer.		
Name	The name value of the document, folder, or shortcut.	Type any alphanumeric value.		
Drawer	The drawer value associated with the document, folder, or item referenced by a shortcut.	Type any alphanumeric value.		
Document ID	The unique ID of the document.	Type any alphanumeric value.		
Field1	The Field1 value associated with the document or document referenced by a shortcut.	Type any alphanumeric value.		
Field2	The Field2 value associated with the document or document referenced by a	Type any alphanumeric value.		

Constraint	Operators	Field	Field Description	Possible Values
	shortcut.			
Field3	The Field3 value associated with the document or document referenced by a shortcut.	Type any alphanumeric value.		
Field4	The Field4 associated with the document or document referenced by a shortcut.	Type any alphanumeric value.		
Field5	The Field5 associated with the document or document referenced by a shortcut.	Type any alphanumeric value.		
Document type	The document type associated with the document or document referenced by a shortcut.	Type any alphanumeric value.		
Folder ID	The unique ID of the folder.	Type any alphanumeric value.		
Folder type	The folder type associated with the folder or folder referenced by a shortcut.	Type any alphanumeric value.		
Custom property	is equal to, is not equal to, is less	Select a custom property.	Custom properties are defined by your administrator.	All defined custom properties

Constraint	Operators	Field	Field Description	Possible Values
	than, is greater than, is less than or equal to, is greater than or equal to, starts with, does not start with, ends with, does not end with, contains, does not contain, is blank, is not blank, is one of, is not one of, is between, is not between			
Date	is equal to, is not equal to, is less than, is greater than, is less than or equal to, is greater than or equal to, is one of, is not one of, is between, is not between	Added to folder	The date the content was added or moved to the folder.	Type or select a date value.
Checked out	The date the document or document referenced by a shortcut was checked out in version control.	Type or select a date value.		
Created	The date the document, folder, or shortcut was created.	Type or select a date value.		
Last viewed	The date the content was last viewed by a user.	Type or select a date value.		

Constraint	Operators	Field	Field Description	Possible Values
Modified	The date the document, folder, or shortcut was last modified.	Type or select a date value.		
Status changed	The date the folder's active or inactive status changed.	Type or select a date value.		
Document Status	is equal to, is not equal to	Digital signature status	The status of the version controlled digital signature of the document.	Valid, Invalid, Void, Not Signed
Has hold applied	Whether the document has a direct or inherited retention hold applied.	Yes, No		
Has physical reference	Whether the document had a physical file reference.	Yes, No		
Is private	Whether the document is marked private in version control.	Yes, No		
Is version controlled	Whether the document is added to version control.	Yes, No		
Folder Status	is equal to, is not equal to	Folder status	The active or inactive status of the folder.	Active, Inactive
Has required documents	Whether the folder has required document types.	Yes, No		

Constraint	Operators	Field	Field Description	Possible Values
Physical property	is equal to is not equal to, is less than, is greater than, is less than or equal to, is greater than or equal to, starts with, does not start with, ends with, does not end with, contains, does not contain, is blank, is not blank, is one of, is not one of, is between, is not between	In the Template list, select a physical file template. In the Field list, select a physical property.	Physical file templates and physical properties are defined by your administrator.	Template: All physical file templates the user can access, Field: All physical properties associated with the template
User	is equal to, is not equal to, starts with, does not start with, ends with, is blank, is not blank, is one of, is not one of	Checked out by	The user who has the document checked out in version control.	Type an alphanumeric value. Any valid user name.
Created by	The user who created the document, folder, or shortcut.			
Last viewed by	The user who last viewed the document, folder, or item referenced by a shortcut.			
Modified by	The user who last modified the document, folder, or shortcut.			
Private by	The user who			

Constraint	Operators	Field	Field Description	Possible Values
	marked the document private in version control.			
Status changed by	The user who last changed the folder status.			
Workflow item property	is equal to, is not equal to, is less than, is greater than, is less than or equal to, is greater than or equal to, starts with, does not start with, ends with, does not end with, contains, does not contain, is blank, is not blank, is one of, is not one of, is between, is not between	Is in workflow	Whether the document or folder is added to workflow.	Yes, No
Workflow queue	The workflow queue associated with the document, folder, or item referenced by a shortcut.	Type an alphanumeric value.		
Workflow item user	The user who added the document, folder, or item referenced by a shortcut to workflow.	Type an alphanumeric value. Any valid user name.		
Workflow item status	The status of the document, folder, or item referenced by a shortcut in workflow.	Idle, Working, On hold, Pending, Waiting for routing, Waiting for inbound action		

Sort view or search results

You can sort the rows in the results grid for a view or public filter. To sort view results, complete the following steps.

1. In the view preview or search results grid, to sort by a single column, right-click the column heading and then do one of the following:
   - To sort the results in ascending order, select **Sort Ascending**.
   - To sort the results in descending order, select **Sort Descending**.
2. To sort by additional columns, hold the `SHIFT` key and click the column heading once to sort the results in ascending order or twice to sort the results in descending order.

   Note: To sort on multiple columns, you must group the results.
3. Optional. To remove all sorting, right-click a column heading and select **Reset sort order**.
4. Save the view or filter to preserve the sort order.

Select columns to display

To show or hide columns in a view or public filter, complete the following steps.

1. In **View Designer**, in the **Preview** pane, click the **Columns** button.
2. In the **Columns** dialog box, do the following substeps:
   1. For the column or columns you want to hide, clear the check box. To hide all columns, right-click anywhere in the dialog box and then click **Clear All**.
   2. For the column or columns you want to show, select the check box. To show all columns, right-click anywhere inside the dialog box and then click **Select All**.
   3. Click **OK**.
3. In the **Designer** toolbar, click the **Save** button.

Group view or search results

You can group the results of a view, filter, or search by one or more columns into groups you can expand and collapse. To group view results, complete the following steps.

1. In the search results grid or view preview grid, right-click a column heading, and then click **Group by this Column**.

   Groups are initially collapsed when the view or filter runs.
2. Optional. To create a subgroup under the grouped column, right-click a column heading, and then click **Group by this Column**.
3. Optional. To expand the grouped results, right-click a column headings, and then click **Expand All Groups**.
4. Save the view or filter to preserve the column grouping.

About viewing batches by batch user

A user can view batches captured by batch users, and can be limited to viewing batches captured only by specific batch users.

Users can capture batches with the **Global > Capture > Batch Mode** privilege and then view those batches.

If you want a user to view batches captured by any other batch users, you must give the user the **Drawer > Batch (Proposed Key) > Process** privilege for each drawer.

If you want to limit a user to viewing batches captured only by specific batch users, you must also enable filtering by batch user. When you enable filtering by batch user, you create a list of only those batch users whose batches you want the user to view.

Add a custom property column

To add columns to display custom property values for content, complete the following steps.

1. Access the view using one of the following methods:

Situation	Steps
Add a custom property column for a workflow queue view	1. Open the workflow process in **Workflow Designer**. 2. In **Workflow Designer**, open the desired queue. 3. In the **Queue Properties** dialog box, click **Appearance**. 4. In the right pane, click **Preview**.
Add a custom property column for a view	1. Open the view in **View Designer**. 2. In **View Designer**, click **View > Preview**.
Add a custom property column for a folder content view	1. In **Management Console**, in the left pane, click **Folder Types**. 2. In the right pane, on the **Folder Types** tab, select the folder type and click **Modify**. 3. In the **Folder Type** dialog box, on the **Appearance** tab, click **Preview**.

2. In the **View Preview** window, click the **Columns** button.
3. In the **Columns** dialog box, click **Add**.
4. In the **Custom Property** dialog box, select the **Filter by** list and do one of the following actions:
   - To display a custom property based on item type, select **Document Types**.

- To display a custom property based on folder type, select **Folder Types**.
- To display all custom properties, select **All Custom Properties**.

5. In the **Type** list, select a custom property.

   The **Type** list options change based on the **Filter by** option selected.
6. Select a custom property and click **Add**.
7. Click **OK**.

Enable filtering by batch user for a group

A group can view batches captured by batch users if granted the appropriate drawer privileges for the drawers for which the batches are targeted. To further limit groups to viewing only batches captured by specific batch users, complete the following steps.

1. In **Management Console**, in the left pane, under **Select Department**, select **Cross Department Settings** from the list.
2. In the left pane, click **Groups.**
3. In the right pane, select the group you want and click **Modify**.
4. In the **Modify Group Profile** dialog box, in the left pane, click **Batch Users**.
5. Select **Enable filtering by batch user**.
6. To add batch users to the list, complete the following substeps.
   1. Click **Add**.
   2. In the **Select Users** dialog box, under **Available Users**, select a user and click **Add**.
   3. Click **OK** when you finish adding batch users.
7. Optional. To remove batch users from the list, complete the following substeps.
   1. Click the batch user.
   2. Click **Remove**.

Enable filtering by batch user for a user

A user can view batches captured by batch users if granted the appropriate drawer privileges for the drawers for which the batches are targeted. To further limit users to viewing only batches captured by specific batch users, complete the following steps.

1. In **Management Console**, in the left pane, under **Select Department**, select **Cross Department Settings** from the list.
2. In the left pane, click **Users.**
3. In the right pane, select the user you want and click **Modify**.
4. In the **Modify User Profile** dialog box, in the left pane, click **Batch Users**.
5. Select **Enable filtering by batch user**.
6. To add batch users to the list, complete the following substeps.
   1. Click **Add**.
   2. In the **Select Users** dialog box, under **Search**, select a user and click **Add**.

   3. Click **OK** when you finish adding batch users.
7. Optional. To remove batch users from the list, complete the following substeps.
   1. Click the batch user.
   2. Click **Remove**.

Add a custom property column for records

To add a custom property column for a record content view, complete the following steps.

1. In **Management Console**, in the left pane, click **Records** and select **Record Folder Types** or **Record Category Types**.
2. In the right pane, on the **Record Folder Types** or **Record Category Types** tab, select the folder type and click **Modify**.
3. In the dialog box, on the **Appearance** tab, click **Preview**.
4. In the **View Preview** window, click the **Columns** button.
5. In the **Columns** dialog box, click **Add**.
6. In the **Custom Property** dialog box, select the **Filter by** list and do one of the following actions:
   - To display a custom property based on record type, select **Record Types**.
   - To display a custom property based on record folder type, select **Record Folder Types**.
   - To display all custom properties, select **All Custom Properties**.
7. In the **Type** list, select a record or record folder type.

   The **Type** list options change based on the **Filter by** option selected.
8. Select a custom property and click **Add**.
9. Click **OK**.

Statistics

What are statistics?

Statistics are calculations such as the maximum, minimum, and average of all the values in a specific column that appear in the search results for the view.

You can define statistics for any document view, folder view, task view, record view, or record folder view for which you have management privileges. You cannot define statistics for a public filter or a related view.

For any folder type for which you have management privileges, you can create a view that determines the appearance of the folder content results in Folder Viewer. You can also create a statistic for a workflow view, which defines the appearance when viewing the contents of a workflow queue. When you define a set of statistics for a folder content or workflow view, the statistics appear in a pane below the search results grid. In the statistics pane, you can view the statistics, highlight the search results in the grid that apply to the statistic, and, if only one document or folder matches the statistic value, open the document or folder.

The following examples demonstrate some ways you can use view statistics.

Accounts Payable: Theresa is an Accounts Payable administrator who wants to quickly view the total of all the invoices in her "OpenInvoices" view. This view contains a custom property column which stores the invoice amount for each document. Because it is a numeric custom property, Theresa adds a Sum statistic on this custom property column named "Total open amount". Every time she runs a search using this view, she sees the total invoice amount of all the documents returned by the search in the statistics pane.

Admissions: Sam is an Admissions director who wants to view the average ACT score of the students who applied to his university in the current academic year. His student folder view contains a custom property column which stores the ACT score for each student and a date range that spans the current academic year. Because the view uses a numeric custom property, Sam adds an Average statistic on this custom property column named "Average ACT."

Healthcare: Dr. Lovelace wants to quickly view the next task he is responsible for in his folder view that lists all his patients with document deficiencies. His view administrator adds a Next statistic to the task due date column in the view. When Dr. Lovelace logs in, he can quickly see the date the next task is due, highlight the document associated with the task, and open it in ImageNowViewer.

To view records functionality, you must install a Records Manager license.

Data types for statistical functions

The statistical functions you can define depend on the data type of the column values. To add a statistic for a custom property column, you must first add the custom property column to the view. The following statistics are available for the specified data types.

Statistical functions

Average

This function calculates the average of the column values.

Column value data type

Numeric

Sample columns

Summary Task Count

<Number custom property>

Count

This function counts the number of values in the search results grid that match the selected variable (you must select a variable for this statistical function).

Column value data type

String, list, flag

Sample columns

Folder Name

In Workflow

<List custom property>

<String custom property>

<Flag custom property>

Count Future

This function counts the number of the column's date values that occur in the future.

Column value data type

Date

Sample columns

Next Task Due

Due Date

<Date custom property>

Count Past

This function counts the number of the column's date values that occur in the past.

Column value data type

Date

Sample columns

Created

Last Viewed

<Date custom property>

First

This function distinguishes the earliest date in the column's search results.

Column value data type

Date

Sample columns

Modified

Checked Out

<Date custom property>

Last

This function distinguishes the latest date in the column's search results.

Column value data type

Date

Sample columns

Checked In

Assigned

<Date custom property>

Maximum

This function distinguishes the largest numeric value in the column's search results.

Column value data type

Numeric

Sample columns

Pages

<Number custom property>

Median

The function distinguishes the middle value in the column's search results.

Column value data type

Sample columns

Current Version

<Number custom property>

Minimum

This function distinguishes the smallest numeric value in the column's search results.

Column value data type

Numeric

Sample columns

Days Until Due

<Number custom property>

Mode

This function distinguishes the most frequently occurring numeric value in the column's search results.

Column value data type

Numeric

Sample columns

Summary Task Count

<Number custom property>

Next

This function distinguishes the next sequential date value in the column's search results.

Column value data type

Date

Sample columns

Status Changed

<Date custom property>

Previous

This function distinguishes the previous sequential date value in the column's search results.

Column value data type

Date

Sample columns

Completed

<Date custom property>

Sum

This function calculates the total of the values in the column's search results.

Column value data type

Numeric

Sample columns

Pages

<Number custom property>

Add view statistics overview

The configuration of a view statistic differs based on the data value type you select. You can create statistics for document, folder, folder content, record, task, and workflow views. To create a statistic for a view, complete any of the following procedures.

- Add a statistic for a date value.
- Add a statistic for a flag value.
- Add a statistic for a list value.
- Add a statistic for a numeric value.
- Add a statistic for a string value.

Add a statistic for a date value

You can display the newest, oldest, or next date value in a list of search results, or display the total number of dates in the past or dates in the future. To add a statistic for a date value, complete the following steps.

Prerequisite Before you can add a statistic for a date custom property value, you must first add the custom property column to the view.

2. In the **Preview** pane, click the **Statistics** button.
3. In the **Statistics** dialog box, click **Add**.
4. Under **Label**, type a label that describes the statistical function to appear in the search results grid.

   Example If adding a statistic to view the next task due date, type `Next task due`.
5. Under **Column**, select the view column with the date values.
6. Under **Function**, select one of the following options depending on the display variable you want to show:

Situation	Steps
Total number of dates in the future	• Select **Count Future**.
Total number of dates in the past	• Select **Count past**.

Situation	Steps
Oldest date value	• Select **First**.
Newest date value	• Select **Last**.
The next future date	• Select **Next**.
The most recent date	• Select **Previous**.

7. Optional. Under **Caption**, select the value to display when the statistic only applies to one search result.

   Example If a **Previous** statistic shows the last viewed item, and you want to quickly display the user name of the user who viewed the item, you can use the **Caption** column to select the **Last Viewed By** user.

8. Optional. To reorder the statistic, click the **Move Up** or **Move Down** button until the statistic reaches the desired position.
9. Click **OK**.

   The statistic appears below the grid in the **Preview** pane.
10. In the **Preview** pane, click the **Run** button to test the statistic's performance.

Add a statistic for a flag value

You can add a statistic that distinguishes the number of search results that have a true or false (boolean) value. To add a statistic for a flag value, complete the following steps.

Prerequisite Before you can add a statistic for a flag custom property value, you must add the flag custom property column to the view.

2. In the **Preview** pane, click the **Statistics** button.
3. In the **Statistics** dialog box, click **Add**.
4. Under **Label**, type a label that describes the statistical function to appear in the search results grid.

   Example If adding a statistic to count the number of documents or records assigned to a retention policy, type `Documents in Retention` or `Records in Retention`.

5. Under **Column**, select the view column with the flag values.
6. Under **Function**, select **Count**.
7. Under **Variable**, select whether you want to count the results that meet the TRUE condition or the FALSE condition.
8. Optional. Under **Caption**, select the value to display when the statistic applies to only one search result.

Example If there is one version-controlled item in your search results, and you want to quickly display the user who marked the item private, you can use the **Caption** column to select the **Private By** user.

9. Optional. To reorder the statistic, click the **Move Up** or **Move Down** button until the statistic reaches the desired position.
10. Click **OK**.

    The statistic appears below the grid in the **Preview** pane.
11. In the **Preview** pane, click the **Run** button to test the statistic's performance.

Add a statistic for a list value

You can add a Count statistic that distinguishes a unique value of a list custom property. To add a statistic for a list value, complete the following steps.

Prerequisite Before you can add a statistic for a list value, you must first add the list custom property column to the view.

2. In the **Preview** pane, click the **Statistics** button.
3. In the **Statistics** dialog box, click **Add**.
4. Under **Label**, type a label that describes the statistical function to appear in the search results grid.

    Example If you have a list custom property to select the fiscal quarter associated with an invoice and you want to add a statistic to show fourth quarter invoices, type `Invoices in Q4`.
5. Under **Column**, select the list custom property.
6. Under **Function**, select **Count**.

    Note: Count is the only statistical function for list values.
7. In the **Variable** list, select an item from the list to use for the statistic.
8. Optional. Under **Caption**, select the value to display when the statistic applies to only one search result.

    Example If there is only one item added to workflow during the month of January, and you want to quickly display the user who added the item to workflow, you can use the **Caption** column to select the workflow user.
9. Optional. To reorder the statistic, click the **Move Up** or **Move Down** button until the statistic reaches the desired position.
10. Click **OK**.

    The statistic appears below the grid in the **Preview** pane.
11. In the **Preview** pane, click the **Run** button to test the statistic's performance.

Add a statistic for a numeric value

You can display the average, sum, median, or mode statistic that distinguishes numeric values, such as the number of tasks or a custom property that stores an amount value. To add a statistic for a numeric value, perform the following steps.

Prerequisite Before you can add a statistic for a flag custom property value, you must add the flag custom property column to the view.

2. In the **Preview** pane, click the **Statistics** button.
3. In the **Statistics** dialog box, click **Add**.
4. Under **Label**, type a label that describes the statistical function to appear in the search results grid.

   Example If adding a statistic to view the average amount of invoices, type `Average invoice amount`.
5. Under **Column**, select the view column with the flag values.
6. Under **Function**, select the display variable you want to show.
7. Optional. Under **Caption**, select the value to display when the statistic applies to only one search result.

   Example If a **Maximum** statistic displays the invoice with the highest amount, and you want to quickly display the user name of the user who last viewed the invoice, you can use the **Caption** column to select the **Last Viewed By** user.
8. Optional. To reorder the statistic, click the **Move Up** or **Move Down** button until the statistic reaches the desired position.
9. Click **OK**.

   The statistic appears below the grid in the **Preview** pane.
10. In the **Preview** pane, click the **Run** button to test the statistic's performance.

Add a statistic for a string value

You can add a non-case sensitive Count statistic that distinguishes string values, such as a task template or drawer name. To add a statistic for a string value, which you can add at the view or filter level, perform the following steps.

Prerequisite Before you can add a statistic for a flag custom property value, you must add the flag custom property column to the view.

2. In the **Preview** pane, click the **Statistics** button.
3. In the **Statistics** dialog box, click **Add**.
4. Under **Label**, type a label that describes the statistical function to appear in the search results grid.

   Example If adding a statistic to count the number of items scanned by the department manager, type `Scanned by Manager`.
5. Under **Column**, select the view column with the string values.

6. Under **Function**, select Count.

   Note: Count is the only statistical function for string values.

7. Under **Variable**, type the value for the statistic, such as the drawer name or task template name.
8. Optional. Under **Caption**, select the value to display when the statistic applies to only one search result.

   Example If there is only one items for a specific vendor in your workflow process, and you want to quickly determine if it is an invoice or a purchase order, you can use the **Caption** column to show the **Document Type**.

9. Optional. To reorder the statistic, click the **Move Up** or **Move Down** button until the statistic reaches the desired position.
10. Click **OK**. The statistic appears below the grid in the **Preview** pane.
11. In the **Preview** pane, click the **Run** button to test the statistic's performance.

Modify a statistic

To modify the components of a statistic defined for a view, complete the following steps.

2. In the **Preview** pane, click the **Statistics** button and then, in the **Statistics** dialog box, click the row of the statistic you want to change.
3. Do one of the following actions.
   - To change the statistic definition, highlight the statistic row and then modify the components you want to change.
   - To reposition the statistic, click **Move Up** to move it ahead of the preceding statistic, or click **Move Down** to move it after the following statistic.
4. Click **OK**.
5. In the **Preview** pane, click the **Run** button to test the statistic's performance.

Remove a statistic

To remove a statistic from a view, complete the following steps.

2. In the **Preview** pane, click the **Statistics** button.
3. In the **Statistics** dialog box, click the row of the statistic you want to remove and click **Remove**.
4. Click **Yes** in the confirmation prompt and then, in the **Statistics** dialog box, click **OK**.

Result Removing a statistic does not remove the column from the view.