



version 13.4

User Guide



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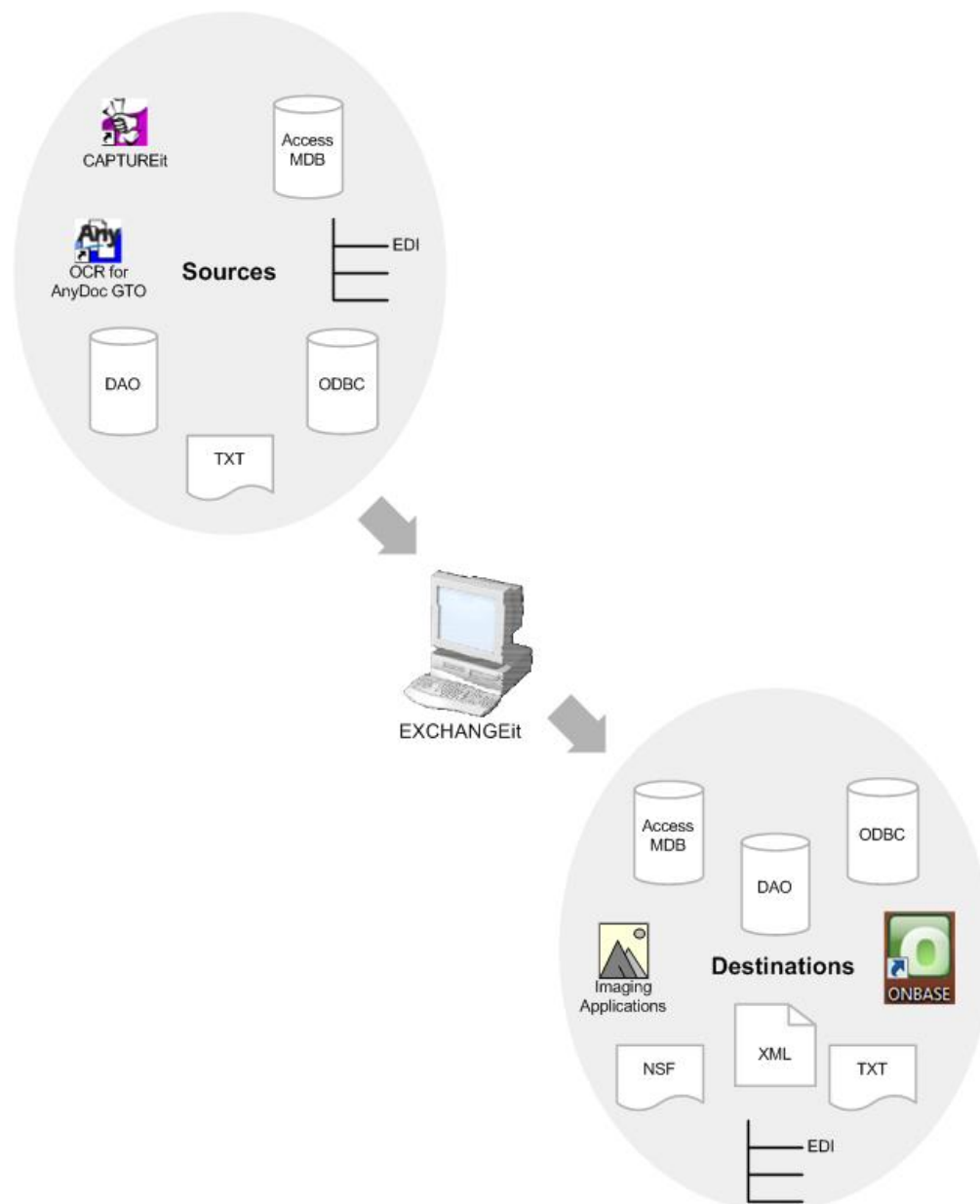
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Chapter 1

Introduction

AnyDoc® EXCHANGEit® is a standalone information transport tool that moves data, images, and their associated metadata from the source file or application to a destination file or application. EXCHANGEit is a bridge between incompatible data formats when moving data from a source to a destination.

Introduction



EXCHANGEit benefits any company interested in moving information from one application to another, including medical billing and insurance companies, government agencies and universities. EXCHANGEit is helpful to system administrators who want to avoid the continual cost of and time spent moving information to a mainframe. It is also helpful to developers who need to move data from a legacy database to a more powerful database.

See the EXCHANGEit Overview Flowchart (page [16](#)) for an illustration of the sequence of events that occur within an EXCHANGEit job.

EXCHANGEit overcomes the obstacles of moving information from a source to a destination in the following ways:

- **Unparalleled Compatibility**
EXCHANGEit supports many different sources and destinations. For more information about the currently supported sources and destinations, see the *EXCHANGEit User Guide*.
- **Efficient Automation**
Schedule recurring jobs to run automatically once or by hour, day, week, month, or year on a repeat basis for the specified number of minutes or hours. EXCHANGEit accommodates automatic batch transfer for large volumes of information.
- **VBScript Support**
By incorporating VBScript, manipulate information being transferred from the source before it is transferred to the destination. The Expression Builder, a code-generating tool, is provided for those who are unfamiliar with VBScript.
- **Exception Handler**
When an error occurs during processing, the Exception Handler logs the error to aid in investigating and correcting the cause. Additionally, the Exception Handler provides the option to edit incorrect data and reprocess the data without having to reprocess the entire job.

Getting Help

If you have any questions that are not answered in this document, contact AnyDoc Software, Inc. Technical Support (page [5](#)).

Before contacting Technical Support, gather the following information as it applies to the AnyDoc Software product:

- Product version number (page [10](#))
- Computer hardware specifications
- Operating system specifications
- Frequency and severity of the technical difficulties encountered
- Exact wording of any system-generated messages

The latest patches and drivers can be downloaded from our online library at <http://www.anydocsoftware.com>. A user ID and password are required and can be obtained by calling 1-888-4ANYDOC (1-888-426-9362).

Product Documentation

AnyDoc Software provides a documentation set for each application. All documentation is accessible from the application, installation-CD or Customer Library (page [12](#)). Review the documentation to learn how to use the application and answer any questions you may have about features.




All manuals are in Adobe Portable Document File (PDF) format. Download Adobe Reader for free at www.adobe.com/reader.

Documents within the set usually include:

- **New Features Guide**, which provides a list of new features and enhancements included in the latest and previous releases of the current major version.
- **Installation & Configuration Guide**, which provides instructions on installing and configuring the application.
- **User Guide**, which provides overviews and instructions on getting started, navigation, using features, and best practices.
- **Online Help**, which provides the same material as the *User Guides* in an online format. Access the online help from within the application. Updated Help files are also accessible from the customer library. Online Help files should always be saved locally rather than run from a network location.

Document Conventions

Within each document, the following symbols are used to draw your attention to certain types of information:

Symbol	Indication	Description
	Tip	Provides helpful hints, shortcuts, or alternate approaches for completing or reversing the specified task.
	Note	Provides additional information that could result in unexpected data results, if ignored, but should not cause any critical errors or system failure.
	Warning	Provides critical information that could result in data loss, unexpected results, or system failure, if ignored.

Contact AnyDoc Software, Inc. Technical Support

AnyDoc Software's Technical Support can provide you with the latest system requirements, assist you with any installation issues, and troubleshoot issues you are experiencing.

AnyDoc Software U.S.A. Office

Contact Technical Support via:

- **E-mail:**
anydocsupport@hyland.com
- **Fax:**
Address faxes to Technical Support and send to (813) 222-0018.
- **Telephone**
Call 1-888-4ANYDOC (1-888-426-9362) for telephone support between the hours of 9 A.M. and 6 P.M. (EST), Monday through Friday.

AnyDoc Software Europe Office

Contact Technical Support via:

- **E-mail:**
anydocisupport@hyland.com
- **Fax:**
Address faxes to Technical Support and send to +41-41-729-63-34
- **Telephone**
Call +41-41-729-63-33 for telephone support between the hours of 9 A.M. and 6 P.M. (Switzerland Time), Monday through Friday.

View Licensing Information

The following indicates how to obtain your licensing information, which may be helpful if Technical Support requests this information.

Steps

- 1 From the **Help** menu, click **Licensing | Current Licensing Info**. The **Licensing Information** window is displayed.
- 2 The **Licensing Information** window displays the licensed features for this workstation. Use the tabs at the left to navigate between the feature groups:

Introduction

- **General**

Displays all of the licensed features for the workstation. Metered features are included with a progress bar showing the volume of clicks used and remaining.

Information about the license account and (if applicable) hardware key serial number, key type, and driver is also displayed at the top of the window.

- **Metered Features**

If the workstation has any licensed metered features, click on the name of a metered feature to view a detailed count of the volume of clicks and/or days remaining for that feature.

If the licensed volume for a metered feature has been consumed, information on the feature's grace period is also displayed in this section. The allowed grace period is 10 percent of the total licensed volume for a feature. Once the grace period has been consumed, that feature of EXCHANGEit will not be available.

- 3 Click **Close** to close the **Licensing Information** window.

Configure the License Settings

The first time you run EXCHANGEit after installation, you are prompted to configure the license settings before the application can open. After the initial configuration, you can also reconfigure the license settings by adding the **-k** switch to the EXCHANGEit shortcut's properties and restarting the application. For more information, see [Working With Switches](#).

The following procedures describe how to configure the licensing settings for EXCHANGEit, depending on whether the workstation is using a USB hardware key ([page 6](#)) or a software license ([page 8](#)).

License Settings Using a USB Hardware Key

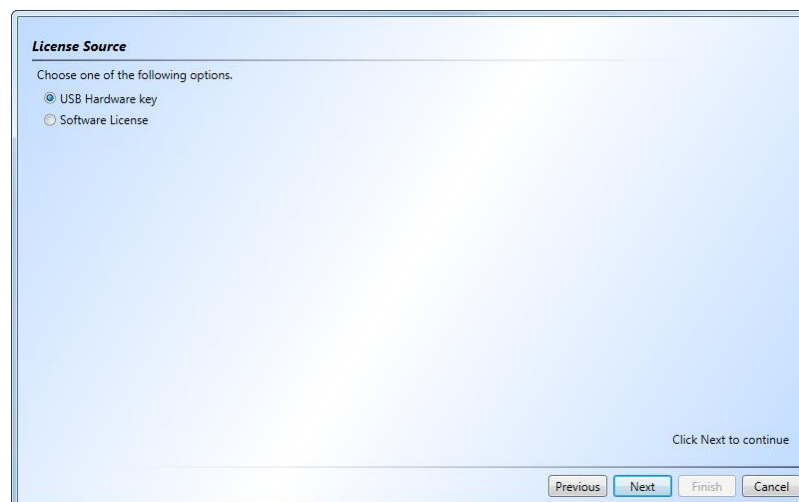
Follow these steps to use a hardware key that is attached to either the local workstation or a remote server or workstation. Before proceeding, make sure the hardware key is connected to the appropriate computer.

Steps

- 1 If this is the first time running EXCHANGEit since installation, start the application. Otherwise, add the **-k** switch to the EXCHANGEit shortcut's properties and start the application. The welcome screen of the Hyland AnyDoc Licensing Configuration Wizard is displayed.

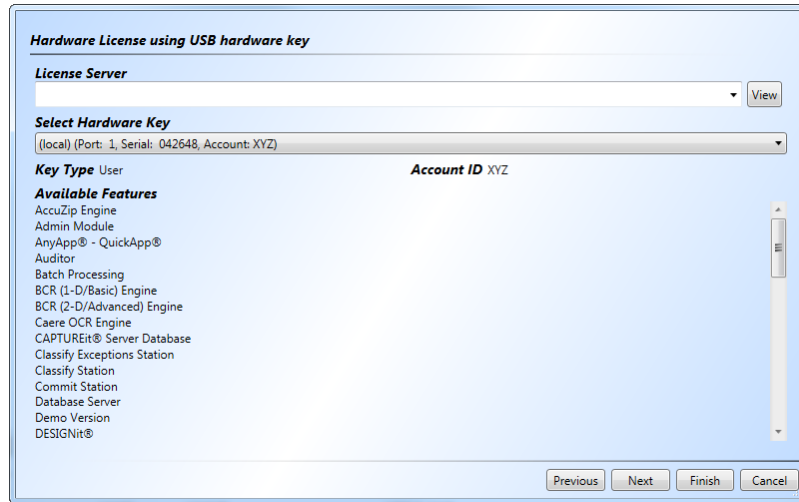


- 2 To protect the licensing settings for this product with a password, select the **Set or change password to configure these settings** check box. To leave the settings unprotected, leave the check box unselected. Click **Next**.
- 3 If applicable, in the **Update Password** dialog box, enter and verify the password to protect the license settings and click **OK**. The **License Source** window is displayed.



Introduction

- 4 Select **USB Hardware key** and click **Next**. The **Hardware License using USB hardware key** window is displayed.



- 5 In the **License Server** field, enter the name or use the drop-down list to select the name of the license server to which the hardware key is attached. Click **View**.
- 6 In the **Select Hardware Key** drop-down menu, select the hardware key to be used for licensing EXCHANGEit. Note that there may be more than one hardware key listed if the wizard detects additional keys on your network.
- 7 Confirm the **Available Features** listed and click **Next**.
- 8 Confirm the information for the hardware key and click **Finish**.
- 9 A dialog box reminds you to restart the application for the new settings to take effect. Click **OK** and restart EXCHANGEit.

License Settings Using a Software License

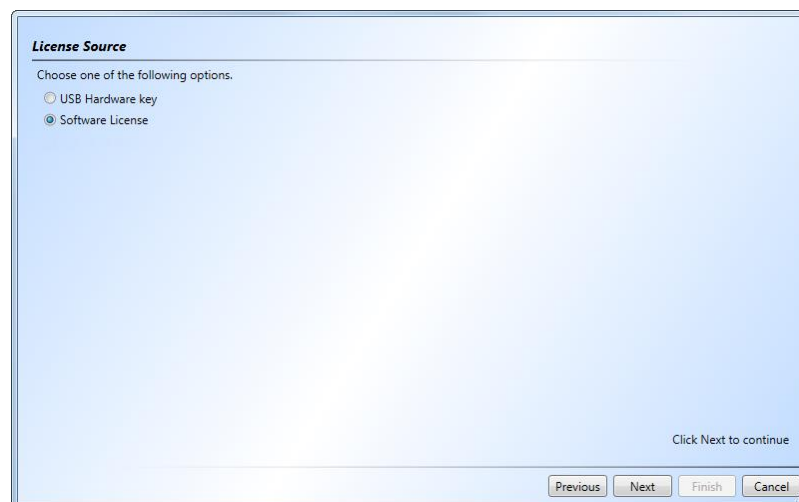
Follow these steps to use a software license that has been activated using the License Configuration Utility.

Steps

- 1 If this is the first time running EXCHANGEit since installation, start the application. Otherwise, add the **-k** switch to the EXCHANGEit shortcut's properties and start the application. The welcome screen of the Hyland AnyDoc Licensing Configuration Wizard is displayed.

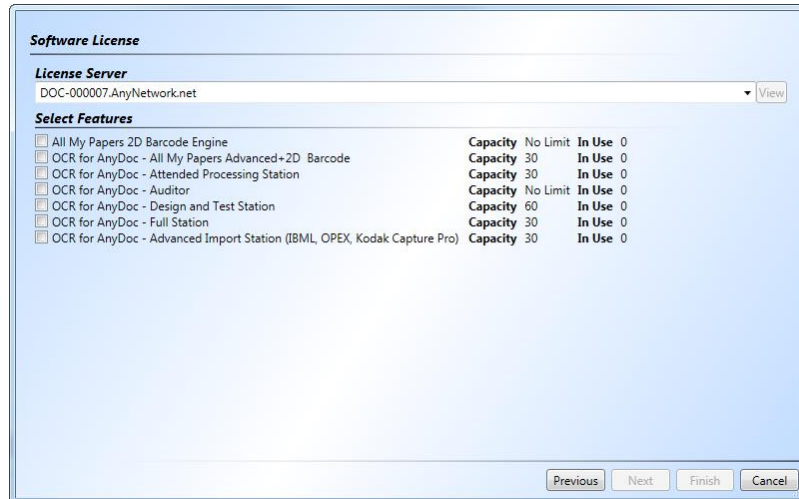


- 2 To protect the licensing settings for this product with a password, select the **Set or change password to configure these settings** check box. To leave the settings unprotected, leave the check box unselected. Click **Next**.
- 3 If applicable, in the **Update Password** dialog box, enter and verify the password to protect the license settings and click **OK**. The **License Source** window is displayed.



Introduction

- 4 Select **Software License** and click **Next**. The **Software License** window is displayed.



- 5 In the **License Server** field, enter the name or use the drop-down list to select the name of the license server on which the software license is activated. Click **View**.
- 6 In the **Select Features** section, select the check boxes next to any features to be licensed on this workstation. Note that you may need to select more than one feature to proceed, due to dependencies among some licensed features. Click **Next**.
- 7 Confirm the **License Server** and **Features** displayed and click **Finish**.
- 8 A dialog box reminds you to restart the application for the new settings to take effect. Click **OK** and restart EXCHANGEit.

View The Product Version Number

Steps

- 1 From the **Help** menu, click **About AnyDoc EXCHANGEit**.
The **About AnyDoc EXCHANGEit** window is displayed and includes the version number.
- 2 Click **OK** to close the window.

View The Accepted End-User License Agreement (EULA)

A copy of the End-User License Agreement that was accepted during the installation process is installed locally and can be viewed at any time.

Steps

- 1 From the **Help** menu, click **EULA Information**.
The EULA is displayed.
- 2 To close the window, click **OK**.
- 3 To print the window, click **Print**.

AnyDoc on the Web

Links to useful areas of the AnyDoc Software web site are provided under the **Help | AnyDoc® on the Web** menu.

Home Page	Access the AnyDoc Software home page (www.anydocsoftware.com) to read about new and upcoming events, access the Training schedule and learn about AnyDoc Software products, solutions and support.
End User License Agreement (EULA)	Read an online copy of the most recent version of the AnyDoc End User License Agreement (EULA).
Support Services	Learn about Annual Maintenance Plans for licensed software products and the offerings of Professional Services.
Customer Library	Access the latest versions of products and supporting documentation. See Customer Library (page 12).
Submit Enhancement Request	Access an online form to submit a request for a new product or document feature.

Activate Tracing

Tracing generates a log file of detailed job-related events. This log file can aid in troubleshooting errors that occur when processing a job. Select Tracing under **Preferences | Tracing | Trace Transactions**. The log file lists all transactions and what occurred during the transaction.

The log files are saved to the directory set up under **Preferences | Directories | Trace File Directory**.

Use the **Preferences | Tracing | Trace Detail** option only when requested to do so by the AnyDoc Software Technical Support staff. The details are for debugging purposes, and should be sent to AnyDoc Software Technical Support, if necessary.

Change Jobs Received from Technical Support

When you receive a job file (.XJB) from Technical Support, you need to modify the source and destination directories to match the directories used in your company's environment. Some sources and destinations allow you to change the file locations directly within the job file. These sources and destinations are listed below. The location within the job file to change the directories are provided.

Open the job file from Technical Support and access the following locations to change the job directory:

Sources

Source	Where to change the job directory
OCR for AnyDoc .GTO Files	Source Options tab GTO File Source field
Text Files	Source Options tab Text File Source field
XML Transform	Source Options tab XML File Specification field

Destinations

Destination	Where to change the job directory
Imaging Applications	Dest. Setup tab Edit Configuration button
Electronic Data Interchange	Dest. Options tab File Name field
Text File	Dest. Options tab File Name field
XML	Dest. Options tab File Name field
SAP	Dest. Options tab

For all other sources and destinations, use the job file provided by Technical Support as a model to set up a new job in your company's environment. Enter the settings in the job file from Technical Support into a new job and be sure to map to the appropriate file directories setup by your company.

Customer Library

AnyDoc Software's online Customer Library provides users with the ability to download documentation and software upgrades or patches. It also allows users to upload files to our Technical Support department (page [14](#)), if necessary.

Access and Login

AnyDoc Software's Customer Library is accessed via the Internet.

Steps

- 1 Access AnyDoc Software's website at www.AnyDocSoftware.com.
- 2 Select **Support | Customer Library**.
The **Customer Library Logon** page is displayed.
- 3 Enter your assigned **User Name** and **Password**.
If you do not have a user name and password, contact Technical Support (page 5).
The main **Customer Library** page is displayed.

Customer Library Options

In addition to providing access to documentation, new versions of software, and software patches and upgrades, the main Customer Library page allows you to upload a file to Technical Support, view past issues of AnyDoc Software's e-newsletter, inFORMer, and submit product enhancement requests. The following options appear on the main Customer Library page:

Upload a file to Tech Support

Click this button to upload a file to the AnyDoc Software Technical Support department. For information about uploading files, see Upload a File to Technical Support (page 14).

Agreements

Click this link to access the latest copy of the End User License Agreement (EULA).

AnyDoc Support

Click this link to access documentation and patches for AnyDoc Software applications. For information about downloading this information, see Download Patches and Documentation (page 14).

Sales and Marketing

Click this link to obtain sales and marketing materials for AnyDoc Software's VARs and Partners.

Home Page

Click this link to exit the Customer Library and return to the AnyDoc Software home page.

Enhancement Request Form

Introduction

Click this link to open the Enhancement Request form. Customers submit this form to request new features or functionality for a product.

Prospect Tracking Site

Click this link to access your company's prospects.

Java Plug-in

Click this link to download the Java plug-in for forms created with FORMit™.

Upload a File to Technical Support

Steps

- 1 Log in to the Customer Library, and click **Upload a file to Tech Support**. The **File Upload** page is displayed.
- 2 Click **Browse** to locate the file that you want to upload.
- 3 Click **Upload File** to upload the file to Technical Support.

Download Patches and Documentation

Steps

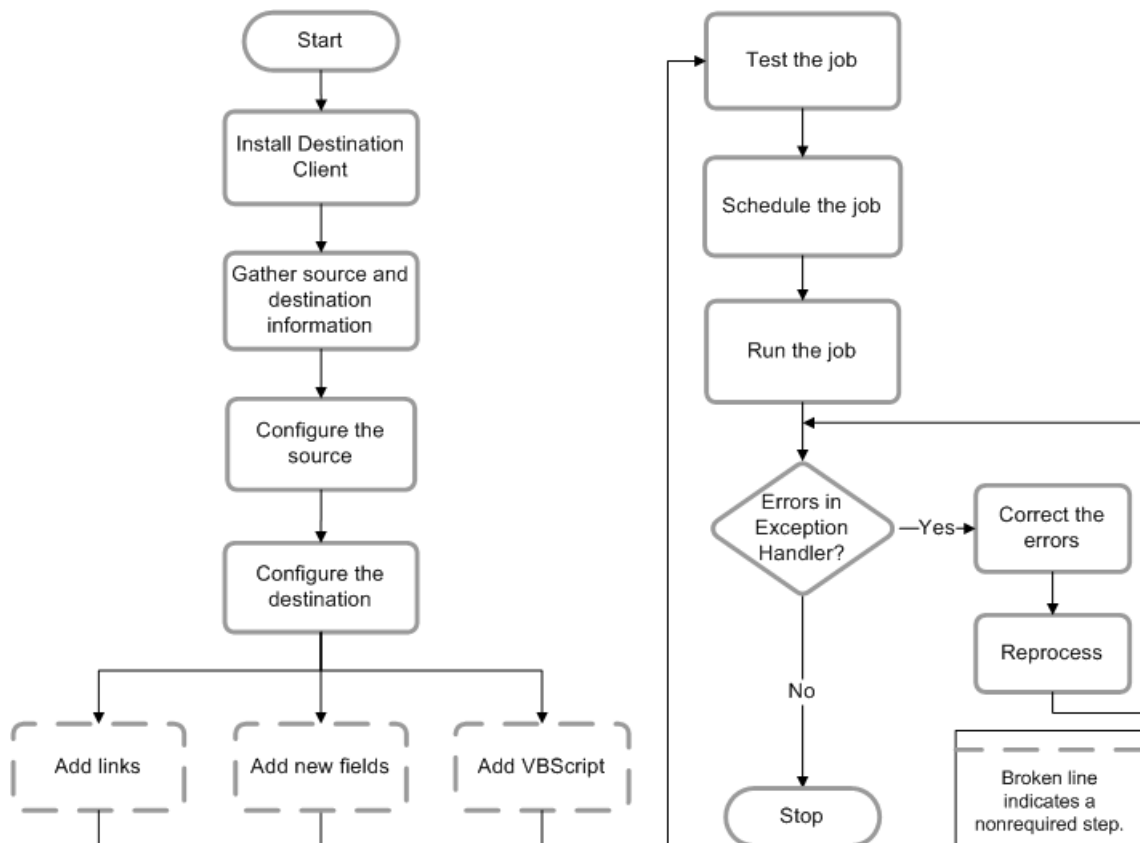
- 1 Log in to the Customer Library and click the **AnyDoc Support** link. The AnyDoc Support page provides access to software and documentation files for each product.
- 2 Click the *Product Name* link to access software upgrades and documentation for that product. The main library page for the product appears.
Files in the product library are grouped by file type. Each link leads to a different file type. The file types are:
 - **Patches**
Click this link to access upgrade patches for minor (sub-version) upgrades, such as upgrades from 3.2.2 to 3.2.3 and *New Features Guides*.
 - **Technical Documents**
Click this link to access technical documents.
 - **User Guide & Help Files**
Click this link to access *User Guides*, *Reference Guides* and Help files.
- 3 Click the *File Type* link. The main page for the selected file type appears. On the file type's main page are links to the different version numbers available as well as links to any files that are not version-specific.

- 4 Click the *Version Number* link to access files for that version.
- 5 Click a file name to download the file.

Chapter 2

Getting Started

EXCHANGEit Overview Flowchart



Configure Directory Preferences

The Directory and Computer Settings window defines default locations to access and save various files. For example, when setting up a GTO file source, EXCHANGEit defaults to the folder defined in the GTO File Directory field.

Accept the default directories, or set the preferred directory locations. At minimum, set the following directories:

- Job File Directory

The Job File Directory is the default location to save the job (.XJB) file.


- Trace File Directory

The Trace File Directory is the location to save tracing log files.

Steps

- 1 Select **Preferences | Directories**.

The **Directory and Computer Settings** window is displayed.

- 2 Click the **Browse** button, , and set the preferred directory locations for each type of saved file.

The paths can be specified with either a mapped network drive or a Universal Naming Convention (UNC) path (page [393](#)). However, to run OCR for AnyDoc or EWS as a service, UNC paths are required.

Getting Started

If EXCHANGEit exceptions will be processed from within OCR for AnyDoc, then the Job File Directory must be a network location and the OCR for AnyDoc station must also have access to the specified directory.

- 3 To move exceptions to a newly created Exceptions folder within the specified OCR Control Path, select the **Move/Store Exceptions in the OCR Control Path** check box.

This is necessary if:

- MANAGEit is going to monitor these exceptions.
- EXCHANGEit exceptions will be reprocessed from within OCR for AnyDoc.

- 4 Click **OK** to save and close the Directory and Computer Settings window.

Chapter 3

Security

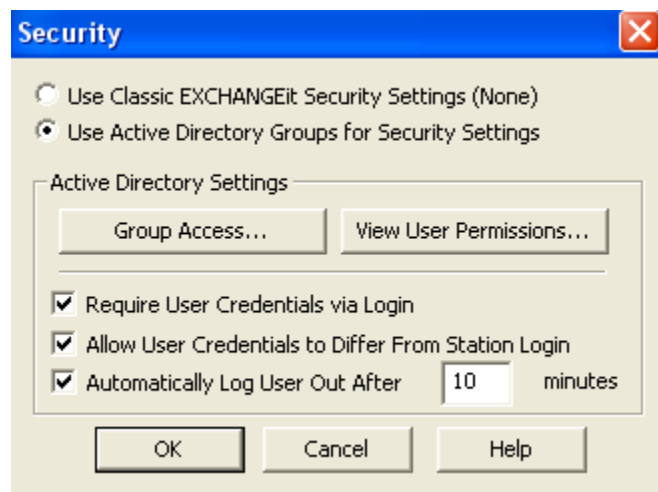
Security can be set at the group level only, not the user level. The available groups are the same as those available on your network. Groups cannot be created or deleted within EXCHANGEit.

Security Preferences

The security settings control access to EXCHANGEit. If security settings are applied, they are inherited from the system's active directory and are based on group memberships and permissions.

Steps

- 1 From the **Preferences** menu, click **Security**.
- 2 The **Security** window is displayed.

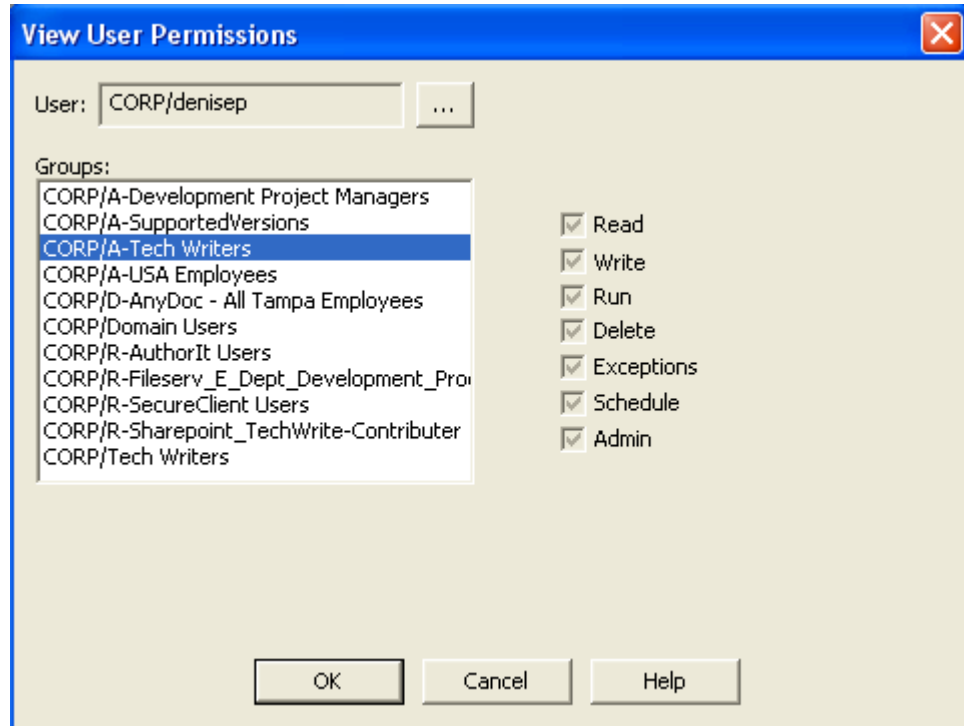



- 3 Select one of the following options:
 - **Use Classic EXCHANGEit Security Settings (None)**
No security settings are applied.
 - **Use Active Directory Groups for Security Settings**
EXCHANGEit inherits all group information from the Microsoft Windows Active Directory settings.

Security

- 4 To select the users who should have access to EXCHANGEit, Click **Group Access**. Access can be granted to all users or just those who belong to specific groups. For more information, see Set Active Directory Group Access (page [21](#)).
- 5 To view the current user's group membership and the inherited permissions, click **View User Permissions**.

The **View User Permissions** window is displayed. The information displayed on this window is read-only and cannot be modified.



- 6 To view user permissions for another user, click  and select another user.
- 7 Click **OK** to return to the **Security** window.
- 8 To require users to successfully enter their user name and password every time they try to access EXCHANGEit, select the **Require User Credentials via Login** check box.
- 9 To allow users to login to EXCHANGEit as a different user, select the **Allow User Credentials to Differ from Station Login** check box. However, if the current user is not authorized to access EXCHANGEit they will be prompted to log in.
If this option is selected in conjunction with the **Require User Credentials via Login** option, the user can log in with different login information from the station's user ID and password.

- 10 To automatically log a user out after the station is idle for the specified period of time, select the **Automatically Log User Out after** check box and enter a number in the ___ **Minutes** field.

This option is only available if at least one of the previous check boxes are also selected. The default is 10 minutes.

- 11 Click **OK**.

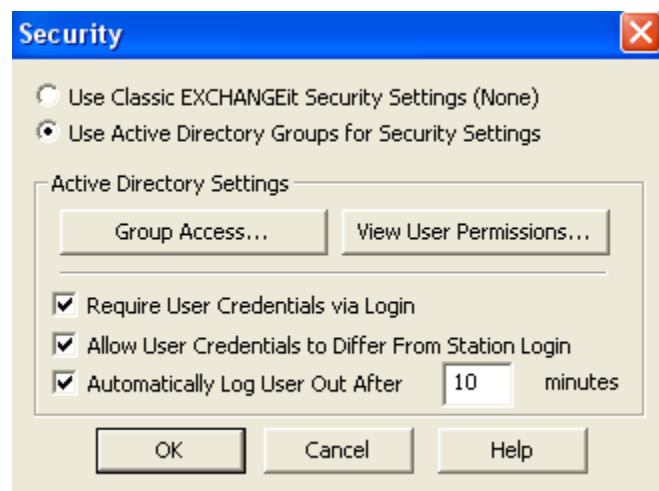
Set Active Directory Group Access

If access to EXCHANGEit is being granted based on the system's Active Directory settings, then it must be specified if all users should be granted access or only users in selected groups.

Steps

- 1 From the **Preferences** menu, click **Security**.

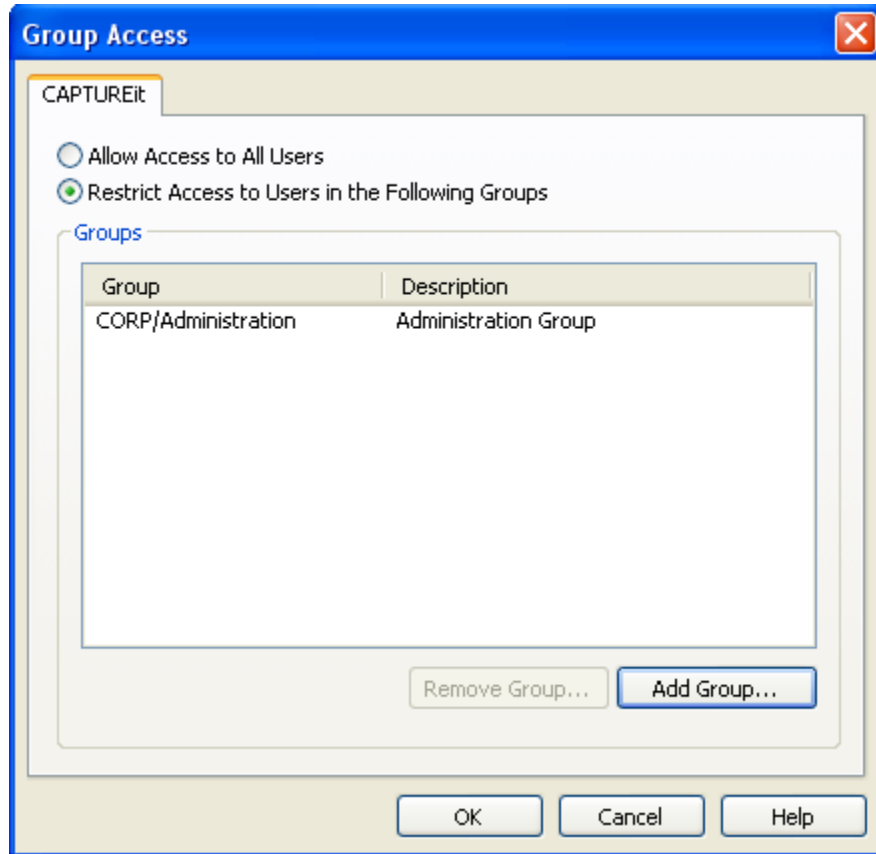
The **Security** window is displayed.



- 2 Verify the **Use Active Directory Groups for Security Settings** option is selected.
- 3 Click **Group Access**.

Security

The **Group Access** window is displayed.



- 4 Select one of the following options, based on who should be granted access to the base path:
 - **Allow Access to All Users**

All users who are members of any group that is listed in the active directory can access the control path.
 - **Restrict Access to Users in the following groups**

Limits access to users in the groups selected from the displayed list.
- 5 If **Restrict Access to Users in the following groups** is selected:
 - Click **Add Group**.
 - In the **Select Groups** window, enter the group name or click **Advanced** to search for a group.
 - Click **Check Names** to verify the group name is valid.
 - Click **OK**.

- 6 Click **OK**.
- 7 Click **OK**.

Assign Group Permissions

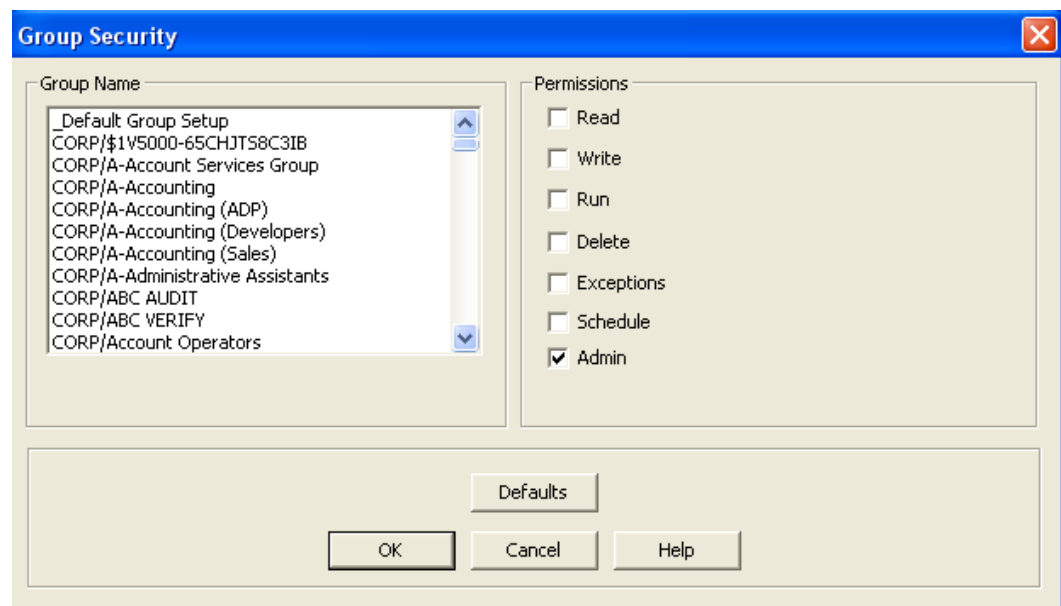
Permissions can be assigned to available groups, not at the individual user level. The permissions granted to a group are applied to all members of that group. If a user doesn't belong to any group with permissions, then they are assigned the default group permissions, which includes all available permissions.

Groups cannot be created or deleted within EXCHANGEit. They must be managed on the network.

Steps

- 1 From the **Management** menu, click **Security**.

The **Group Security** window is displayed.



- 2 In the **Group Name** section, select a group.
- 3 In the **Permissions** section, select the actions that members of the selected group can perform. Permissions include:
 - **Read**
Members of the group can read a job.
 - **Write**

Security

Members of the group can create a new job.

- **Run**

Members of the group can run a job.

- **Delete**

Members of the group can delete a job.

- **Exceptions**

Members of the group can process exceptions that are created when a job is run.

- **Schedule**

Members of the group can schedule jobs to run at specified intervals.

- **Admin**

Members of the group can configure various options in EXCHANGEit.

4 Click **OK**.

Chapter 4

Sources

Sources contain the data that is transferred to one or more destinations. This section contains instructions on creating each source that is available in EXCHANGEit and using the options available within each source. Some options are common for all sources, while others are unique to the source. After a source type is selected, it cannot be edited; only the details for the source can be modified. To change the source, reset it or create a new source.

If you understand how to work with one source database such as Access, ODBC, or DAO, it is easy to work with similar sources because the configuration process is nearly identical. When working with sources:

- Ensure the source is either installed or accessible from the workstation.
- Know how to access the source data.
- Ensure the login used has proper access permissions for the source.

EXCHANGEit provides several different source types:

- **OCR for AnyDoc GTO Files:** For more information, see OCR for AnyDoc GTO File as a Source (page [32](#)).
- **AnyDoc CAPTUREit:** For more information, see AnyDoc CAPTUREit as a Source (page [46](#)).
- **Access Database:** For more information, see Access Database as a Source (page [54](#)).

A separate source was provided for an Access database because an Access database is a common source; however, the ODBC Databases source can also be used to transfer data from an Access database.

- **DAO Databases/Jet 4 Drivers:** Transfer information from Btrieve, dBase, FoxPro and Paradox databases. DAO (Data Access Objects) databases are accessed by Microsoft's Jet database engine. For more information, see DAO Database/Jet 4 Drivers as a Source (page [59](#)).
- **ODBC Databases:** Transfer information from ODBC-compliant databases such as Oracle, SQL Server, Sybase and Visual FoxPro databases. For more information, see ODBC Database as a Source (page [66](#)).
- **EDI Files:** For more information, see Electronic Data Interchange (EDI) Files as a Source (page [71](#)).

Sources

- Text Files: Transfer information from text files that are fixed or delimited. For more information, see Text File as a Source (page [77](#)).
- **XML Transform:** For more information, see XML Transform as a Source (page [89](#)).

Project Planning

Before proceeding, identify the file name, extension and location of the source file. It is helpful to create a plan that describes how and where to move the information. Below are some questions to consider.

- What are the file names, extension, and location of the source file?
- From how many sources are you transferring information? After configuring the initial source, links can be created to configure additional sources. See Links/New Fields (page [259](#)).
- Which particular fields are involved in the information transfer? You may not want to transfer all the information in the source file to the destination. Information transfer is determined when mapping fields.
- At what time and how often do you want to transfer information? Information can be scheduled to transfer at intervals of hours, days, weeks, months, and years. It can be set up to poll for data or transfer at commit.
- What is the destination configuration?

Configuring Sources

A source is configured in five steps. An optional tab for entering VBScript is also provided. The steps correlate with each source tab and must be completed in the order of the tabs from left to right, as follows:

- 1 **Source Desc.** - Name of the source and any comments regarding the specific project. The source's description displays on the source node. This tab is completed in the same manner for all sources. See Add a Source Description to Any Source (page [29](#)).
- 2 **Source Setup** - Indicates the source type, location and name of the file containing the information to transfer to the destination. Additional information may need to be specified depending on the source. Each source is uniquely set up in this tab folder.
- 3 **Source Mappings** - Displays the available fields that can be mapped to the destination. Mapping refers to the process of assigning source information fields to

destination fields and is performed when configuring the destination.

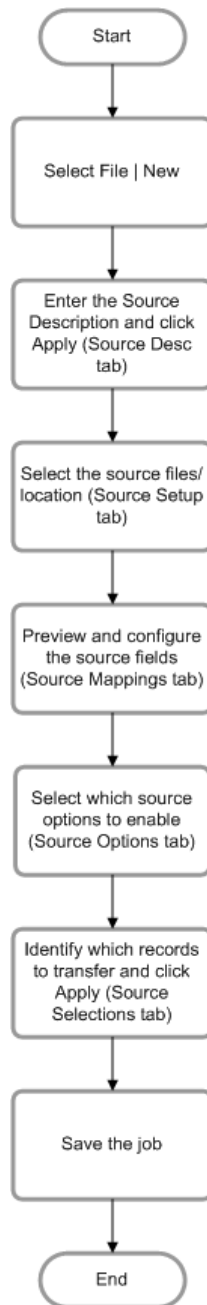
A View Source button is provided to view the source content. It provides a way to determine the organization of the source data. If the source data contains blank lines or missing content, the output could be affected. The View Source button changes to a Refresh Source button after viewing the source for the first time. The Refresh Source button updates the source information displayed in the Source Mappings tab after a change is made.

- 4 Source Options** - Provides different options available to the source. If the source is a database, the database login information must be defined.
- 5 Source Selection** - Indicates which records to transfer from the source.
- 6 Job Scripts** - Where VBScript is being run on the source, if applicable. The Expressions Builder is accessed from this tab folder to add VBScript to the project. See Use VBScript (page [307](#)).

See the Source Configuration Flowchart (page [28](#)) for an illustration of the five step process to define sources.

Sources

Source Configuration Flowchart



Add a Source Description

All sources have a **Source Desc.** tab to name the source and enter any comments or additional information regarding the source. The source description must be considered carefully if using VBScript. The following guidelines should be considered when creating a source description if VBScript is used:

- Use only alpha-numeric characters.
- Do not begin the source description with a number.
- Do not use spaces.
- Changing the description can impact VBScript.

Steps

- 1 Select **File | New**.
The **Source Configuration** window is displayed.
- 2 Enter a source name in the **Description** field.
- 3 Enter any notes regarding this source in the **Comments** field.
- 4 Click **Apply**. The source name entered in the Description field appears on the source node in the left pane of the window.
- 5 Select **File | Save** or **File | Save As** to save the project. The file is saved with an .XJB extension.

Field Length

Field length defines the maximum number of characters that a field can hold. If the field value exceeds the field length, the characters are truncated. If the field value does not exceed the field length, the entire field value is entered into the field. For fields in fixed width text files, spaces fill in the character placeholders that are not filled in by the field value. For other file types, the field displays as is without any conventions to fill in the empty characters.

For example, field LastName holds up to 10 characters.

If the field value is "Doe," the field value is output as follows:

Fixed Width Text File	All Other File Types
"Doe "	"Doe"

If the field value is "Hammerstein," the field value is output as follows:

Sources

Fixed Width Text File	All Other File Types
"Hammerstei"	"Hammerstei"

Where Field Length is Defined

Field length is not defined in EXCHANGEit. It is defined in the database table, file or application selected as the source and destination. The field length is visible in EXCHANGEit, however, in the Source Mappings and Dest. Mappings tab | Length column.

The EXCHANGEit History Database (page [293](#)) indicates when a field is truncated.

Fully Qualified and Unqualified Fields

The option is given to toggle between showing field labels as fully qualified or unqualified in the Source Mappings and Dest. Mappings grids and column headings. This option is located on the **Source Options** tab. A check mark displays next to the **Show Fully Qualified Fields** option when the option is selected. When toggling between qualified and unqualified fields, click **Refresh Fields** on the **Source Mappings** tab for both the source and destination to refresh the column headings.

Fully Qualified Fields

Fully qualified fields display both the source and field label, separated by a period.

For example, if the template name is "1999aiim" and the field label is "FName" the field name displays as "1999aiim.FName" in the grid and column headings.

Source Desc.	Source Setup	Source Mappings	Source Options	Source Selections	Job Scripts			
1	Available Fields	Field Type	Length	Scale	Default Val	Key?	Propagate?	Image?
2	B_NBR_OF_D...	Char	50			<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3	VERSION	Char	50			<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4	tricare.DS_PG...	Char	50			<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5	tricare.Find last ...	Char	50			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6	tricare.DocSet	Char	50			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7	tricare.Find EOB	Char	50			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
8	tricare.Default	Char	50			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
9	tricare.Find First...	Char	50			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
10	tricare.Controller	Char	50			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	tricare.Address...	Char	50			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

View Source Refresh Fields Report Help

B_NBR_OF_DOCS	VERSION	tricare.DS_PGSEQ	tricare.Find last DocSet	tricare.DocSet	tricare.Find EOB	tricare.Default	tricare.Find First
2	3.2.6	0002	--	--	1	0	0
2	3.2.6	0002	--	--	--	--	--
2	3.2.6	0002	--	--	--	--	--
2	3.2.6	0002	--	--	--	--	--
2	3.2.6	0002	--	--	--	--	--
2	3.2.6	0002	--	--	--	--	--
2	3.2.6	0002	--	--	--	--	--
2	3.2.6	0002	--	--	--	--	--

Fully qualified field names help differentiate between fields and zones in different templates. Fully qualified fields should be used in the following situations:

- When document sets are used for a specific template.
- Fields are mapped from templates containing common field names.

Sources

Unqualified Fields

Unqualified fields display only the field label. For example, "FName". Unqualified fields should be used if the destination is receiving data from multiple destinations with the same field.

Source Desc.	Source Setup	Source Mappings	Source Options	Source Selections	Job Scripts			
	Available Fields	Field Type	Length	Scale	Default Val	Key?	Propagate?	Image?
1	B_NBR_OF_D...	Char	50			<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2	VERSION	Char	50			<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3	DS_PGSEQ	Char	50			<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4	Find last DocSet	Char	50			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5	DocSet	Char	50			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6	Find EOB	Char	50			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7	Default	Char	50			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
8	Find First Page	Char	50			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
9	Controller	Char	50			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
10	Address_NC	Char	50			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

View Source Refresh Fields Report Help

B_NBR_OF_DOCS	VERSION	DS_PGSEQ	Find last DocSet	DocSet	Find EOB	Default	Find First Page	Controller	Address
2	3.2.6	0002	--	--	1	0	0	--	CONNEC
2	3.2.6	0002	--	--	--	--	--	--	--
2	3.2.6	0002	--	--	--	--	--	--	--
2	3.2.6	0002	--	--	--	--	--	--	--
2	3.2.6	0002	--	--	--	--	--	--	--
2	3.2.6	0002	--	--	--	--	--	--	--
2	3.2.6	0002	--	--	--	--	--	--	--
2	3.2.6	0002	--	--	--	--	--	--	--

OCR for AnyDoc GTO File as a Source

The OCR for AnyDoc .GTO file is the most common source. The .GTO files contain information processed in OCR for AnyDoc in a format optimized for easy transfer to other applications. The zones in the template must be named for the zones to display in EXCHANGEit.



Zones are named in the OCR for AnyDoc Template Designer using Data Definition zone parameters, accessed by selecting P-Oil Can + D.

The following examples show a .TIF image of a time card and the corresponding .GTO file containing the information from the time card.

.TIF Image

Time Card
Lucky Temporary Staffing Inc.

First Name: **ERIC** Last Name: **HALBERG** Employee Number: **222813041** Week Ending: **03-06-98**

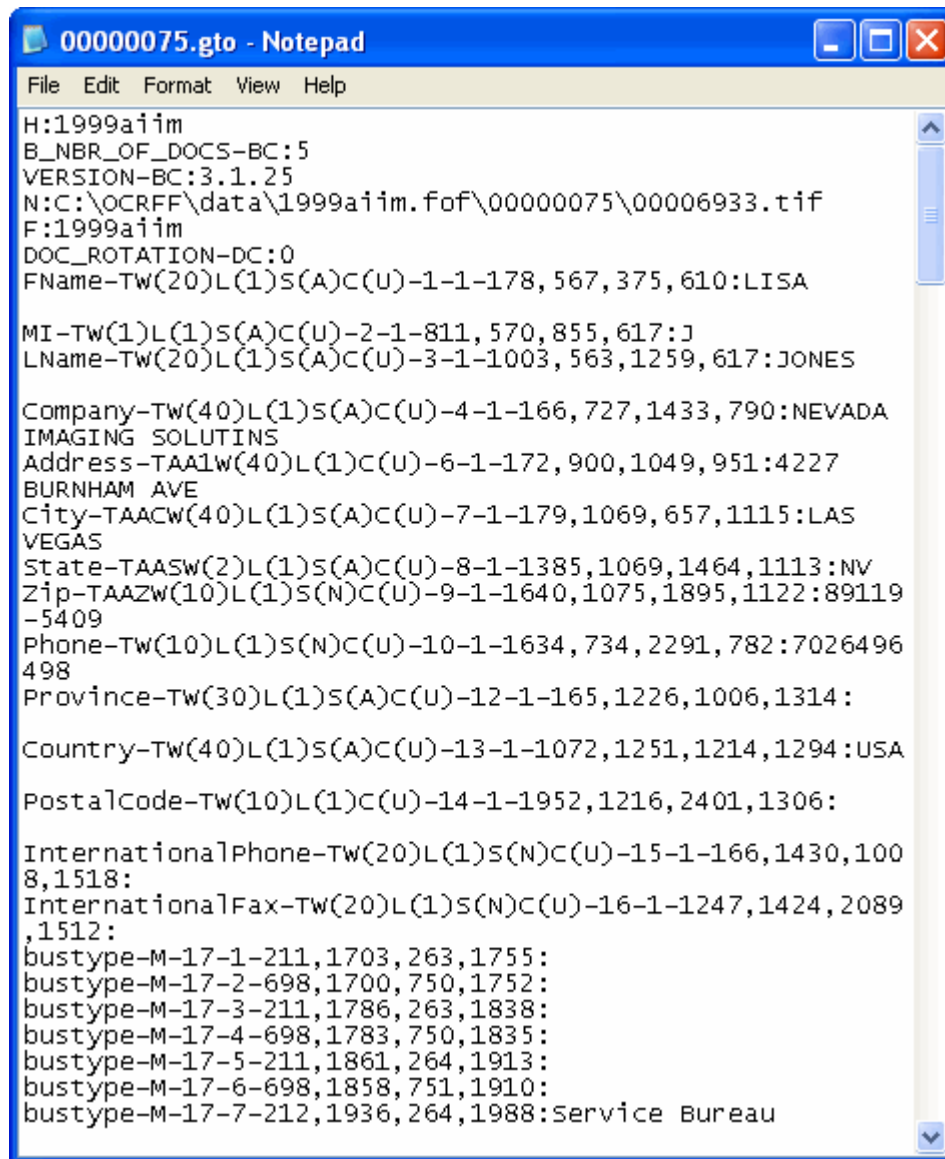
Customer Name: **LUCKY CHARMS** Customer Number: **123456789** Job Number: **A30525371**

	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday	
	Hrs	Mins	Hrs	Mins	Hrs	Mins	Hrs	
Example	08	00	08	50	10	75	09	10
Hours	09	00	10	25	15	60	08	15
Hours Off	00	15	01	00	03	50	10	00
Hours Worked	08	45	09	25	12	10	02	15

Signature: *[Signature]* Certify that all information is CORRECT!!!
Employee: *[Signature]* Customer: *[Signature]*

Total Weekly Hours Worked: **60 05**

.GTO File



```

File Edit Format View Help
H:1999a\im
B_NBR_OF_DOCS-BC:5
VERSION-BC:3.1.25
N:C:\OCRFF\data\1999a\im.fof\00000075\00006933.tif
F:1999a\im
DOC_ROTATION-DC:0
FName-TW(20)L(1)S(A)C(U)-1-1-178,567,375,610:LISA

MI-TW(1)L(1)S(A)C(U)-2-1-811,570,855,617:J
LName-TW(20)L(1)S(A)C(U)-3-1-1003,563,1259,617:JONES

Company-TW(40)L(1)S(A)C(U)-4-1-166,727,1433,790:NEVADA
IMAGING SOLUTIONS
Address-TAA1W(40)L(1)C(U)-6-1-172,900,1049,951:4227
BURNHAM AVE
City-TAACW(40)L(1)S(A)C(U)-7-1-179,1069,657,1115:LAS
VEGAS
State-TAASW(2)L(1)S(A)C(U)-8-1-1385,1069,1464,1113:NV
Zip-TAAZW(10)L(1)S(N)C(U)-9-1-1640,1075,1895,1122:89119
-5409
Phone-TW(10)L(1)S(N)C(U)-10-1-1634,734,2291,782:7026496
498
Province-TW(30)L(1)S(A)C(U)-12-1-165,1226,1006,1314:

Country-TW(40)L(1)S(A)C(U)-13-1-1072,1251,1214,1294:USA

PostalCode-TW(10)L(1)C(U)-14-1-1952,1216,2401,1306:

InternationalPhone-TW(20)L(1)S(N)C(U)-15-1-166,1430,100
8,1518:
InternationalFax-TW(20)L(1)S(N)C(U)-16-1-1247,1424,2089
,1512:
bustype-M-17-1-211,1703,263,1755:
bustype-M-17-2-698,1700,750,1752:
bustype-M-17-3-211,1786,263,1838:
bustype-M-17-4-698,1783,750,1835:
bustype-M-17-5-211,1861,264,1913:
bustype-M-17-6-698,1858,751,1910:
bustype-M-17-7-212,1936,264,1988:Service Bureau

```

Process Total Sets

Total sets are created in AnyDoc Software's AnyApp application and can be output to .GTO files. To view data in the Total Set, open the .GTO file in Notepad and locate the **T:** section. The .TIF snippet immediately follows T: on the same line. The Total Set fields and values begin below the T: line and end at the next image line (**N:**).

If your .GTO source file contains Total Sets, there are three different ways to process the data and images in Total Sets.

- Process as a Total Set
- Process as multiple records per image
- Process as one record per image

The option you choose depends on how you want to display the data, by snippet or by image. Total Set options are in the **Source Options** tab.

Source Desc. | Source Setup | Source Mappings | **Source Options** | Source Selections | Job Scripts

☐ Process Snippets as Attachments
☐ Qualified Field Names
☒ **Multiple Records Per Image**
☐ Process Total Sets
☐ Process EOB Sets from OCR 4.0.3 or Lower
☐ Process OCR for AnyDoc® Document Sets
☐ Control Suffixes (e.g. -BC & -DC)
☐ Process Attachments as Documents
 First Template In Document Set:
 GTO Sources:

☐ Include Subdirectories

☒ Move .GTO File After Processing
 Source Path:
 Subdirectory Type:
☐ Move Images After Processing
 Source Path:
 Subdirectory Type:
☒ Delete Source Folder After Processing (if empty)

Process as a Total Set

Process the data as a Total Set if you want to process the data together. If the Total Set is processed together, the image data is displayed by snippet. Each record associated with the snippet displays in the row below the snippet. The data is not split by image or page number.

To process the Total Set together, select the **Process Total Sets** check box on the Source Options tab.

Sources

In the example below, the multipage .TIF is processed as a Total Set. The image files display as snippets in the Source Mappings tab. If the snippet has a record, the record follows the snippet in the next row.

Source.Image_File
O:\OCRFF\data\cdp.fof\TS_00000247_00001_1.tif
O:\OCRFF\data\cdp.fof\TS_00000247_00002_1.tif ← Snippet
-- ← Record
O:\OCRFF\data\cdp.fof\TS_00000247_00002_2.tif
--
O:\OCRFF\data\cdp.fof\TS_00000247_00003_3.tif
O:\OCRFF\data\cdp.fof\TS_00000247_00003_4.tif
O:\OCRFF\data\cdp.fof\TS_00000247_00003_5.tif
O:\OCRFF\data\cdp.fof\TS_00000247_00003_6.tif
--
--
--
O:\OCRFF\data\cdp.fof\TS_00000247_00004_7.tif
O:\OCRFF\data\cdp.fof\TS_00000247_00004_8.tif
O:\OCRFF\data\cdp.fof\TS_00000247_00004_9.tif
O:\OCRFF\data\cdp.fof\TS_00000247_00004_10.tif
--
--
O:\OCRFF\data\cdp.fof\TS_00000247_00004_11.tif
--
--
O:\OCRFF\data\cdp.fof\TS_00000247_00005_12.tif

Process as Multiple Records Per Image

You can choose not to process the Total Set together. Instead, you can process by each image and the records within the image. In this option, the data is separated by the page on which the image occurs. Each record associated with the image displays in the row below the image file.

To process by image and the records within the image, select the **Multiple Records Per Image** check box on the Source Options tab.

In the example below, the multipage .TIF and records are not processed as a Total Set. The image files display per page in the Source Mappings tab, rather than by snippet. If the image contains a record, the record follows the image in the next row.

Source.Image_File	
O:\OCRFF\data\cdp.fof\00000389.tif	← Image 1
O:\OCRFF\data\cdp.fof\00000390.tif	← Image 2, Page 1
--	
--	← Image 2 Records
--	
O:\OCRFF\data\cdp.fof\00000390.tif	← Image 2, Page 2
--	
--	← Image 2 Records
--	
--	
O:\OCRFF\data\cdp.fof\00000390.tif	← Image 2, Page 3
--	
--	
--	← Image 2 Records
--	

Process as One Record Per Image

Option three is to process each image as one record. In this option, the data on each image is concatenated, meaning all field entries for the same field are combined on each page. Therefore, there is one row of data for each image in the Total Set. This option is not recommended.

To process the Total Set as one record per image, clear the following check boxes on the Source Options tab:

- **Process Total Sets**
- **Multiple Records Per Image**

In the example below, the multipage .TIF and records are not processed as a Total Set. The image files display per page in the Source Mappings tab, rather than by snippet. The image serves as one record and the field values for the same field are grouped into one field value per page.

Source.Image_File
O:\OCRFF\data\cdp.fof\00000389.tif
O:\OCRFF\data\cdp.fof\00000390.tif
O:\OCRFF\data\cdp.fof\00000390.tif
O:\OCRFF\data\cdp.fof\00000390.tif
O:\OCRFF\data\cdp.fof\00000390.tif
O:\OCRFF\data\cdp.fof\00000390.tif
O:\OCRFF\data\cdp.fof\00000390.tif
O:\OCRFF\data\cdp.fof\00000390.tif
O:\OCRFF\data\cdp.fof\00000390.tif

← All images in Total Set

Source Setup for a GTO File

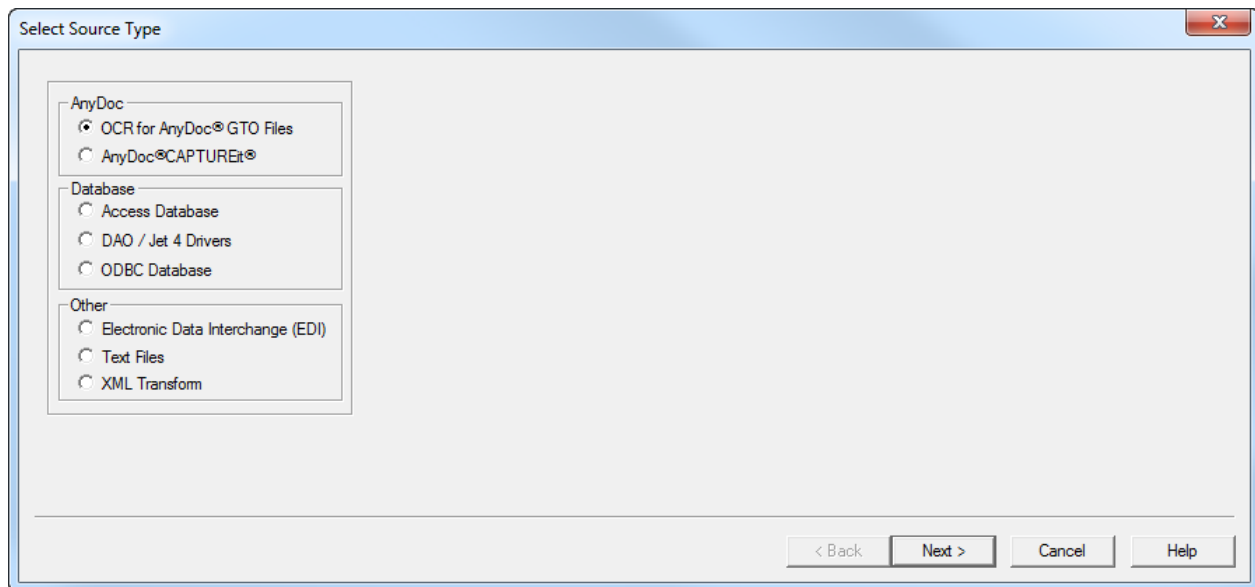
Steps

- 1 Click the **Source Setup** tab.

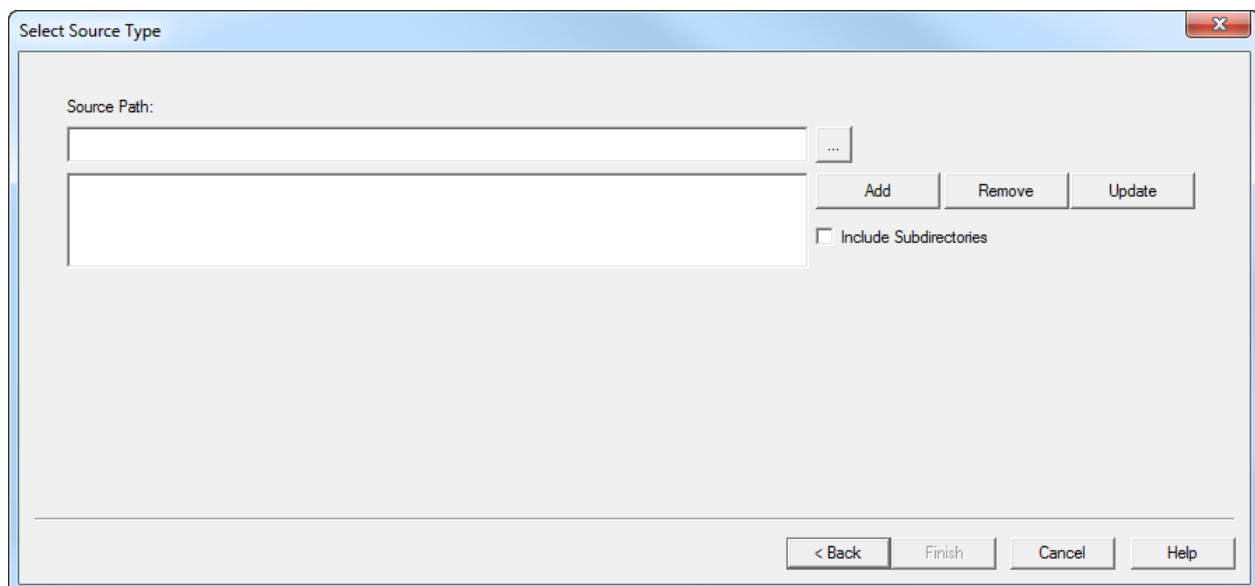



If the source has not been setup, click **Configure Source** to define the source. If the source was already set up, you can create a new project or reset the current source and restart the configuration. For more information, see Work with Project Nodes (page [284](#)).

- 2 Click **Configure Source**. The **Select Source Type** window is displayed.



- 3 Select the **OCR for AnyDoc GTO Files** radio button and click **Next**. The next window requires you to enter the source path for the GTO files.



- 4 Click the **Browse** button  and map to the .GTO source file(s).
- 5 Click **Add** to add the source path to the list of configured paths.
- 6 To remove a source path from the list of configured paths, select the path and click **Remove**.

Sources

- 7 To modify a source path in the list of configured paths, select the path from the list and make any changes to the path in the **Source Path** field. Then click **Update**.
- 8 Select the **Include Subdirectories** check box to include all specified files types in a directory with subdirectories.
- 9 Click **Finish**. The **Source Setup** tab is displayed.



A short delay may occur if there are many .GTO files to process.

Source Mappings for a GTO File

Steps

- 1 Click the **Source Mappings** tab. A table appears listing the available source fields.
- 2 Select the **Key?** check box associated with the genuine key field, if applicable.
If the **Source Options** tab | **Multiple Records Per Image** check box is selected, select the **Key?** check box to append the image file information to each record.
- 3 Select the **Propagate?** check box to propagate the value of a filled field to blank fields below the filled field.
When using OCR for AnyDoc or .GTO files as a source, propagation stops at the end of a batch.
- 4 Select the **Image?** check box to indicate the field that contains the image path.
Only one field can be identified as an image path. Additionally, the image path must be valid to transfer the image.
- 5 Click **View Source** to view the information in the selected source.
If the source was successfully linked to EXCHANGEit, the source content displays. If the source was not successfully linked to EXCHANGEit, no content or the wrong content displays. Re-evaluate the **Source Setup** tab for accuracy if no content displays. Check that the directory and source are correctly mapped. See [Reset Source Nodes](#) (page [286](#)).
If fields in the source file were changed, click **View Source** to update the fields listed in the **Available Fields** column and then click **View Source** to update the content. Any manual changes to the **Key?**, **Propagate?** and **Image?** columns are removed when the fields are refreshed and the default settings are added back to the available fields.
- 6 To view a report of the current mappings, click **Report** and select where the report should be displayed. Options include:
 - **Screen**
The report is displayed on the screen in the **Report** window. Click **Close**.

- **File**

Specify the name and location to save the report and click **Save**. The file is saved as a .TXT file.

- **Printer**

- Specify the print options and click **OK**.

Refresh fields in such instances when fields have been added or deleted, or when the Qualified Field Names or the Control Suffixes (e.g. -BC & -DC) check boxes on the Source Options tab were modified.



Clicking **View Source** causes fields to disappear and work to be lost in the Source Mappings tab if any of the source fields are not in the .GTO file. Click **View Source** only when the .GTO files contain all of the source fields and when the form families and templates used by the .GTO files are available.

Source Desc.	Source Setup	Source Mappings	Source Options	Source Selections	Job Scripts			
	Available Fields	Field Type	Length	Scale	Default Val	Key?	Propagate?	Image?
1	B_NBR_OF_D...	Char	50			<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2	VERSION	Char	50			<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3	1999aim.FName	Char	20			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4	1999aim.MI	Char	1			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5	1999aim.LName	Char	20			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6	1999aim.Compa...	Char	40			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7	1999aim.Addre...	Char	40			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
8	1999aim.City_AC	Char	40			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
9	1999aim.State_...	Char	2			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
10	1999aim.Zip_A...	Char	10			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

B_NBR_OF_DOCS	VERSION	1999aim.FName	1999aim.MI	1999aim.LName	1999aim.Company	1999aim.Address_A1
5	3.1.25	LISA	J	JONES	NEVADA IMAGING SOLUTINS	4227 BURNHAM AVE
5	3.1.25	WILLIAM	J	CLINTON	FEDERAL GOVERNMENT	1600 PENNSYLVANIA AVE NW
5	3.1.25	WILLIAM	H	GATES	MICROSOFT	ONE MICROSOFT WAY
5	3.1.25	JESSE	G	JAMES	WELLS FARGO	36711 JEFFERSON AVE
5	3.1.25	MERIT	L	GREAVES	MTI	3217 W O8ISPO ST

Source Options for a GTO File

Steps

- 1 Click the **Source Options** tab.
- 2 Select the **Process Snippets as Attachments** check box if any of the following

Sources

conditions apply:

- OCR for AnyDoc is configured to work with snippets.
- The destination for this source will be an imaging application.
- The snippets must be stored with the original image.

- 3 Select the **Qualified Field Names** check box to ensure that the information to be moved is associated with a particular template and is selected by default. Template and zone names are included in the output when this check box is enabled.

OR

Clear the **Qualified Field Names** check box to only include the zone names in the output. Use this option to store information from different templates with identical zone names in the same destination field.



If you change the setting of the **Qualified Field Names** check box, return to the **Source Mappings** tab and click the **Refresh Fields** button and then the **View Source** button to view how the new setting changes the source content. Whenever the field names change, always click the **Refresh Fields** button before clicking the **View Source** button to ensure that the content displays in the **Source Mappings** tab.

- 4 Select the **Control Suffixes (e.g. -BC & -DC)** check box to view the complete suffix for the zone name.

The **Control Suffix** is unique to OCR for AnyDoc. For more information, see the *OCR for AnyDoc User Guide*.

If the **Control Suffixes (e.g. -BC & -DC)** check box setting is changed, click **Refresh Fields** on both the **Source** and **Destination Mapping** tabs. This ensures that the changes are made.

- 5 Do one of the following to specify how each image should be processed:

- Select the **Multiple Records Per Image** check box to indicate that each image may have more than one record. The source data is processed per snippet and the records associated with that snippet.

Example:

The source field in each image is an invoice number that was output to a multi-line format. The image file, 54643, contains multiple records: 1, 2, 3 and 4. The invoice numbers are displayed in columns.

54643 1

54643 2

54643 3

54643 4

- Clear the **Multiple Records Per Image** check box to process each image as one record. Field values are concatenated per image or per page for multi-page .TIFs.


Example

The source field in each image is an invoice number that was output to a multi-line format. The image file, 54643, contains multiple records: 1, 2, 3 and 4. Invoice numbers displayed in delimited format. A space is the delimiter.

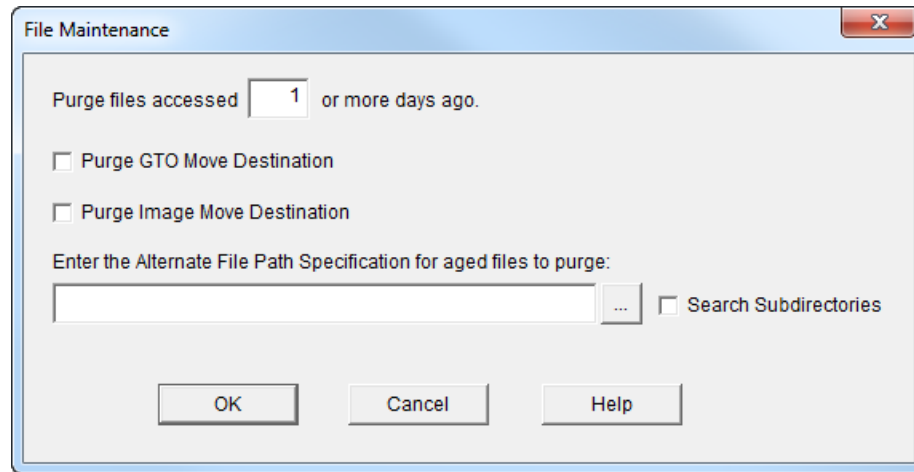
54643 1 2 3 4

- 6 Select the **Process Attachments as Documents** check box if the attachment contains fields and values that you want EXCHANGEit to process in the same manner as processing fields and values in a document. This option allows you to view and map attachment fields.
Any .GTO file that cannot be parsed is moved to a folder within the BAD directory. If a .GTO file destination directory is specified, then the BAD directory is created in the destination directory. If a .GTO file destination directory is not specified, then the BAD directory is created in the .GTO source directory. A folder is created in the BAD directory and named by date to hold the .GTO file that cannot be parsed.
- 7 Select the **Process Total Sets** check box if the .GTO files were generated from Explanation of Benefits (EOB) forms in AnyDoc Software's AnyApp application. This option ensures that the header information in the .GTO files and the total sets are processed.
- 8 If the .GTO file contains EOB sets and the .GTO file was processed in OCR for AnyDoc versions 4.0.3 or lower, select the **Process EOB Sets from OCR 4.0.3 or Lower** check box.
- 9 If the .GTO files were generated from document sets in OCR for AnyDoc, select the **Process OCR for AnyDoc Document Sets** check box.
Records are grouped into sets by their associated template.
- 10 If processing records from a document set, from the **First Template in Document Set** list select one of the following:
 - To automatically identify the first template in the document set based on the page numbers associated with the records in the .GTO files, select **<auto detect>**. By selecting **<auto detect>**, the records are processed in the original order: 1, 2, 3.
 - If the .GTO files were generated from OCR for AnyDoc 3.1.60 or earlier., select the first template that occurs within the document set. Earlier versions do not store page numbers with the record information in the .GTO files. By selecting the first template in the document set, the records are processed in the original order: 1, 2, 3.

Sources

- If it is necessary to change the page order that records are listed in the document set, select which template to consider as the first template in the document set. When records are processed, EXCHANGEit skips any records preceding records associated with the selected template, and then begins ordering records in the document set based on the selected template. Use this option with caution, as it reorders the records and may result in loss of data. By selecting a template other than the first template in the document set, the records are processed in a different order: 2, 3, 1.
- 11 Verify that the **.GTO File Sources** field contains the correct path to the source .GTO file. The path(s) to the .GTO file can also be changed in this field.
 - 12 Multiple GTO source paths can be added to the job by browsing to the path and clicking the **Add** button to add the path to the list. Directory paths can be deleted from the list by selecting the path and clicking the **Remove** button, or modified by selecting the path and clicking the **Update** button.
 - 13 To archive the source file instead of reprocessing it, select the **Move .GTO File After Processing** check box and do the following:
 - a) Enter a valid path in the **.GTO File** field in which to move the source file(s) to after the data is transferred.
-  If the **Move .GTO File After Processing** and the **Include directories check box** is selected, do not set the **.GTO file** to a subfolder within the source directory. Moving the files to the same directory will cause the files to be reprocessed and will result in duplicate data errors.
- b) Specify the **Output Subdirectory Type**.
 - 14 To move document sets and images from the source directory after the data is transferred to the destination, select the **Move Images After Processing** check box and do the following:
 - a) Enter a valid path in the **.GTO File** field in which to move the source file(s) to after the data is transferred.
 - b) Specify the output **Subdirectory Type**.
 - 15 To delete the source folders after the data is transferred to the destination, select the **Delete Source Folder After Processing (if empty)** check box.

- 16 To remove old files that are no longer needed or that have been archived, click **File Maintenance**. The **File Maintenance** window is displayed.




- 17 Do the following:

- a) Enter how many days old the file must be in the **Purge files access ____ or more days ago** field.

The minimum age for files is set at one day. To delete the GTO directory, select the **Purge GTO** Move Destination check box.

- b) To delete the image directory, select the **Purge Image** Move Destination check box.

- c) To specify the directory from which to remove the files, click the **Browse** button, .

- d) Select the **Search Subdirectories** check box to also remove files within the subdirectories of the specified path.

- e) Click **OK**.

After the job is run, all files that meet the specified requirements are deleted.

Source Selections for a GTO File

The Source Selections tab determines which records to transfer from the source to the destination. If VBScript is used it can be accessed from this tab also. For more information, see Use VBScript (page [307](#)).

Steps

- 1 Click the **Source Selections** tab.
- 2 Select one of the following options in the **Type of selection** section:

Sources

- **Select All Records** - all records in the source file are selected.
 - **Select First N records** - the first to the Nth record is selected, where N represents the total number of records to select. Indicate the number of records in the **Total** field.
 - **Range of records** - all records within the specified range are selected. Define the range in the **Start** and **End** fields.
 - **Every Nth record** - only the Nth record is selected, where N represents the multiple at which to select records. Define the Nth number in the **Nth** field and at which record to start the multiple count in the **Start At** field. For example, if the Nth number is 5 and the Start At number is 1, every record that is a multiple of 5 is selected. Therefore, records 5, 10, 15, and 20 are selected.
- 3 To access scripts added to this source, click **Expression**.
The **Expression Builder** window is displayed.
 - 4 In the **Expression Builder** window, click **OK** when complete. Save the .XJB file.

AnyDoc CAPTUREit as a Source

This new source provides a seamless transfer of information from CAPTUREit to any supported destination. EXCHANGEit imports .xml files from the specified CAPTUREit directory. The data is transferred and if the destination supports images, the images are transferred as well.

Source Setup for CAPTUREit

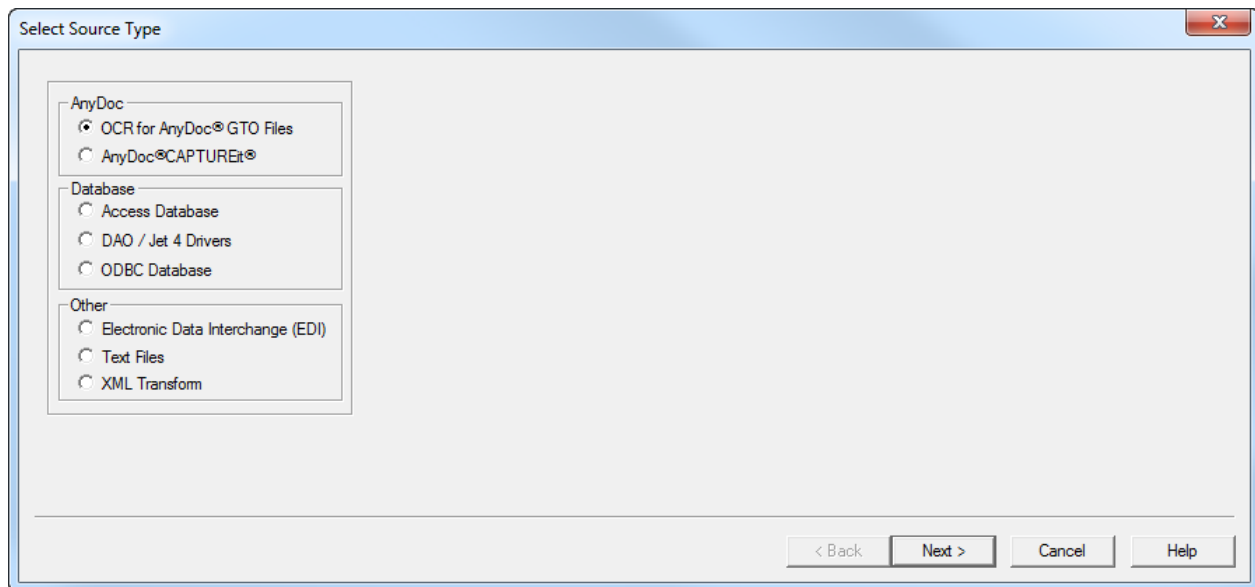
Steps

- 1 Click the **Source Setup** tab.

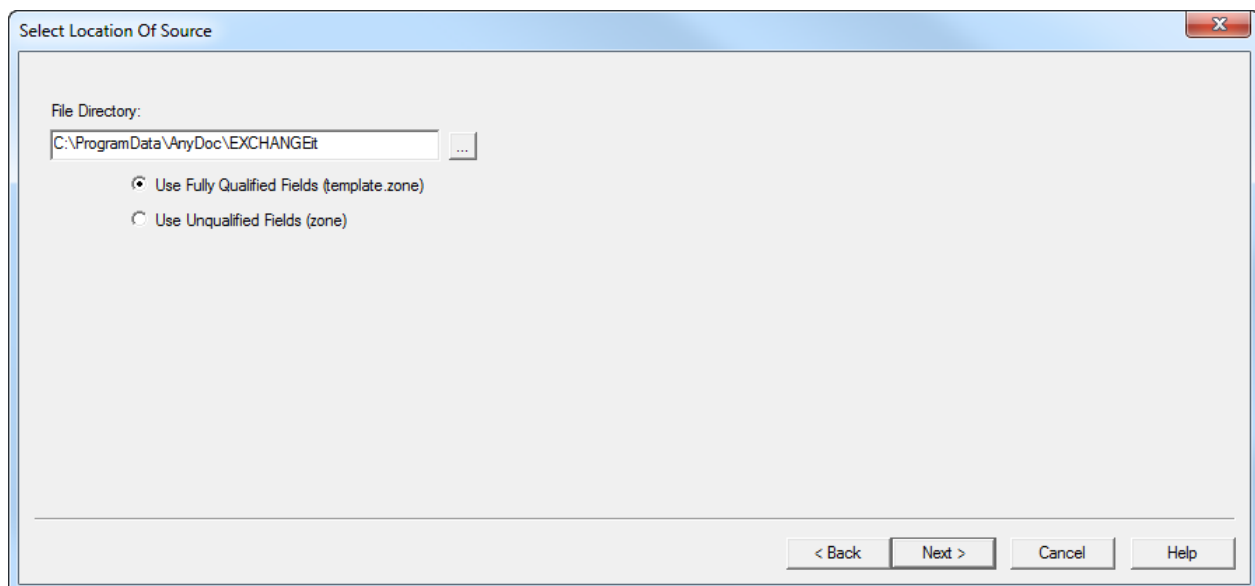



If the source has not been setup, click **Configure Source** to define the source. If the source was already set up, you can create a new project or reset the current source and restart the configuration. For more information, see Work with Project Nodes (page [284](#)).

- 2 Click **Configure Source**. The **Select Source Type** window is displayed.



- 3 Select **AnyDoc CAPTUREit** and click **Next**. The **Select Location of Source** window is displayed.



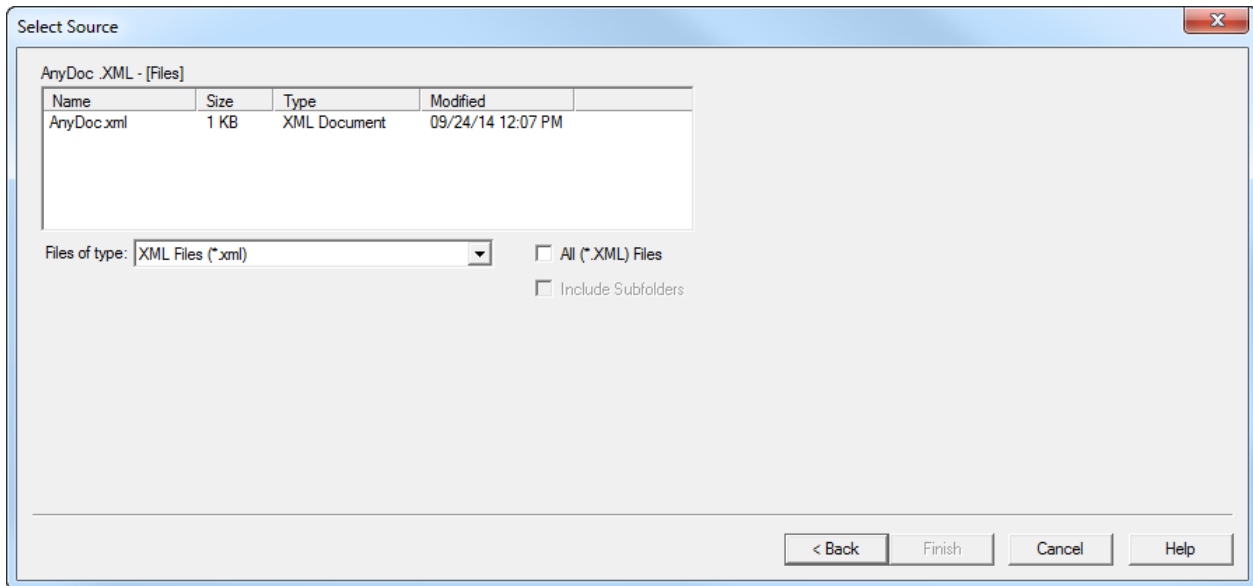
- 4 In the **File Directory** field, click the **Browse** button  to map to the XML source files.
- 5 Specify the type of fields to use by selecting the appropriate radio button:
 - **Use Fully Qualified Fields:** View information showing both template and zone

Sources

names. If several templates contain zones with the same names, use this option to ensure that the information is associated with a particular template.

- **Use Unqualified Fields:** View the information showing only zone names. This option is commonly used in production environments to store information from different templates with identical zone names in the same destination field. The results appear in the Field Name column in the Source Mappings tab. See [Configure Source Mappings for a GTO File](#) (page 40).

- 6 Click **Next**. The **Select Source** window is displayed with a list of XML files in the directory.



- 7 Select one XML source file from the list, or select the **All (*.XML) Files** check box to select all files.
- 8 Select the **Include Subfolders** check box to include all XML files in the directory's subfolders.
- 9 Click **Finish**. A short delay may occur if there are many XML files to process.

Source Mappings for CAPTUREit

Steps

- 1 Click the **Source Mappings** tab. A table appears listing the available source fields.
- 2 Select the **Key?** check box associated with the genuine key field, if applicable.
If the **Source Options** tab | **Multiple Records Per Image** check box is selected, select the **Key?** check box to append the image file information to each record.

- 3 Select the **Propagate?** check box to propagate the value of a filled field to blank fields below the filled field.

When using OCR for AnyDoc or .GTO files as a source, propagation stops at the end of a batch.

- 4 Select the **Image?** check box to indicate the field that contains the image path.

Only one field can be identified as an image path. Additionally, the image path must be valid to transfer the image.

- 5 Click **View Source** to view the information in the selected source.

If the source was successfully linked to EXCHANGEit, the source content displays. If the source was not successfully linked to EXCHANGEit, no content or the wrong content displays. Re-evaluate the **Source Setup** tab for accuracy if no content displays. Check that the directory and source are correctly mapped. See Reset Source Nodes (page [286](#)).

If fields in the source file were changed, click **View Source** to update the fields listed in the **Available Fields** column and then click **View Source** to update the content. Any manual changes to the **Key?**, **Propagate?** and **Image?** columns are removed when the fields are refreshed and the default settings are added back to the available fields.

- 6 To view a report of the current mappings, click **Report** and select where the report should be displayed. Options include:

- **Screen**

The report is displayed on the screen in the **Report** window. Click **Close**.

- **File**

Specify the name and location to save the report and click **Save**. The file is saved as a .TXT file.

- **Printer**

- Specify the print options and click **OK**.

Refresh fields in such instances when fields have been added or deleted, or when the Qualified Field Names or the Control Suffixes check boxes on the Source Options tab were modified.



Clicking **View Source** causes fields to disappear and work to be lost in the Source Mappings tab if any of the source fields are not in the .xml file. Click **View Source** only when the .xml files contain all of the source fields and when the form families and templates used by the .xml files are available.

Source Options for CAPTUREit

Steps

- 1 Click the **Source Options** tab.

- 2 Select the **Qualified Field Names** check box to ensure that the information to be moved is associated with a particular template and is selected by default. Template and zone names are included in the output when this check box is enabled.

OR

Clear the **Qualified Field Names** check box to only include the zone names in the output. Use this option to store information from different templates with identical zone names in the same destination field.



If you change the setting of the **Qualified Field Names** check box, return to the **Source Mappings** tab and click the **Refresh Fields** button and then the **View Source** button to view how the new setting changes the source content. Whenever the field names change, always click the **Refresh Fields** button before clicking the **View Source** button to ensure that the content displays in the **Source Mappings** tab.

- 3 Select the **Control Suffixes (e.g. -BC & -DC)** check box to view the complete suffix for the zone name.

The Control Suffix is unique to CAPTUREit. For more information, see the *CAPTUREit User Guide*.

If the **Control Suffixes (e.g. -BC & -DC)** check box setting is changed, click **Refresh Fields** on both the **Source** and **Destination Mapping** tabs. This ensures that the changes are made.

- 4 Do one of the following to specify how each image should be processed:
 - Select the **Multiple Records Per Image** check box to indicate that each image may have more than one record. The source data is processed per snippet and the records associated with that snippet.

Example:

The source field in each image is an invoice number that was output to a multi-line format. The image file, 54643, contains multiple records: 1, 2, 3 and 4. The invoice numbers are displayed in columns.

54643 1

54643 2

54643 3

54643 4

- Clear the **Multiple Records Per Image** check box to process each image as one record. Field values are concatenated per image or per page for multi-page .TIFs.

Example

The source field in each image is an invoice number that was output to a multi-line format. The image file, 54643, contains multiple records: 1, 2, 3 and 4. Invoice numbers displayed in delimited format. A space is the delimiter.

54643 1 2 3 4

- 5 Select the **Process Attachments as Documents** check box if the attachment contains fields and values that you want EXCHANGEit to process in the same manner as processing fields and values in a document. This option allows you to view and map attachment fields.
Any XML file that cannot be parsed is moved to a folder within the BAD directory. If a XML file destination directory is specified, then the BAD directory is created in the destination directory. If a XML file destination directory is not specified, then the BAD directory is created in the XML source directory. A folder is created in the BAD directory and named by date to hold the XML file that cannot be parsed.
- 6 Select the **Process Total Sets** check box if the XML files were generated from Explanation of Benefits (EOB) forms in the AnyDoc Software AnyApp application. This option ensures that the header information in the XML files and the total sets are processed.
- 7 If the XML file contains EOB sets and the XML file was processed in OCR for AnyDoc versions 4.0.3 or lower, select the **Process EOB Sets from OCR 4.0.3 or**

Sources

Lower check box .

- 8 If the XML files were generated from document sets in OCR for AnyDoc, select the **Process OCR for AnyDoc Document Sets** check box.

Records are grouped into sets by their associated template.

- 9 If processing records from a document set, from the **First Template in Document Set** list select one of the following:

- To automatically identify the first template in the document set based on the page numbers associated with the records in the .GTO files, select **<auto detect>**. By selecting **<auto detect>**, the records are processed in the original order: 1, 2, 3.
- If the .GTO files were generated from OCR for AnyDoc 3.1.60 or earlier., select the first template that occurs within the document set. Earlier versions do not store page numbers with the record information in the .GTO files. By selecting the first template in the document set, the records are processed in the original order: 1, 2, 3.

If it is necessary to change the page order that records are listed in the document set, select which template to consider as the first template in the document set. When records are processed, EXCHANGEit skips any records preceding records associated with the selected template, and then begins ordering records in the document set based on the selected template. Use this option with caution, as it reorders the records and may result in loss of data. By selecting a template other than the first template in the document set, the records are processed in a different order: 2, 3, 1.

Based on the selected settings, view the way in which records in the source are ordered by clicking the **Source Mappings** tab | **View Source** button.

- 10 Verify that the XML **File Source** field contains the correct path to the source XML file. The path to the XML file can also be changed in this field.

- 11 To archive the source file instead of reprocessing it, select the **Move .XML File After Processing** check box and do the following:

- a) Enter a valid path in the **.XML File** field in which to move the source file(s) to after the data is transferred.



If the **Move .XML File After Processing** and the **Include directories check box** is selected, do not set the **.XML file** to a subfolder within the source directory. Moving the files to the same directory will cause the files to be reprocessed and will result in duplicate data errors.

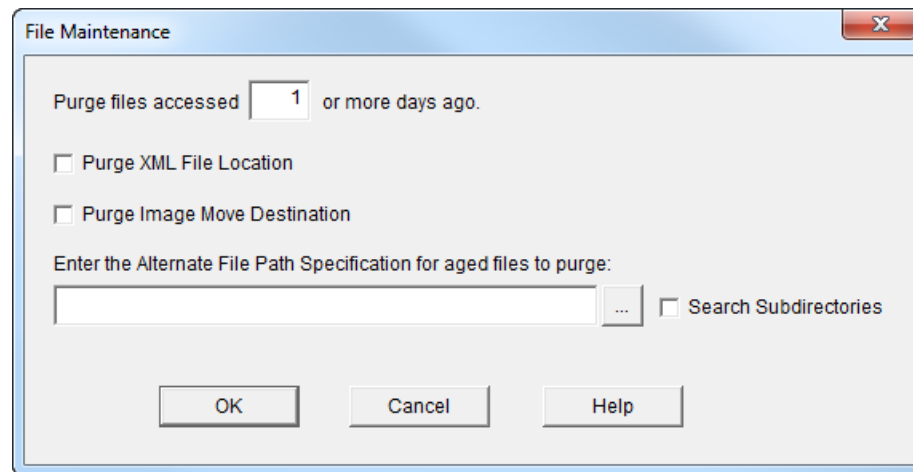
- b) Specify the **Output Subdirectory Type**.


- 12 To move document sets and images from the source directory after the data is transferred to the destination, select the **Move Images After Processing** check box

and do the following:

- a) Enter a valid path in the **.XML File** field in which to move the source file(s) to after the data is transferred.
 - b) Specify the **Output Subdirectory Type**.
- 13** To remove old files that are no longer needed or that have been archived, click **File Maintenance**.

The **File Maintenance** window is displayed.



- 14** Do the following:
- a) To delete the XML directory, select the **Purge XML Location** check box.
 - b) To delete the image directory, select the **Purge Image Location** check box.
 - c) To specify a directory to purge files older than the specified number of days, click the **Browse** button  and map to the directory from which to remove the files.
 - d) Enter how many days old the file must be in the **Purge files access ___ or more days ago** field.
The minimum age for files is set at one day.
 - e) Select the **Search Subdirectories** check box to also remove files within the subdirectories of the specified path.
 - f) Click **OK**.

After the job is run, all files that meet the specified requirements are deleted.

Source Selections for CAPTUREit

The Source Selections tab determines which records to transfer from the source to the destination. If VBScript is used it can be accessed from this tab also. For more information, see Use VBScript (page [307](#)).

Steps

- 1 Click the **Source Selections** tab.
- 2 Select one of the following options in the **Type of selection** section:
 - **Select All Records** - all records in the source file are selected.
 - **Select First N records** - the first to the Nth record is selected, where N represents the total number of records to select. Indicate the number of records in the **Total** field.
 - **Range of records** - all records within the specified range are selected. Define the range in the **Start** and **End** fields.
 - **Every Nth record** - only the Nth record is selected, where N represents the multiple at which to select records. Define the Nth number in the **Nth** field and at which record to start the multiple count in the **Start At** field. For example, if the Nth number is 5 and the Start At number is 1, every record that is a multiple of 5 is selected. Therefore, records 5, 10, 15, and 20 are selected.
- 3 To access scripts added to this source, click **Expression**.
The **Expression Builder** window is displayed.
- 4 In the **Expression Builder** window, click **OK** when complete. Save the .XJB file.

Access Database as a Source

A common source used with EXCHANGEit is the Microsoft® Access® database. Configure an Access database using the Access Database (.MDB) source type.

The ODBC Database source type can also be used to configure an Access database and provides more flexibility than the Access Database (.MDB) source type. For more information, see ODBC Database as a Source (page [66](#)).

Source Setup for an Access Database

Steps

- 1 Click the **Source Setup** tab.



If the source has not been setup, click **Configure Source** to define the source. If the source was already set up, you can create a new project or reset the current source and restart the configuration. For more information, see [Work with Project Nodes](#) (page [284](#)).

- Click **Configure Source**. The **Select Source Type** window is displayed.

Select Source Type

AnyDoc

- ☒ OCR for AnyDoc® GTO Files
- ☐ AnyDoc®CAPTUREit®

Database

- ☐ Access Database
- ☐ DAO / Jet 4 Drivers
- ☐ ODBC Database

Other

- ☐ Electronic Data Interchange (EDI)
- ☐ Text Files
- ☐ XML Transform

< Back Next > Cancel Help


- Select **Access Database**, then select either **Access 2003** or **Access 2007**, and click **Next**. The **Select Location Of Source** window is displayed.

Select Location Of Source

Access 2007

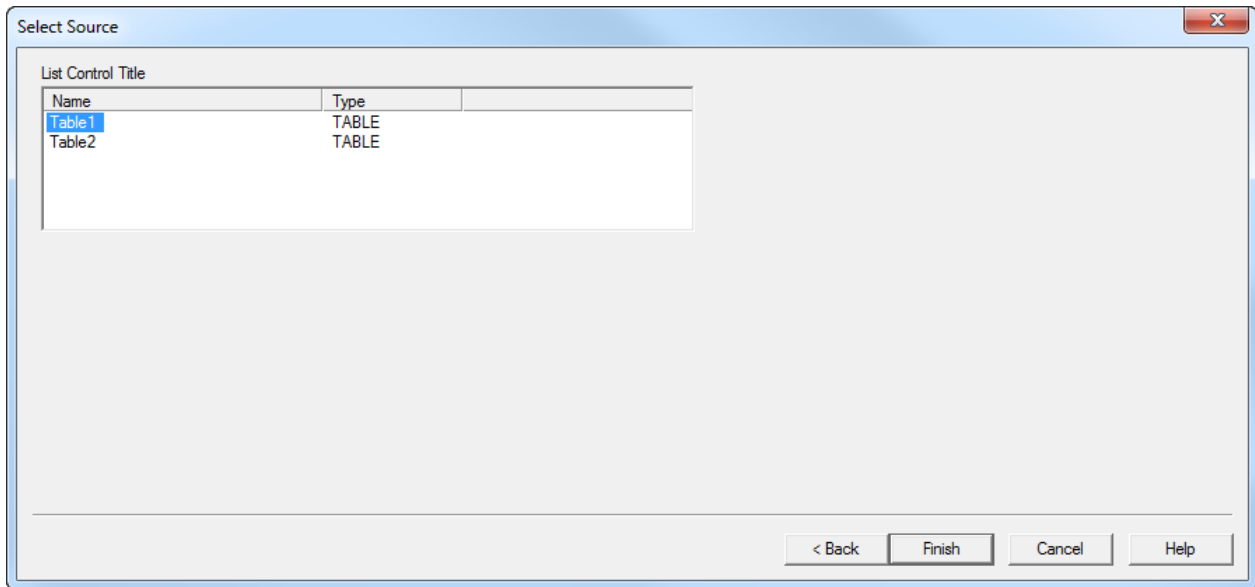
C:\ProgramData\AnyDoc\EXCHANGEit\EITdatabase.acc ...

< Back Next > Cancel Help

- Click the **Browse** button  and map to the Access database.

Sources

- 5 Click **Next**. The **Select Source** window is displayed.



- 6 Select the table to use as a source and click **Finish**. The **Source Setup** tab is displayed.

Source Mappings for an Access Database

Steps

- 1 Click the **Source Mappings** tab. A table appears listing the available source fields.
- 2 Select the **Key?** check box associated with the genuine key field, if applicable.
If the **Source Options** tab | **Multiple Records Per Image** check box is selected, select the **Key?** check box to append the image file information to each record.
- 3 Select the **Propagate?** check box to propagate the value of a filled field to blank fields below the filled field.
When using OCR for AnyDoc or .GTO files as a source, propagation stops at the end of a batch.
- 4 Select the **Image?** check box to indicate the field that contains the image path.
Only one field can be identified as an image path. Additionally, the image path must be valid to transfer the image.
- 5 Click **View Source** to view the information in the selected source.

If the source was successfully linked to EXCHANGEit, the source content displays. If the source was not successfully linked to EXCHANGEit, no content or the wrong content displays. Re-evaluate the **Source Setup** tab for accuracy if no content displays. Check that the directory and source are correctly mapped. See Reset Source Nodes (page [286](#)).

If fields in the source file were changed, click **View Source** to update the fields listed in the **Available Fields** column and then click **View Source** to update the content. Any manual changes to the **Key?**, **Propagate?** and **Image?** columns are removed when the fields are refreshed and the default settings are added back to the available fields.

- 6 To view a report of the current mappings, click **Report** and select where the report should be displayed. Options include:

- **Screen**

The report is displayed on the screen in the **Report** window. Click **Close**.

- **File**

Specify the name and location to save the report and click **Save**. The file is saved as a .TXT file.

- **Printer**

Sources

- Specify the print options and click **OK**.


Source Desc.	Source Setup	Source Mappings	Source Options	Source Selections				
	Available Fields	Field Type	Length	Scale	Default Val	Key?	Propagate?	Image?
1	Users.IBUserID	Integer	4	0		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2	Users.UserName	Char	255			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3	Users.UserName	Char	255			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4	Users.FullName	Char	255			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5	Users.UserDesc	Char	255			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6	Users.LastAcce...	Date	8	0		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7	Users.nUserAtt...	Integer	4	0		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
8	Users.WinDom...	Char	255			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Refresh Source Refresh Fields

Users.IBUserID	Users.UserName	Users.UserPassword	Users.FullName	Users.UserDesc	Users.Last...
1	Admin	011501901001790	Master Administrator	Master Database Administr...	2/21/2005
2	Benton	0123546789456	Mary Benton	Licensing Coordinator	3/15/2005
3	Green	1245897456697	Tom Green	Sales Associate	6/5/2005
4	Weir	1245747852369	Marc Weir	Account Manager	7/31/2005
5	Wilson	4578945661311	Tina Wilson	Engineer	8/26/2005
6	Stanton	4567894521321	John Stanton	Director of Services	8/26/2005
7	Hastings	1245789432132	Maxwell Hastings	Account Manager	3/31/2005
8	Strickland	1234568798411	Bill Strickland	Sales Associate	3/15/2005
9	Franklin	45879684132156	Vanessa Franklin	Operations Coordinator	2/22/2005
10	Vindi	12324568789813	Choe Vindi	Engineer	1/31/2005
11	Arevalo	4555548798446	Maria Arevalo	Customer Support Specialist	1/17/2005
12	Drexler	4569812223385	Jack Drexler	Marketing Associate	7/15/2005
13	Ramirez	2135468798777	Jose Ramirez	Marketing Coordinator	3/4/2005
14	Anderson	123524165465874	Keith Anderson	Public Relations Coordinator	11/26/2005

Source Options for an Access Database

Option	Description
DB Path	Displays the database being linked to. To change the database, click Change and select another database. The new database must contain the same tables as the previous database. If the database contains the same fields, the mappings are retained.

Option	Description
Delete Record From Source After Destination Is Updated	<p>Select this check box to delete the record from the source directory after the source is transferred to the destination.</p> <div>  <p>The record is permanently deleted and cannot be retrieved.</p> </div>

Source Selections for an Access Database

The Source Selections tab determines which records to transfer from the source to the destination. If VBScript is used it can be accessed from this tab also. For more information, see Use VBScript (page [307](#)).

Steps

- 1 Click the **Source Selections** tab.
- 2 Select one of the following options in the **Type of selection** section:
 - **Select All Records** - all records in the source file are selected.
 - **Select First N records** - the first to the Nth record is selected, where N represents the total number of records to select. Indicate the number of records in the **Total** field.
 - **Range of records** - all records within the specified range are selected. Define the range in the **Start** and **End** fields.
 - **Every Nth record** - only the Nth record is selected, where N represents the multiple at which to select records. Define the Nth number in the **Nth** field and at which record to start the multiple count in the **Start At** field. For example, if the Nth number is 5 and the Start At number is 1, every record that is a multiple of 5 is selected. Therefore, records 5, 10, 15, and 20 are selected.
- 3 To access scripts added to this source, click **Expression**.
The **Expression Builder** window is displayed.
- 4 In the **Expression Builder** window, click **OK** when complete. Save the .XJB file.

DAO Database/Jet 4 Drivers as a Source

A Data Access Objects (DAO) database consists of a library of objects with their associated properties and methods that make it easier to access a relational database.

Sources

Source Setup for a DAO Database

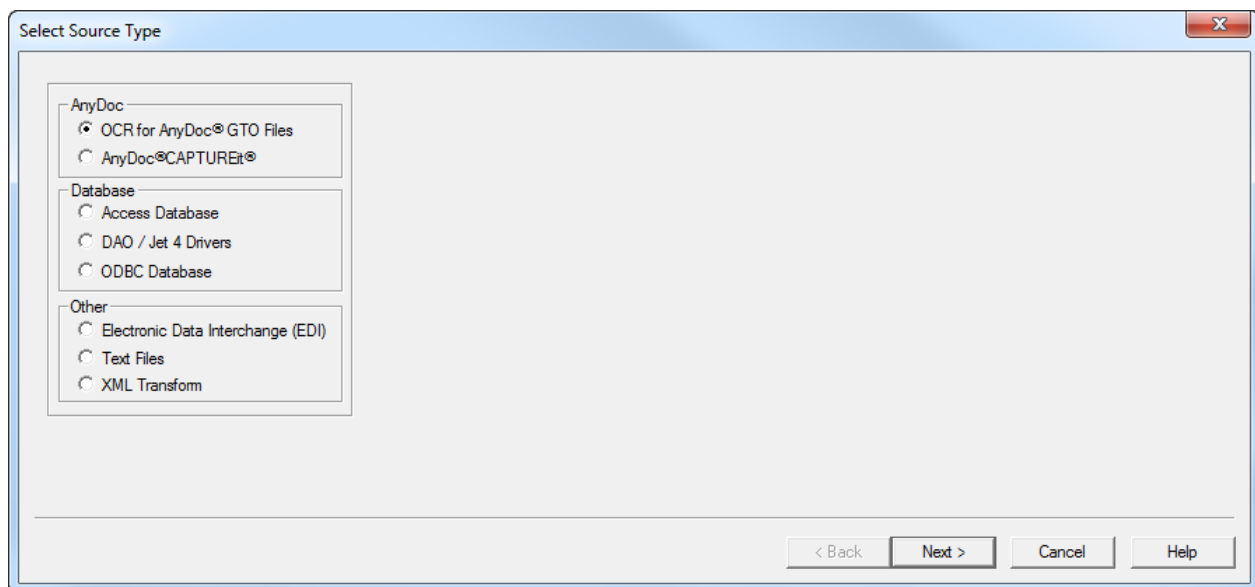
Steps

- 1 Click the **Source Setup** tab.

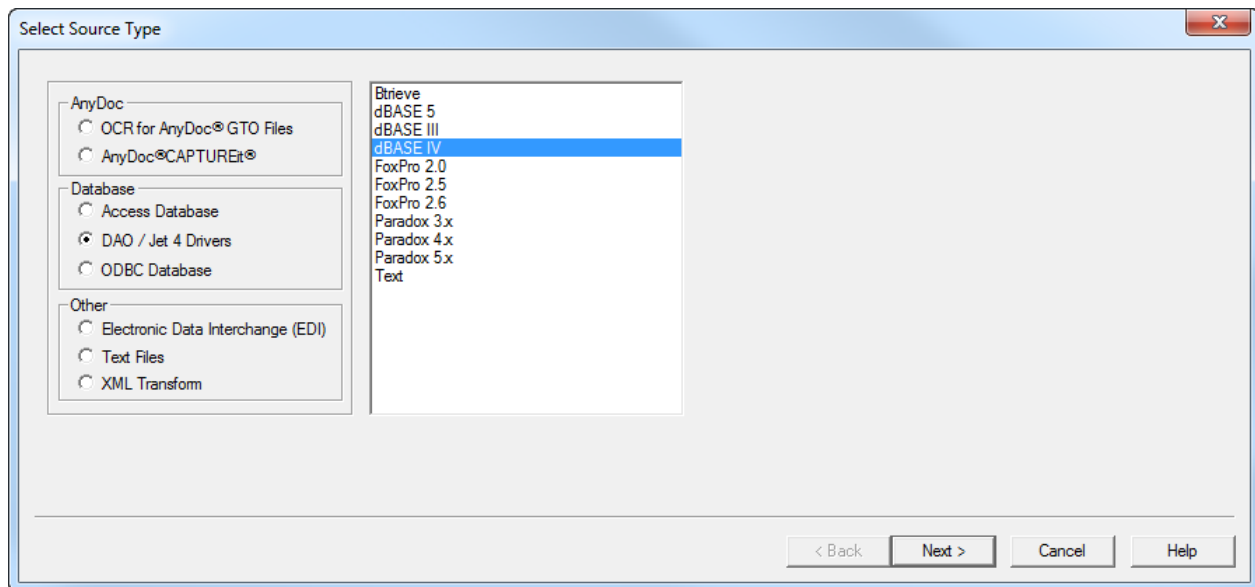


If the source has not been setup, click **Configure Source** to define the source. If the source was already set up, you can create a new project or reset the current source and restart the configuration. For more information, see [Work with Project Nodes](#) (page [284](#)).

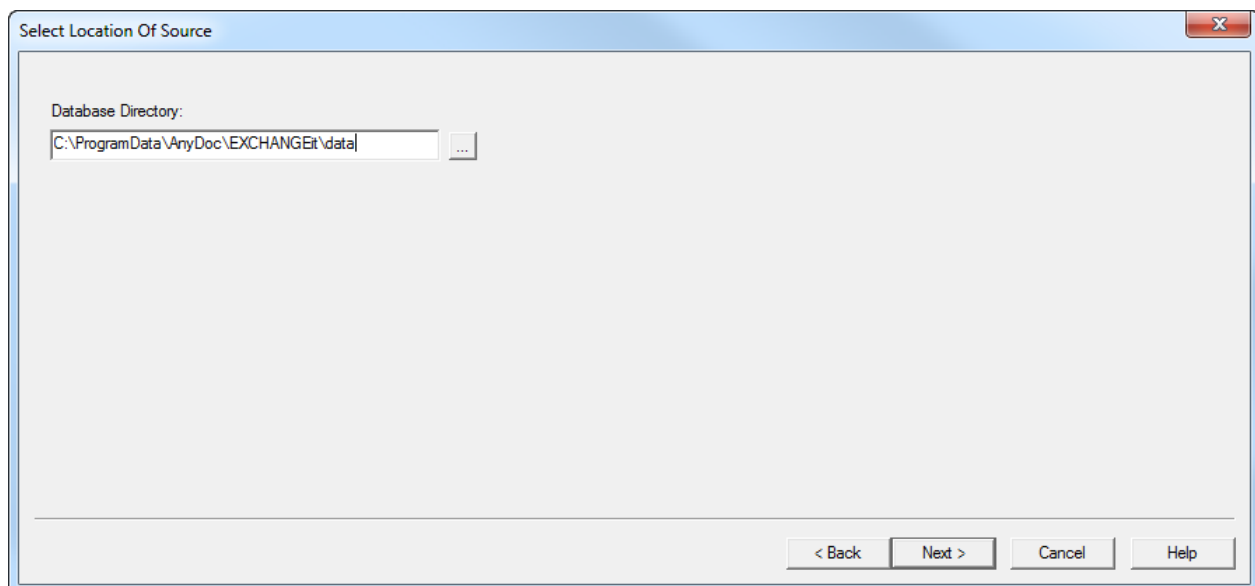
- 2 Click **Configure Source**. The **Select Source Type** window is displayed.




- 3 Select **DAO / Jet 4 Drivers**. A list of data types is displayed in the window.



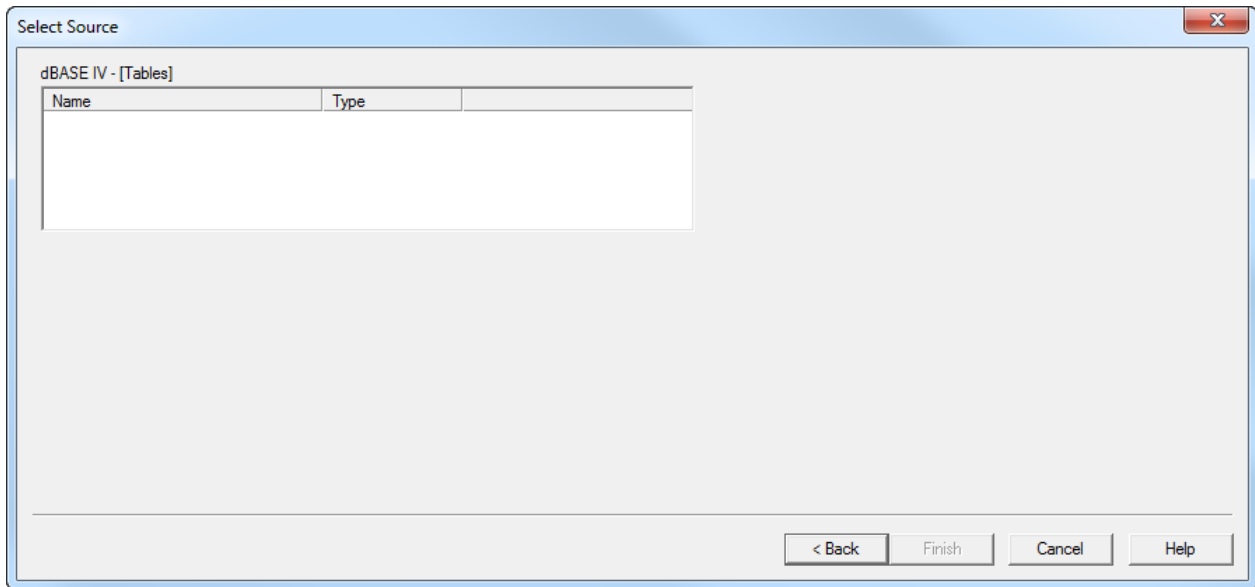
- 4 Select the source file application to use and click **Next**. The **Select Location Of Source** window is displayed.



- 5 Click the **Browse** button  and map to the DAO database directory.

Sources

- 6 Click **Next**. The **Select Source** window is displayed.



- 7 Select the table to use as a source and click **Finish**. The **Source Setup** tab appears.

Source Mappings for a DAO Database

Steps

- 1 Click the **Source Mappings** tab. A table appears listing the available source fields.
- 2 Select the **Key?** check box associated with the genuine key field, if applicable.
If the **Source Options** tab | **Multiple Records Per Image** check box is selected, select the **Key?** check box to append the image file information to each record.
- 3 Select the **Propagate?** check box to propagate the value of a filled field to blank fields below the filled field.
When using OCR for AnyDoc or .GTO files as a source, propagation stops at the end of a batch.
- 4 Select the **Image?** check box to indicate the field that contains the image path.
Only one field can be identified as an image path. Additionally, the image path must be valid to transfer the image.
- 5 Click **View Source** to view the information in the selected source.

If the source was successfully linked to EXCHANGEit, the source content displays. If the source was not successfully linked to EXCHANGEit, no content or the wrong content displays. Re-evaluate the **Source Setup** tab for accuracy if no content displays. Check that the directory and source are correctly mapped. See Reset Source Nodes (page [286](#)).

If fields in the source file were changed, click **View Source** to update the fields listed in the **Available Fields** column and then click **View Source** to update the content. Any manual changes to the **Key?**, **Propagate?** and **Image?** columns are removed when the fields are refreshed and the default settings are added back to the available fields.

- 6 To view a report of the current mappings, click **Report** and select where the report should be displayed. Options include:

- **Screen**

The report is displayed on the screen in the **Report** window. Click **Close**.

- **File**

Specify the name and location to save the report and click **Save**. The file is saved as a .TXT file.

- **Printer**

Sources

- Specify the print options and click **OK**.

Source Desc.		Source Setup		Source Mappings		Source Options		Source Selections	
	Available Fields	Field Type	Length	Scale	Default Val	Key?	Propagate?		
1	00000243#txt.tes...	Char	255			<input type="checkbox"/>	<input type="checkbox"/>		
2	00000243#txt.Ry...	Char	255			<input type="checkbox"/>	<input type="checkbox"/>		
3	00000243#txt.2313	Char	255			<input type="checkbox"/>	<input type="checkbox"/>		
4	00000243#txt.No...	Char	255			<input type="checkbox"/>	<input type="checkbox"/>		
5	00000243#txt.F5	Char	255			<input type="checkbox"/>	<input type="checkbox"/>		
6	00000243#txt.F6	Char	255			<input type="checkbox"/>	<input type="checkbox"/>		
7	00000243#txt.F7	Char	255			<input type="checkbox"/>	<input type="checkbox"/>		
8	00000243#txt.F8	Char	255			<input type="checkbox"/>	<input type="checkbox"/>		
9	00000243#txt.F9	Char	255			<input type="checkbox"/>	<input type="checkbox"/>		
10	00000243#txt.F10	Char	255			<input type="checkbox"/>	<input type="checkbox"/>		

Refresh Source Refresh Fields

00000243#txt.F5	00000243#txt.F6	00000243#txt.F7	00000243#txt.F8	00000243#txt.F10	00000243#txt.F11
BOB	M	JONES	4822 LONESOME DOVE CT	PLANT CITY	FL
STEVE	S	SMITH	3303 N LAKEVIEW DR	TAMPA	FL
SHIELA	W	WAYNE	2907 YBOR ST	TAMPA	FL
GARY	D	LAWSON	9615 EDISON RD	LITHIA	FL
JAMES	C	RANDY	201 SE 12TH ST	FORT LAUDERDALE	FL
BOB	M	JONES	4822 LONESOME DOVE CT	PLANT CITY	FL
STEVE	S	SMITH	3303 N LAKEVIEW DR	TAMPA	FL
SHIELA	W	WAYNE	2907 YBOR ST	TAMPA	FL
GARY	D	LAWSON	9615 EDISON RD	LITHIA	FL
JAMES	C	RANDY	201 SE 12TH ST	FORT LAUDERDALE	FL

Source Options for a DAO Database

An option to delete the source record from the source directory after the source is transferred to the destination is provided in the **Source Options** tab.



Enabling this option deletes the record permanently, and it cannot be retrieved.

Steps

- 1 Click the **Source Options** tab.

The screenshot shows a window with several tabs: 'Source Desc.', 'Source Setup', 'Source Mappings', 'Source Options' (which is the active tab), 'Source Selections', and 'Job Scripts'. The 'Source Options' tab is selected. Inside this tab, there is a checkbox labeled 'Delete Record After Destination Is Updated' and a 'Help' button.

- 2 To delete the record from the source directory after the source is transferred to the destination, select the **Delete Record After Destination Is Updated** check box.

Source Selections for a DAO Database

The Source Selections tab determines which records to transfer from the source to the destination. If VBScript is used it can be accessed from this tab also. For more information, see Use VBScript (page [307](#)).

Steps

- 1 Click the **Source Selections** tab.
- 2 Select one of the following options in the **Type of selection** section:
 - **Select All Records** - all records in the source file are selected.
 - **Select First N records** - the first to the Nth record is selected, where N represents the total number of records to select. Indicate the number of records in the **Total** field.
 - **Range of records** - all records within the specified range are selected. Define the range in the **Start** and **End** fields.
 - **Every Nth record** - only the Nth record is selected, where N represents the multiple at which to select records. Define the Nth number in the **Nth** field and at which record to start the multiple count in the **Start At** field. For example, if the Nth number is 5 and the Start At number is 1, every record that is a multiple of 5 is selected. Therefore, records 5, 10, 15, and 20 are selected.
- 3 To access scripts added to this source, click **Expression**.

Sources

The **Expression Builder** window is displayed.

- 4 In the **Expression Builder** window, click **OK** when complete. Save the .XJB file.

ODBC Database as a Source

Open Data Base Connectivity (ODBC) is a method of accessing and manipulating data via structured query language (SQL) in relational database management systems (RDMS), such as Access, Microsoft SQL Server, Oracle or dBase.

Source Setup for an ODBC Database

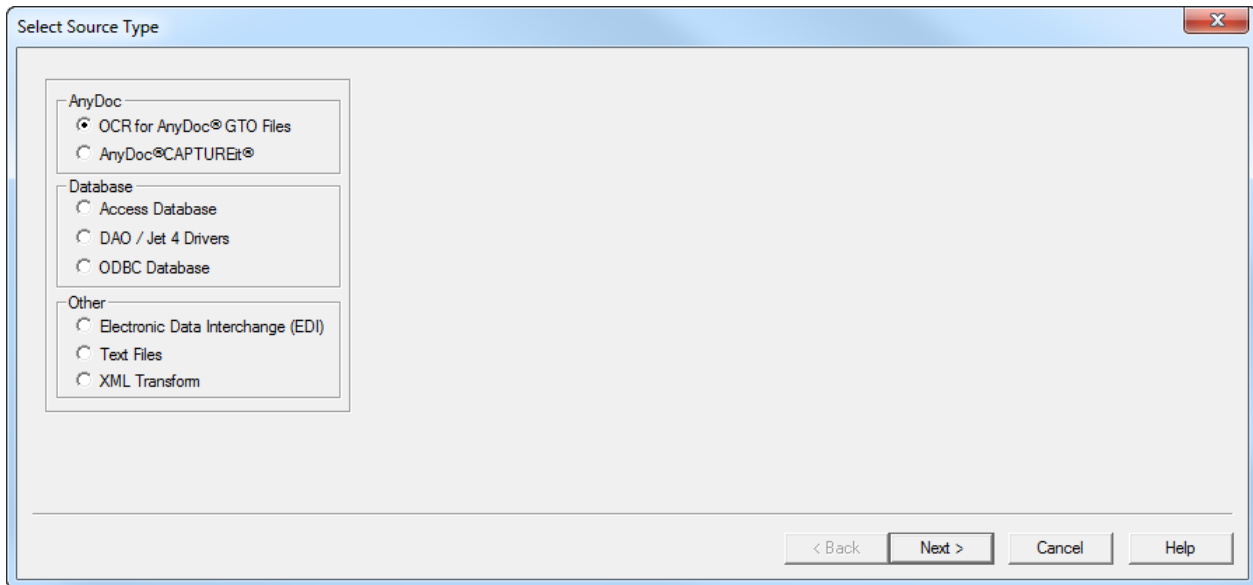
Steps

- 1 Click the **Source Setup** tab.

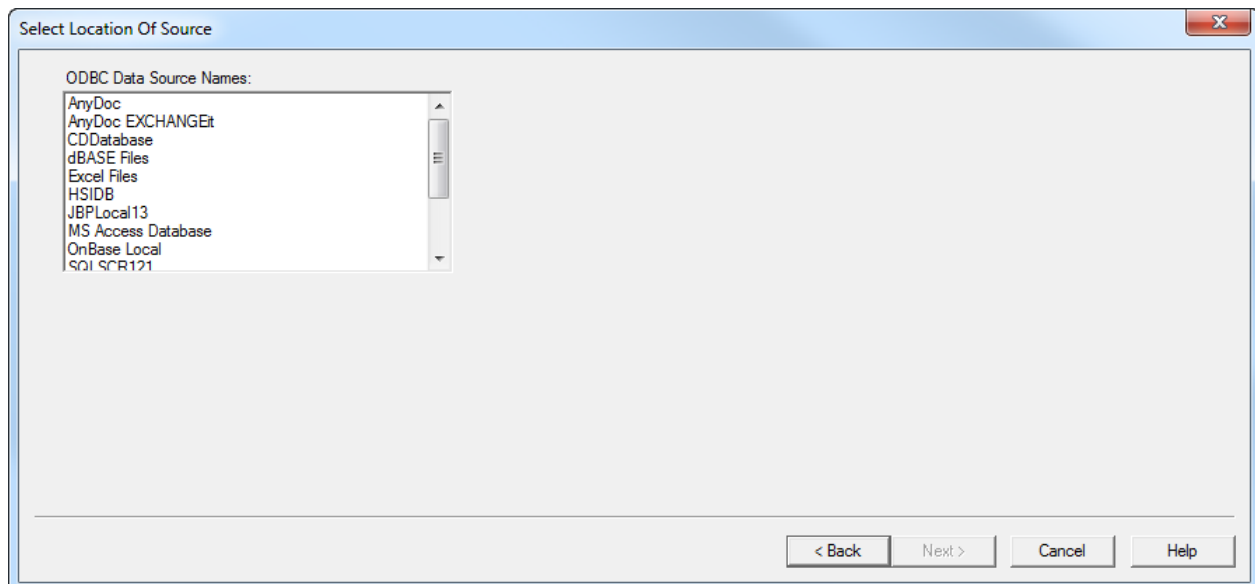


If the source has not been setup, click **Configure Source** to define the source. If the source was already set up, you can create a new project or reset the current source and restart the configuration. For more information, see [Work with Project Nodes](#) (page [284](#)).

- 2 Click **Configure Source**. The **Select Source Type** window is displayed.



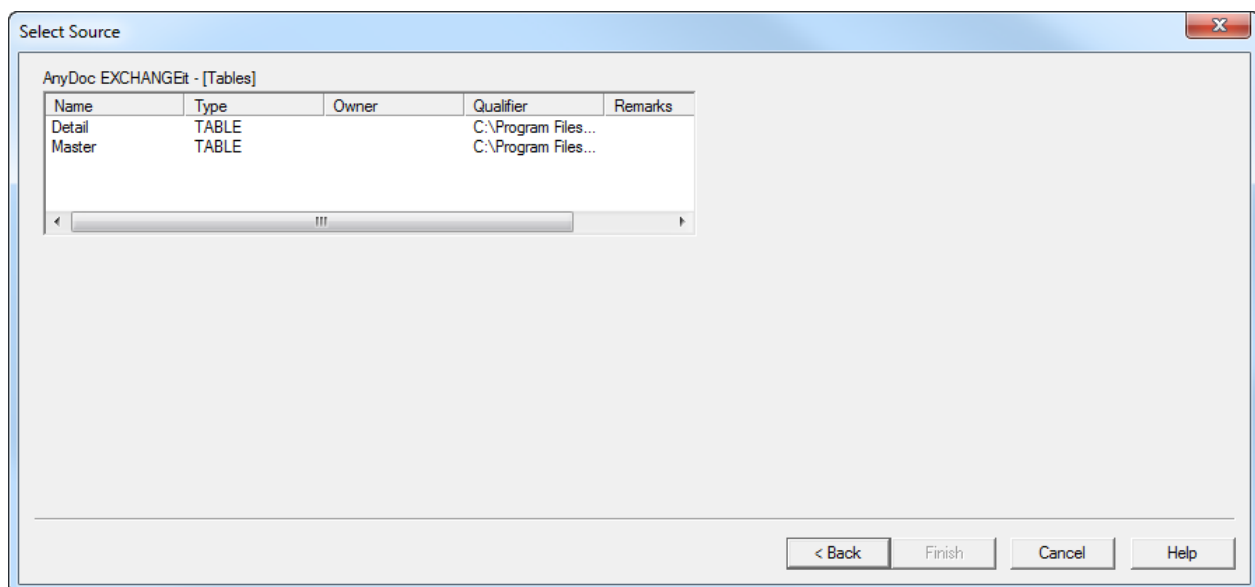
- 3 Select **ODBC Database** and click **Next**. The **Select Location Of Source** window is displayed.



- 4 Select a data source from the **ODBC Data Source Names** list and click **Next**. The **Select Source** window is displayed.



Depending on the source location, it may be necessary to first select a workbook or database before selecting a source. Or, if Visual FoxPro Database or Tables was selected, you must first configure the connection to the database.



Sources

- 5 Select the table to use as a source and click **Finish**. The **Source Setup** tab is displayed.

Source Mappings for an ODBC Database

Steps

- 1 Click the **Source Mappings** tab. A table appears listing the available source fields.
- 2 Select the **Key?** check box associated with the genuine key field, if applicable.
If the **Source Options** tab | **Multiple Records Per Image** check box is selected, select the **Key?** check box to append the image file information to each record.
- 3 Select the **Propagate?** check box to propagate the value of a filled field to blank fields below the filled field.
When using OCR for AnyDoc or .GTO files as a source, propagation stops at the end of a batch.
- 4 Select the **Image?** check box to indicate the field that contains the image path.
Only one field can be identified as an image path. Additionally, the image path must be valid to transfer the image.
- 5 Click **View Source** to view the information in the selected source.
If the source was successfully linked to EXCHANGEit, the source content displays.
If the source was not successfully linked to EXCHANGEit, no content or the wrong content displays. Re-evaluate the **Source Setup** tab for accuracy if no content displays. Check that the directory and source are correctly mapped. See Reset Source Nodes (page [286](#)).
If fields in the source file were changed, click **View Source** to update the fields listed in the **Available Fields** column and then click **View Source** to update the content. Any manual changes to the **Key?**, **Propagate?** and **Image?** columns are removed when the fields are refreshed and the default settings are added back to the available fields.
- 6 To view a report of the current mappings, click **Report** and select where the report should be displayed. Options include:
 - **Screen**
The report is displayed on the screen in the **Report** window. Click **Close**.
 - **File**
Specify the name and location to save the report and click **Save**. The file is saved as a .TXT file.
 - **Printer**

- Specify the print options and click **OK**.

	Available Fields	Field Type	Length	Scale	Default Val	Key?	Propagate?
1	users.IBUserID	Integer	10	0		<input type="checkbox"/>	<input type="checkbox"/>
2	users.UserName	Char	255			<input type="checkbox"/>	<input type="checkbox"/>
3	users.UsrPassw...	Char	255			<input type="checkbox"/>	<input type="checkbox"/>
4	users.FullName	Char	255			<input type="checkbox"/>	<input type="checkbox"/>
5	users.UserDesc	Char	255			<input type="checkbox"/>	<input type="checkbox"/>
6	users.LastAccess	Timestamp	19	0		<input type="checkbox"/>	<input type="checkbox"/>
7	users.nUserAttr...	Integer	10	0		<input type="checkbox"/>	<input type="checkbox"/>
8	users.WinDomain	Char	255			<input type="checkbox"/>	<input type="checkbox"/>


Refresh Source Refresh Fields

users.UserName	users.UsrPassword	users.FullName	users.UserDesc	users.LastAccess
Admin	011501901001790	Master Administrator	Master Database Administrator	2005-02-21 00:00:00
Benton	0123546789456	Mary Benton	Licensing Coordinator	2005-03-15 00:00:00
Green	1245897456697	Tom Green	Sales Associate	2005-06-05 00:00:00
Weir	1245747852369	Marc Weir	Account Manager	2005-07-31 00:00:00
Wilson	4578945661311	Tina Wilson	Engineer	2005-08-26 00:00:00
Stanton	4567894521321	John Stanton	Director of Services	2005-08-26 00:00:00
Hastings	1245789432132	Maxwell Hastings	Account Manager	2005-03-31 00:00:00
Strickland	1234568798411	Bill Strickland	Sales Associate	2005-03-15 00:00:00
Franklin	45879684132156	Vanessa Franklin	Operations Coordinator	2005-02-22 00:00:00
Vindi	12324568789813	Choe Vindi	Engineer	2005-01-31 00:00:00
Arevalo	4555548798446	Maria Arevalo	Customer Support Specialist	2005-01-17 00:00:00
Drexler	4569812223385	Jack Drexler	Marketing Associate	2005-07-15 00:00:00
Ramirez	2135468798777	Jose Ramirez	Marketing Coordinator	2005-03-04 00:00:00
Anderson	123524165465874	Keith Anderson	Public Relations Coordinator	2004-11-26 00:00:00

Source Options for an ODBC Database

Option	Description
DSN	<p>Displays the database being linked to. To change the database, click Change and select the correct database.</p> <p>If the database contains the same fields, the mappings will be retained.</p>

Sources

Option	Description
User ID	The User ID used to log into the database.
Password	The password used to log into the database.
No Password	Select this check box if a password is not required.
Delete Record From Source After Destination Is Updated	<p>Select this check box to delete the record from the source directory after the source is transferred to the destination.</p> <div>  <p>The record is permanently deleted and cannot be retrieved.</p> </div>

Source Selections for an ODBC Database

The Source Selections tab determines which records to transfer from the source to the destination. If VBScript is used it can be accessed from this tab also. For more information, see Use VBScript (page [307](#)).

Steps

- 1 Click the **Source Selections** tab.
- 2 Select one of the following options in the **Type of selection** section:
 - **Select All Records** - all records in the source file are selected.
 - **Select First N records** - the first to the Nth record is selected, where N represents the total number of records to select. Indicate the number of records in the **Total** field.
 - **Range of records** - all records within the specified range are selected. Define the range in the **Start** and **End** fields.
 - **Every Nth record** - only the Nth record is selected, where N represents the multiple at which to select records. Define the Nth number in the **Nth** field and at which record to start the multiple count in the **Start At** field. For example, if the Nth number is 5 and the Start At number is 1, every record that is a multiple of 5 is selected. Therefore, records 5, 10, 15, and 20 are selected.
- 3 To access scripts added to this source, click **Expression**.
The **Expression Builder** window is displayed.
- 4 In the **Expression Builder** window, click **OK** when complete. Save the .XJB file.

Electronic Data Interchange (EDI) Files as a Source

The following transaction sets are supported when using EDI as a source:

- 837 Professional (HCFA, CMS 1500)
- 837 Institutional (UB-92, UB-04)
- 997 Functional Acknowledgement

Source Setup for EDI Files

Steps

- 1 Click the **Source Setup** tab.



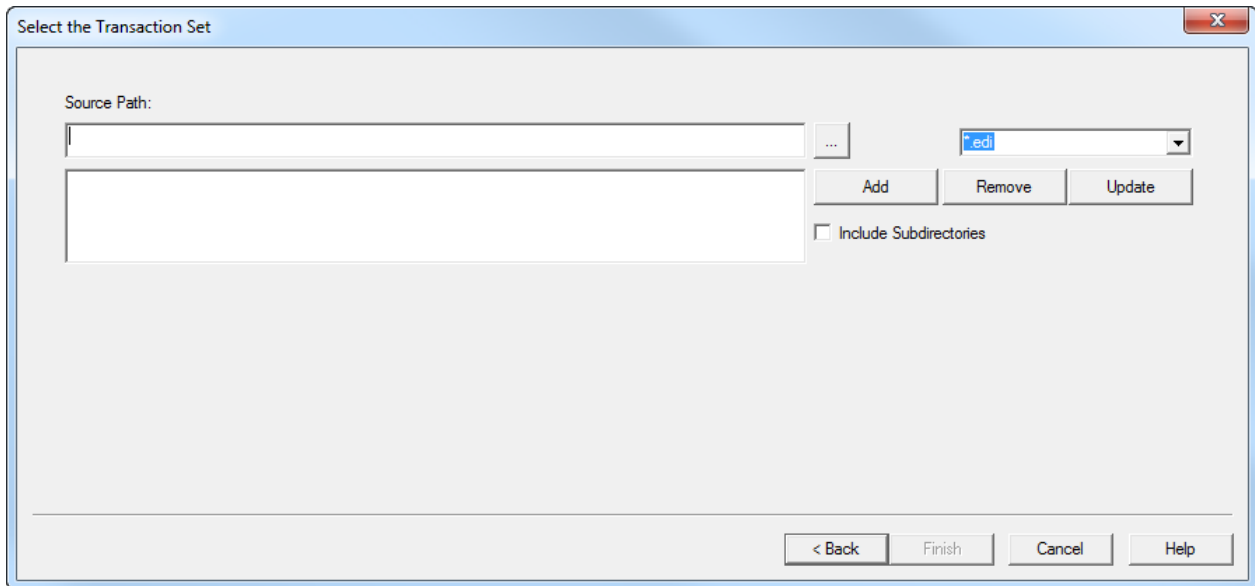
If the source has not been setup, click **Configure Source** to define the source. If the source was already set up, you can create a new project or reset the current source and restart the configuration. For more information, see [Work with Project Nodes](#) (page [284](#)).


- 2 Click **Configure Source**. The **Select Source Type** window is displayed.

- 3 Select **Electronic Data Interchange (EDI)** and click **Next**. The **Select the Transaction Set** window is displayed.

Sources

- 4 Select the **Source Transaction Set** and click **Next**. The next window requires you to enter the source path for the EDI files.



- 5 Click the **Browse** button  to locate the source file(s).
- 6 Select the file type extension from the **Files of type** drop-down list or enter a specific extension.
- 7 Click **Add** to add the source path to the list of configured paths.
- 8 To remove a source path from the list of configured paths, select the path and click **Remove**.
- 9 To modify a source path in the list of configured paths, select the path from the list and make any changes to the path in the **Source Path** field. Then click **Update**.
- 10 Select the **Include Subdirectories** check box to include all specified files types in a directory with subdirectories.
- 11 Click **Finish**. The **Source Setup** tab is displayed.

Source Mappings for EDI Files

Steps

- 1 Click the **Source Mappings** tab. A table appears listing the available source fields.
- 2 Select the **Key?** check box associated with the genuine key field, if applicable.

If the **Source Options** tab | **Multiple Records Per Image** check box is selected, select the **Key?** check box to append the image file information to each record.

- 3 Select the **Propagate?** check box to propagate the value of a filled field to blank fields below the filled field.

When using OCR for AnyDoc or .GTO files as a source, propagation stops at the end of a batch.

- 4 Select the **Image?** check box to indicate the field that contains the image path. Only one field can be identified as an image path. Additionally, the image path must be valid to transfer the image.

- 5 Click **View Source** to view the information in the selected source.

If the source was successfully linked to EXCHANGEit, the source content displays. If the source was not successfully linked to EXCHANGEit, no content or the wrong content displays. Re-evaluate the **Source Setup** tab for accuracy if no content displays. Check that the directory and source are correctly mapped. See Reset Source Nodes (page [286](#)).

If fields in the source file were changed, click **View Source** to update the fields listed in the **Available Fields** column and then click **View Source** to update the content. Any manual changes to the **Key?**, **Propagate?** and **Image?** columns are removed when the fields are refreshed and the default settings are added back to the available fields.

- 6 To view a report of the current mappings, click **Report** and select where the report should be displayed. Options include:

- **Screen**

The report is displayed on the screen in the **Report** window. Click **Close**.

- **File**

Specify the name and location to save the report and click **Save**. The file is saved as a .TXT file.

- **Printer**

Sources

- Specify the print options and click **OK**.

	Available Fields	Field Type	Length	Scale	Default Val	Key?	Propagate?
1	users.IBUserID	Integer	10	0		<input type="checkbox"/>	<input type="checkbox"/>
2	users.UserName	Char	255			<input type="checkbox"/>	<input type="checkbox"/>
3	users.UsrPassw...	Char	255			<input type="checkbox"/>	<input type="checkbox"/>
4	users.FullName	Char	255			<input type="checkbox"/>	<input type="checkbox"/>
5	users.UserDesc	Char	255			<input type="checkbox"/>	<input type="checkbox"/>
6	users.LastAccess	Timestamp	19	0		<input type="checkbox"/>	<input type="checkbox"/>
7	users.nUserAttr...	Integer	10	0		<input type="checkbox"/>	<input type="checkbox"/>
8	users.WinDomain	Char	255			<input type="checkbox"/>	<input type="checkbox"/>

Refresh Source Refresh Fields

users.UserName	users.UsrPassword	users.FullName	users.UserDesc	users.LastAccess
Admin	011501901001790	Master Administrator	Master Database Administrator	2005-02-21 00:00:00
Benton	0123546789456	Mary Benton	Licensing Coordinator	2005-03-15 00:00:00
Green	1245897456697	Tom Green	Sales Associate	2005-06-05 00:00:00
Weir	1245747852369	Marc Weir	Account Manager	2005-07-31 00:00:00
Wilson	4578945661311	Tina Wilson	Engineer	2005-08-26 00:00:00
Stanton	4567894521321	John Stanton	Director of Services	2005-08-26 00:00:00
Hastings	1245789432132	Maxwell Hastings	Account Manager	2005-03-31 00:00:00
Strickland	1234568798411	Bill Strickland	Sales Associate	2005-03-15 00:00:00
Franklin	45879684132156	Vanessa Franklin	Operations Coordinator	2005-02-22 00:00:00
Vindi	12324568789813	Choe Vindi	Engineer	2005-01-31 00:00:00
Arevalo	4555548798446	Maria Arevalo	Customer Support Specialist	2005-01-17 00:00:00
Drexler	4569812223385	Jack Drexler	Marketing Associate	2005-07-15 00:00:00
Ramirez	2135468798777	Jose Ramirez	Marketing Coordinator	2005-03-04 00:00:00
Anderson	123524165465874	Keith Anderson	Public Relations Coordinator	2004-11-26 00:00:00

Source Options for a EDI Files

Option	Description
Source Path	The path to the source .EDI file(s).
Files of Type	Select the file extension type from the drop-down list or enter a specific extension.
Search Subdirectories	Select this check box to include all .EDI files in a directory with subfolders.

Option	Description
Create 997	Returns a confirmation that the EDI file was received. Specify the 997 Output Folder.
997 Accept with Errors	Select this check box to returns a confirmation that the EDI file was received and accepted even when it contained errors.
Move EDI File After Processing	Select this check box to move the processed EDI files to another location. If this check box is selected, specify the location they should be moved to.
Output Subdirectory Type	Select None if no subdirectory should be created and Date if a subdirectory with the current date should be created.
Custom Fields	Click to open the Custom Fields window (page 75). On this window, custom fields can be created, deleted or modified. Custom fields must include a Name, Loop, Segment ID, and Code.

Managing Custom Fields

On the Custom Fields window, custom fields can be created, deleted, or modified as needed for EDI source files. Custom fields must include a Name, Loop, Segment ID, and Code.

The Source Mapping tab can be refreshed to display these new fields.

Add A Field

Steps

- 1 Enter the following information:

- **Name**
- **Loop**
- **Segment**
- **Code**

- 2 Click **Add**.

The row is added to the **Custom Fields** list.

Edit A Field

Steps

Sources

- 1 Select the field row to be edited.
The field data is displayed in the top fields.
- 2 Modify the data as needed.
- 3 Click **Update**.

Delete A Field

Steps

- 1 Select a field row.
- 2 Click **Delete**.
The row is deleted from the **Custom Fields** list.

Source Selections for EDI Files

The Source Selections tab determines which records to transfer from the source to the destination. If VBScript is used it can be accessed from this tab also. For more information, see Use VBScript (page [307](#)).

Steps

- 1 Click the **Source Selections** tab.
- 2 Select one of the following options in the **Type of selection** section:
 - **Select All Records** - all records in the source file are selected.
 - **Select First N records** - the first to the Nth record is selected, where N represents the total number of records to select. Indicate the number of records in the **Total** field.
 - **Range of records** - all records within the specified range are selected. Define the range in the **Start** and **End** fields.
 - **Every Nth record** - only the Nth record is selected, where N represents the multiple at which to select records. Define the Nth number in the **Nth** field and at which record to start the multiple count in the **Start At** field. For example, if the Nth number is 5 and the Start At number is 1, every record that is a multiple of 5 is selected. Therefore, records 5, 10, 15, and 20 are selected.
- 3 To access scripts added to this source, click **Expression**.
The **Expression Builder** window is displayed.
- 4 In the **Expression Builder** window, click **OK** when complete. Save the .XJB file.

Text File as a Source

A text file is a common EXCHANGEit source. Two types of text files are supported:

- Delimited
- Fixed width

Source Setup for a Text File

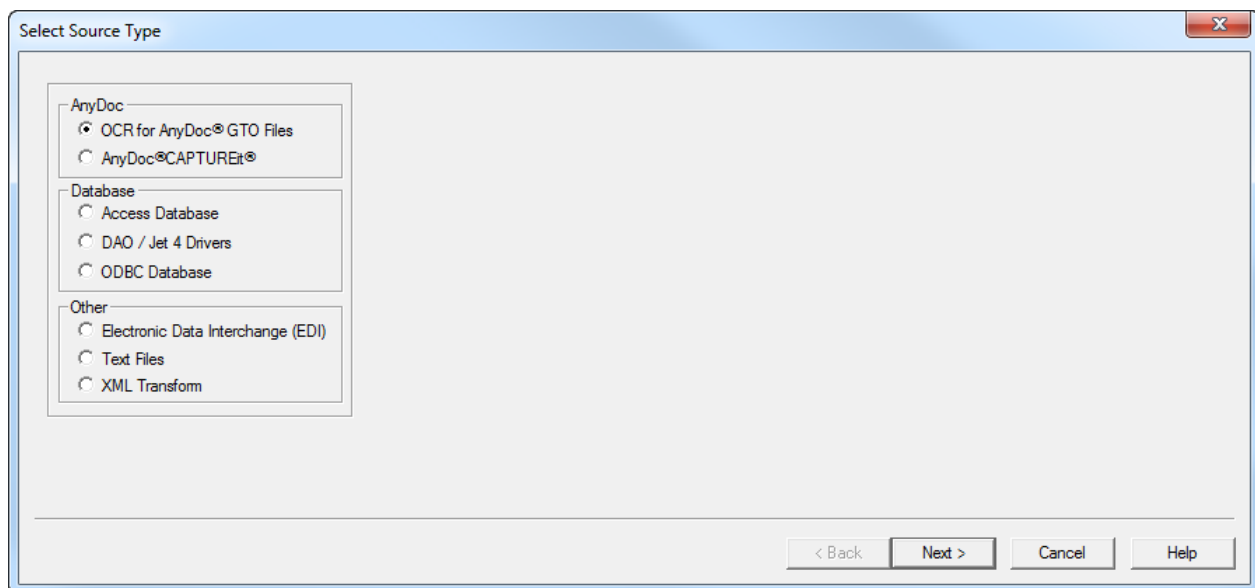
Steps

- 1 Click the **Source Setup** tab.



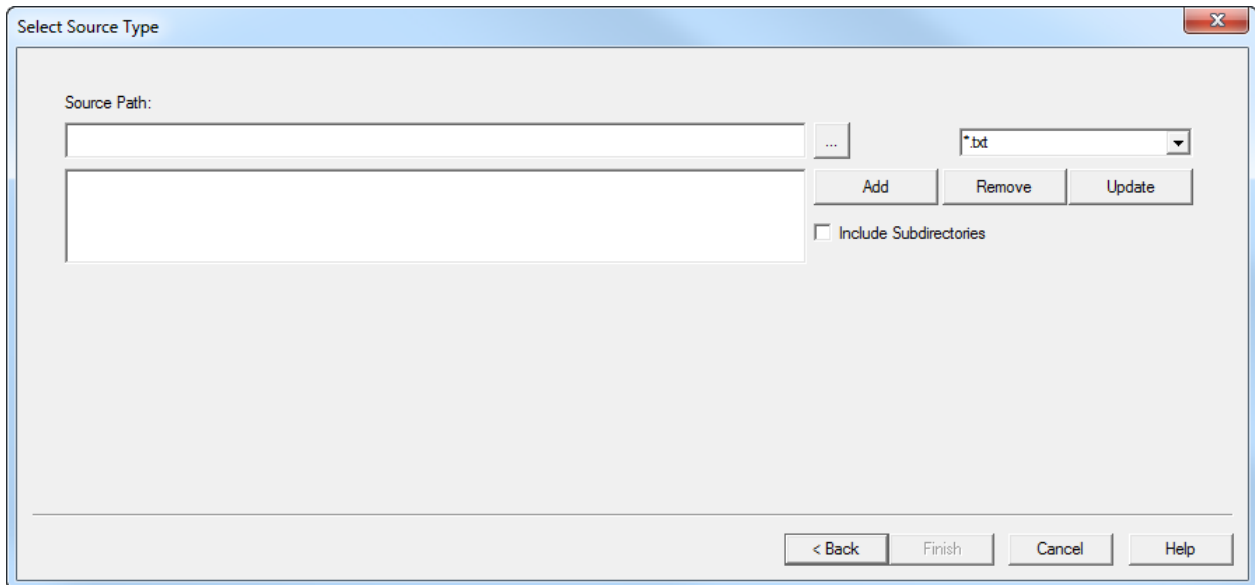
If the source has not been setup, click **Configure Source** to define the source. If the source was already set up, you can create a new project or reset the current source and restart the configuration. For more information, see [Work with Project Nodes](#) (page [284](#)).


- 2 Click **Configure Source**. The **Select Source Type** window is displayed.



Sources

- 3 Select **Text Files** and click **Next**. The next window requires you to enter the source path for the text files.



- 4 Click the **Browse** button  and map to the .TXT source file(s).
- 5 Click **Add** to add the source path to the list of configured paths.
- 6 To remove a source path from the list of configured paths, select the path and click **Remove**.
- 7 To modify a source path in the list of configured paths, select the path from the list and make any changes to the path in the **Source Path** field. Then click **Update**.
- 8 Select the **Include Subdirectories** check box to include all specified files types in a directory with subdirectories.
- 9 Click **Finish**. The **Source Setup** tab is displayed.

Source Mappings for a Text File

Depending on how records in the .TXT file are structured, records are identified in the Source Mappings tab as either "fixed" or "delimited."

- Fixed .TXT files define fields using sets of beginning and ending columns. For more information, see Fixed Width Text Files (page [79](#)).
- Delimited .TXT files separate fields by a character, such as a comma, tab or semicolon. For more information, see Delimited Text Files (page [83](#)).

Fixed Width Text Files

The procedure below provides instructions on configuring fixed .TXT files. See Source Mappings for Delimited Text Files (page [83](#)) if records in the .TXT file are delimited.

Steps

- 1 Click the **Source Mappings** tab. A table appears listing the available source fields.
- 2 Select the **Key?** check box associated with the genuine key field, if applicable.
If the **Source Options** tab | **Multiple Records Per Image** check box is selected, select the **Key?** check box to append the image file information to each record.
- 3 Select the **Propagate?** check box to propagate the value of a filled field to blank fields below the filled field.
When using OCR for AnyDoc or .GTO files as a source, propagation stops at the end of a batch.
- 4 Select the **Image?** check box to indicate the field that contains the image path.
Only one field can be identified as an image path. Additionally, the image path must be valid to transfer the image.
- 5 Click **View Source** to view the information in the selected source.
If the source was successfully linked to EXCHANGEit, the source content displays.
If the source was not successfully linked to EXCHANGEit, no content or the wrong content displays. Re-evaluate the **Source Setup** tab for accuracy if no content displays. Check that the directory and source are correctly mapped. See Reset Source Nodes (page [286](#)).
If fields in the source file were changed, click **View Source** to update the fields listed in the **Available Fields** column and then click **View Source** to update the content. Any manual changes to the **Key?**, **Propagate?** and **Image?** columns are removed when the fields are refreshed and the default settings are added back to the available fields.
- 6 To view a report of the current mappings, click **Report** and select where the report should be displayed. Options include:
 - **Screen**
The report is displayed on the screen in the **Report** window. Click **Close**.
 - **File**
Specify the name and location to save the report and click **Save**. The file is saved as a .TXT file.
 - **Printer**

Sources

- Specify the print options and click **OK**.

7 Click the **Define Fields** button.

The **Text Import Wizard - Step 1 of 3** window is displayed.

Text Import Wizard - Step 1 of 3

Choose the file type that best describes your data:

☒ Fixed Width - Fields are aligned in columns with spaces separating each field

☐ Delimited - Characters such as commas or tabs separate each field

Start Import At Row:

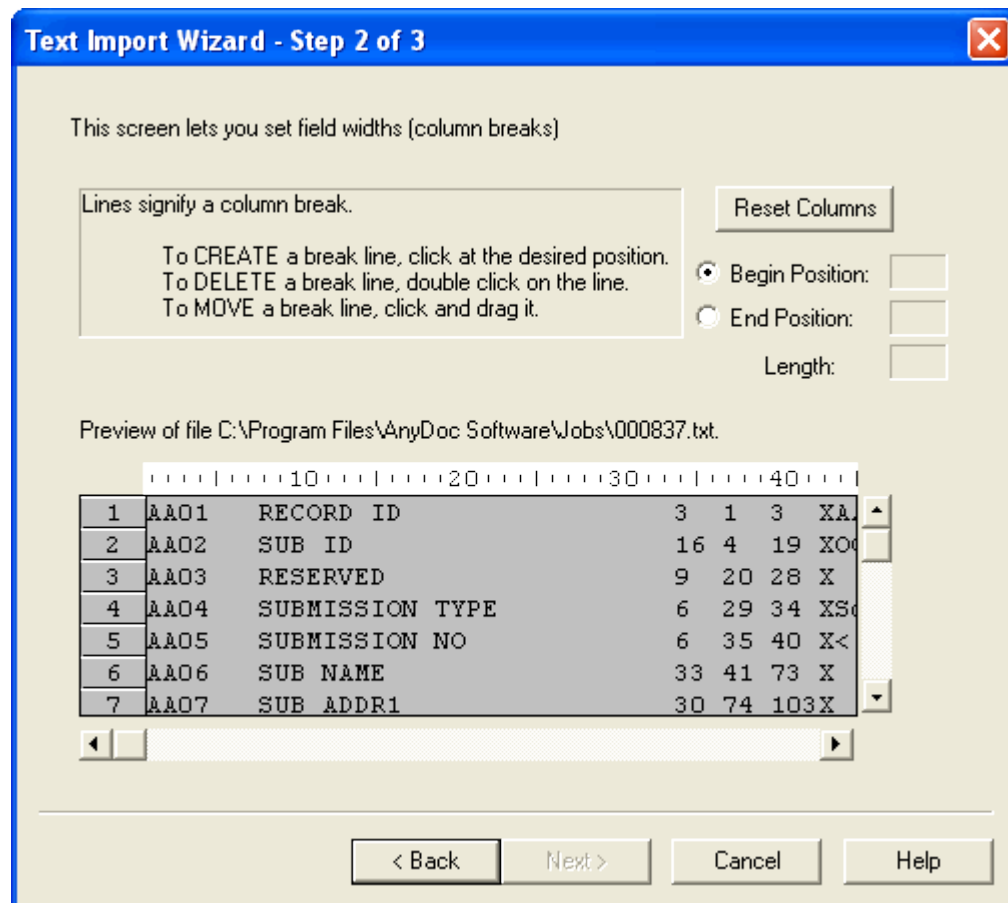
Preview of file C:\Program Files\AnyDoc Software\Jobs\000837.txt.

	10	20	30	40
1	AA01	RECORD ID	3 1 3	XA
2	AA02	SUB ID	16 4 19	XO
3	AA03	RESERVED	9 20 28	X
4	AA04	SUBMISSION TYPE	6 29 34	XS
5	AA05	SUBMISSION NO	6 35 40	X<
6	AA06	SUB NAME	33 41 73	X
7	AA07	SUB ADDR1	30 74 103	X

< Back Next > Cancel Help

- 8 Select the **Fixed Width** radio button.
- 9 To begin importing at a row other than the first row, indicate the row at which to start importing records in the **Start Import At Row** field.

- 10 Click **Next**. The Text Import Wizard - Step 2 of 3 window is displayed.



- 11 Indicate the start and end of all columns to map to the destination.
Using the ruler as a guide, separate the columns with green and red vertical lines.

- Green lines indicate the start of a column
- Red lines indicate the end of a column

To insert lines:

- Click once for a green line
- Click next to a green line for a red line

To move a line, click and drag the line to the correct width. Be sure to hold the left mouse button down while dragging. Conjoined lines move as a unit.

To remove lines:

- Remove one line by double clicking on the line. Conjoined lines are removed at the same time.

Sources

- Remove all lines by clicking the **Reset Columns** button.

Text Import Wizard - Step 2 of 3

This screen lets you set field widths (column breaks)

Lines signify a column break.

To CREATE a break line, click at the desired position.
To DELETE a break line, double click on the line.
To MOVE a break line, click and drag it.

Reset Columns

☒ Begin Position: 66
☐ End Position: 65
Length: 0

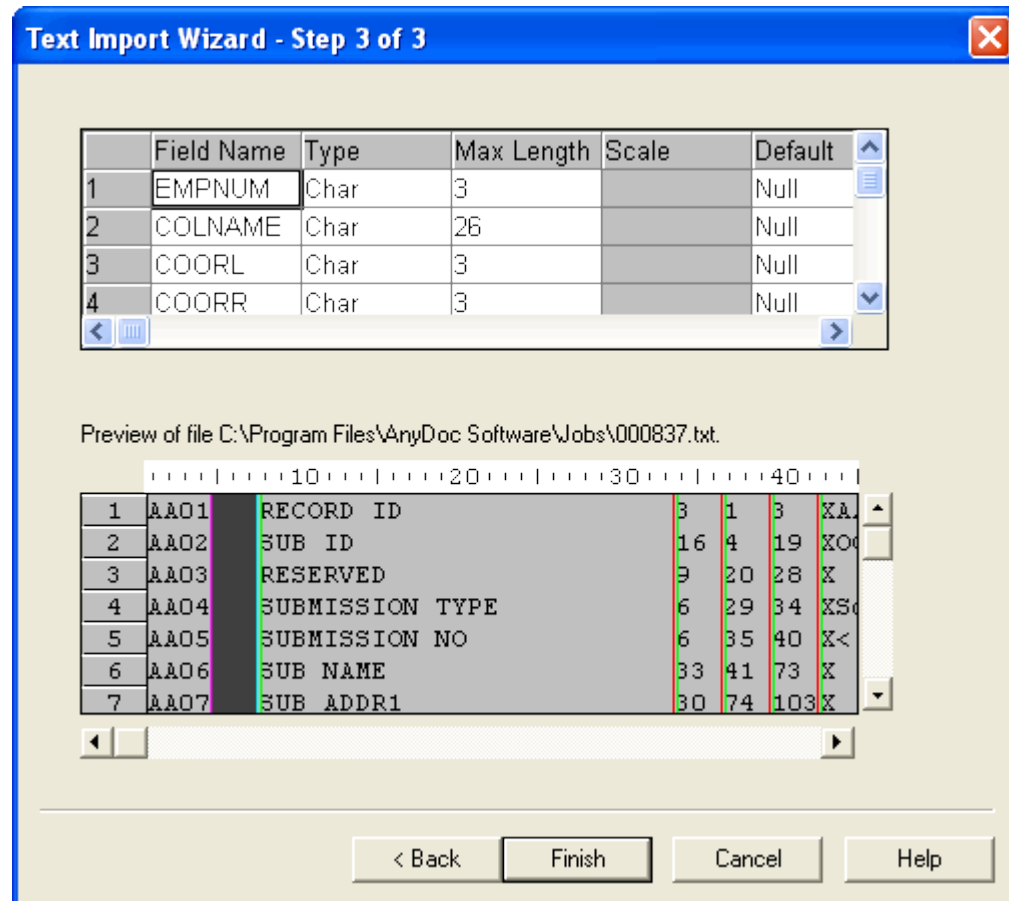
Preview of file C:\Program Files\AnyDoc Software\Jobs\000837.txt.

	10	20	30	40
1 AA01	RECORD ID	3	1	3 XA
2 AA02	SUB ID	16	4	19 X0
3 AA03	RESERVED	9	20	28 X
4 AA04	SUBMISSION TYPE	6	29	34 XSc
5 AA05	SUBMISSION NO	6	35	40 X<
6 AA06	SUB NAME	33	41	73 X
7 AA07	SUB ADDR1	30	74	103 X

< Back Next > Cancel Help

- 12** After positioning the final red line, click **Next**. The Text Import Wizard - Step 3 of 3 window is displayed.

A grid at the top of the window shows the column names. Click in each line to change any of the names or settings on the grid. The column you are working in is selected in both the grid and the document.



13 Click **Finish**. Click **Finish**. The Source Mappings tab is displayed.

14 Click **View Source** to examine the data to be moved to a destination.

The data now displays in the columns created in the wizard. You may redefine the fields at any time by clicking **Define Fields** and following the wizard again. The wizard does not remove the previous field definitions, but does allow changes to be made.

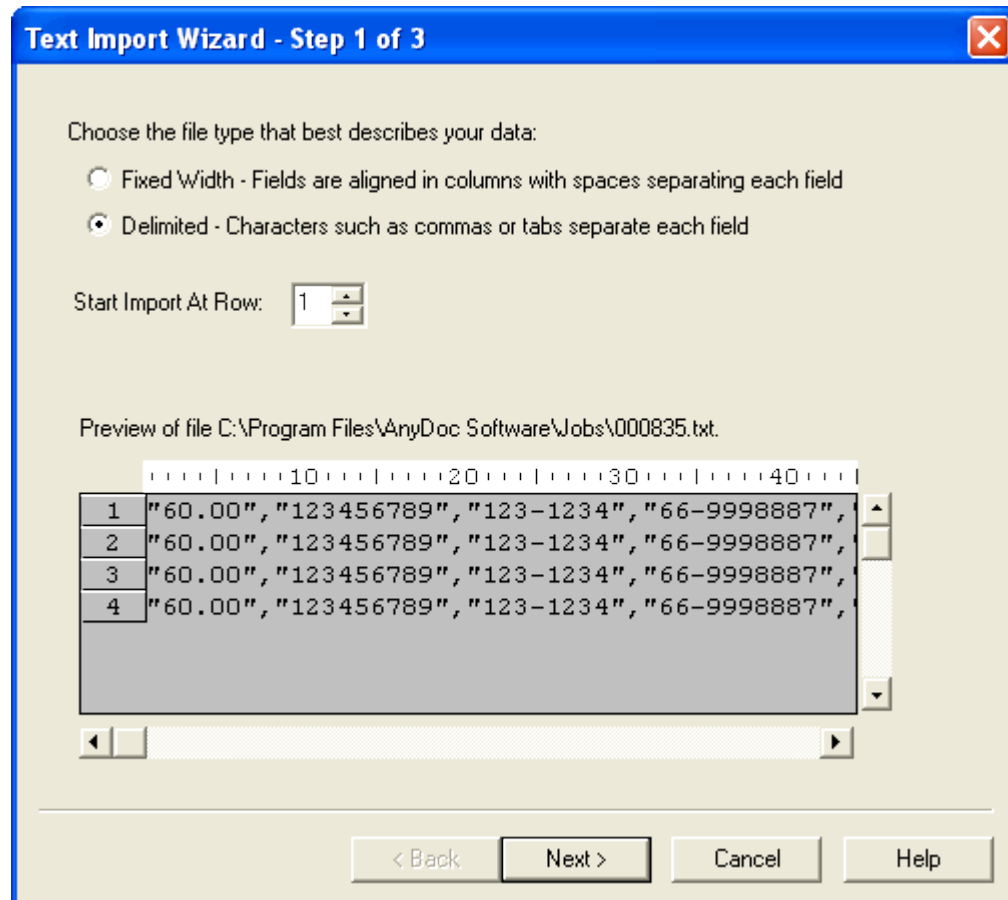
Delimited Text Files

The procedure below provides instructions on configuring delimited .TXT files. Delimiters separate fields and/or records so that information can be removed or “parsed” from the file by a program or script. See Source Mappings for Fixed Text Files (page 79) if records in the .TXT file are fixed.

Sources**Steps**

- 1 Click the **Source Mappings** tab. A table appears listing the available source fields.
- 2 Select the **Key?** check box associated with the genuine key field, if applicable.
If the **Source Options** tab | **Multiple Records Per Image** check box is selected, select the **Key?** check box to append the image file information to each record.
- 3 Select the **Propagate?** check box to propagate the value of a filled field to blank fields below the filled field.
When using OCR for AnyDoc or .GTO files as a source, propagation stops at the end of a batch.
- 4 Select the **Image?** check box to indicate the field that contains the image path.
Only one field can be identified as an image path. Additionally, the image path must be valid to transfer the image.
- 5 Click **View Source** to view the information in the selected source.
If the source was successfully linked to EXCHANGEit, the source content displays. If the source was not successfully linked to EXCHANGEit, no content or the wrong content displays. Re-evaluate the **Source Setup** tab for accuracy if no content displays. Check that the directory and source are correctly mapped. See Reset Source Nodes (page [286](#)).
If fields in the source file were changed, click **View Source** to update the fields listed in the **Available Fields** column and then click **View Source** to update the content. Any manual changes to the **Key?**, **Propagate?** and **Image?** columns are removed when the fields are refreshed and the default settings are added back to the available fields.
- 6 To view a report of the current mappings, click **Report** and select where the report should be displayed. Options include:
 - **Screen**
The report is displayed on the screen in the **Report** window. Click **Close**.
 - **File**
Specify the name and location to save the report and click **Save**. The file is saved as a .TXT file.
 - **Printer**
- 7 Specify the print options and click **OK**.
- 8 Click **Define Fields**.

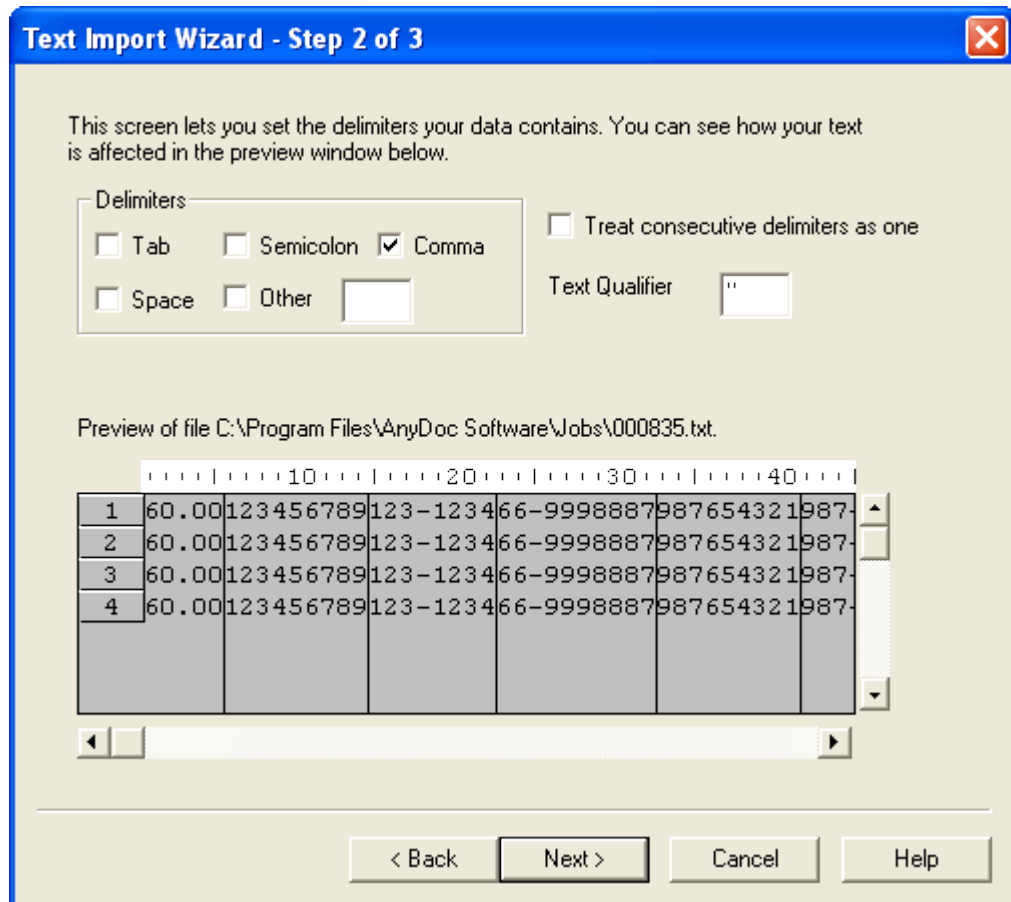
The **Text Import Wizard - Step 1 of 3** window is displayed.



- 9 Select **Delimited**.
- 10 To begin importing at a row other than the first row, indicate the row at which to start importing records in the **Start Import At Row** field.
- 11 Click **Next**.

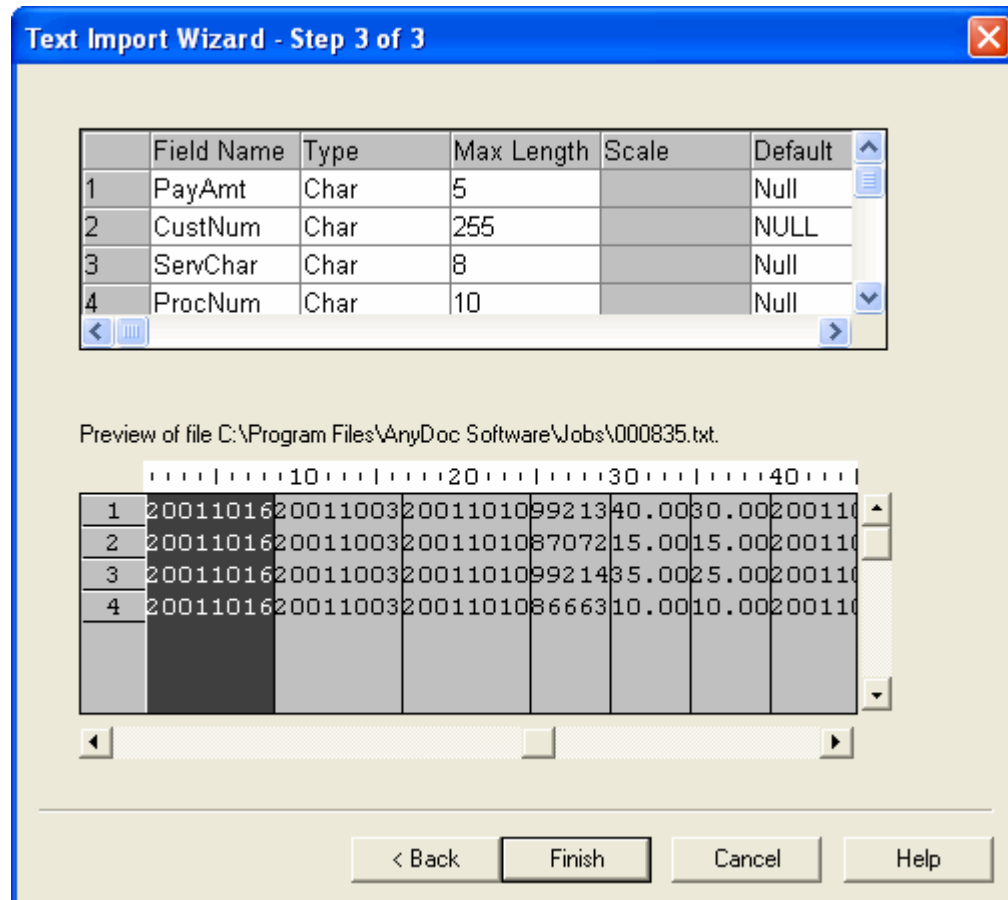
Sources

The **Text Import Wizard - Step 2 of 3** window is displayed.



- 12 Indicate what delimiter separates fields in the .TXT file in the Delimiters section. The Comma check box is enabled by default.
- 13 Select the **Treat consecutive delimiters as one** check box if working with multiple delimiters (e.g., row and record delimiters) that are a unit.
- 14 Enter a **Text Qualifier** in the field if the text files use characters not used as explicit delimiters.
- 15 Click **Next**.

The **Text Import Wizard - Step 3 of 3** window is displayed.



- 16 Customize field settings within the grid according to the limits of the destination. For example, a particular field may only store up to 30 characters in the destination database; therefore, the max length of that field should be 30. The grid is located on the top of Text Import Wizard - Step 3 of 3 window. Options include:
 - **Field Name** - unique identifier of the field
 - **Type** - format of the data within the field, such as date, time, currency, character
 - **Max Length** - maximum number of characters the field can hold; characters exceeding the limit are truncated
 - **Scale** - number of digits to the right of the decimal point
 - **Default** - not available at this time
- 17 Click **Finish**.
The Source Mappings tab is displayed.

Sources


- 18 Verify the columns and field settings. You may redefine the fields at any time by clicking **Define Fields** and following the wizard again. The wizard does not remove the previous field definitions, but does allow changes to be made.

Source Options for a Text File

In the **Source Options** tab, the option is given to change the source to another text file.

Steps

- 1 Click the **Source Options** tab.

- 2 To change the source to another text file, click the **Browse** button  next to the **Source Path** field to map to the new text file.
- 3 To move the .TXT file from the source directory to a new directory after the source is transferred to the destination, select the **Move Text File After Processing** check box and do the following:
 - a) Browse to a valid path in the **Text File Destination** field to move the source file(s) after the data is transferred.



If the Move Text File After Processing check box was selected in the Source Options tab and the Include Subfolders check box was selected in the Source Setup tab, do not set the Text File Destination to a subfolder in the source directory. Moving the files to the same directory causes the files to be reprocessed and will result in duplicate data errors.

- b) Select the **Output Subdirectory Type** from the drop-down list.
- 4 To delete the source folder, select the **Delete Source Folder After Processing** check box.

Source Selections for a Text File

The Source Selections tab determines which records to transfer from the source to the destination. If VBScript is used it can be accessed from this tab also. For more information, see Use VBScript (page [307](#)).

Steps

- 1 Click the **Source Selections** tab.
- 2 Select one of the following options in the **Type of selection** section:
 - **Select All Records** - all records in the source file are selected.
 - **Select First N records** - the first to the Nth record is selected, where N represents the total number of records to select. Indicate the number of records in the **Total** field.
 - **Range of records** - all records within the specified range are selected. Define the range in the **Start** and **End** fields.
 - **Every Nth record** - only the Nth record is selected, where N represents the multiple at which to select records. Define the Nth number in the **Nth** field and at which record to start the multiple count in the **Start At** field. For example, if the Nth number is 5 and the Start At number is 1, every record that is a multiple of 5 is selected. Therefore, records 5, 10, 15, and 20 are selected.
- 3 To access scripts added to this source, click **Expression**.
The **Expression Builder** window is displayed.
- 4 In the **Expression Builder** window, click **OK** when complete. Save the .XJB file.

XML Transform as a Source

Extensible Markup Language (XML) is a format for exchanging data across different programs and platforms. XML Transform offers the ability to transfer .XML files from OCR for AnyDoc to .XML, .HTML, or .TXT files. Parameters are passed to the transform without relying on an XML schema. An XML Transform job takes the .XML files and transforms them into the output files. This source acts as both the source and destination so a separate destination cannot be configured.

Source Setup for XML Transform

Steps

- 1 Click the **Source Setup** tab.


Sources




If the source has not been setup, click **Configure Source** to define the source. If the source was already set up, you can create a new project or reset the current source and restart the configuration. For more information, see [Work with Project Nodes](#) (page [284](#)).

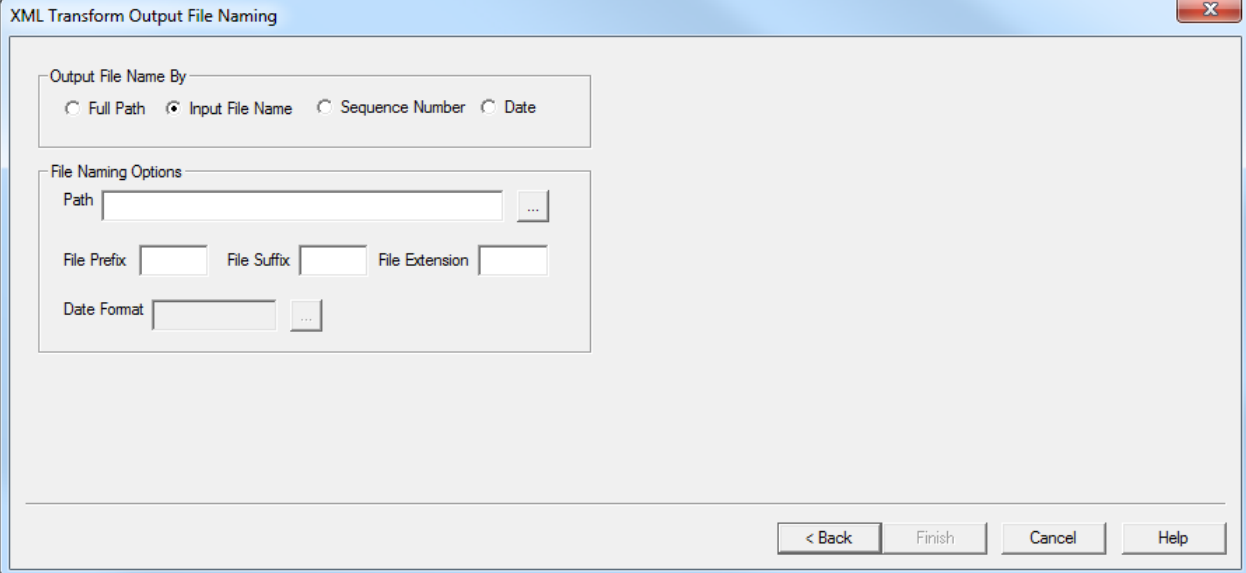
- Click **Configure Source**. The **Select Source Type** window is displayed.

- Select **XML Transform** and click **Next**. The **XML Transform Input Files** window is displayed.


- In the **XML File Specification** field, click the **Browse** button  and map to the

XML source files.

- 5 Select the **Search Subdirectories** check box to include all XML files in a directory with subdirectories.
- 6 In the **XSLT Full Path** field, click the **Browse** button  and map to the source XSL file and click **Next**. The **XML Transform Output File Naming** window is displayed.




The dialog box is titled "XML Transform Output File Naming". It contains two main sections. The first section, "Output File Name By", has four radio buttons: "Full Path", "Input File Name" (which is selected), "Sequence Number", and "Date". The second section, "File Naming Options", contains four fields: "Path" (with a browse button), "File Prefix", "File Suffix", and "File Extension". Below these is a "Date Format" field with a browse button. At the bottom right are four buttons: "< Back", "Finish", "Cancel", and "Help".

- 7 In the **Output File Name By** section, select how the output file should be named. Options are:
 - **Full Path:** Names the output file in the specified location and by the name specified in the **Path** field.
 - **Input File Name:** Names the output file with the same file name as the source.
 - **Sequence Number:** Names the output file by sequence number.
 - **Date:** Names the output file according to the date the job was processed.
- 8 In the **File Naming Options** section, specify the file naming options that are applicable to the selected file name format. Options are:
 - **Path:** Enter the output file location or click the **Browse** button  to map to an existing location.
 - **File Prefix:** The file prefix is added to the beginning of the file name
 - **File Suffix:** The file suffix is added to the end of the file name.
 - **File Extension:** The file extension that is applied to the output file. Valid

Sources

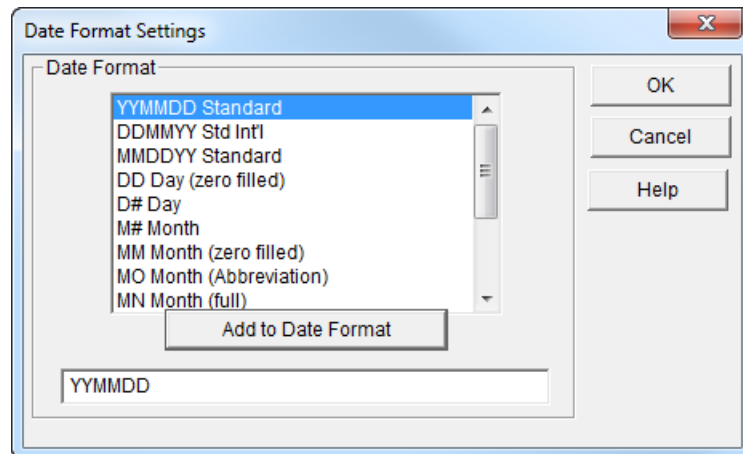
extensions include **.xml**, **.txt**, or **.html**.

- **Date Format:** Click the **Browse** button  to select a date format from the **Date Format Settings** window. For more information, see Set Date Format Settings (page 92).

9 Click **Finish**.

Set Date Format Settings

When selecting the Name By Date option is selected, you must also specify the date format in the Date Format Settings Window. You can select a complete date, such as month, day, and year or individual day, month, or year components to specify a custom output format.



The following Date Output formats are available:

Date Format	Description
YYMMDD Standard	Standard six-digit date, items are zero filled.
DDMMYY Std Int'l	Standard International six-digit date, items are zero filled.
MMDDYY	Standard six-digit date, items are zero filled.
DD Day (zero filled)	Two-digit day, zero-filled if applicable.
D# Day	Day number (between 1 and 31).
M# Month	Month number (between 1 and 12).
MM Month (zero filled)	Two-digit month number, zero-filled if applicable.
MO Month (Abbreviation)	Three character standard month abbreviation. For example, OCT or DEC.

Date Format	Description
MN Month (full)	Month name spelled out. For example, October or December.
MH Month (Hollerith Code)	Month is converted to single character Hollerith Code equivalent. Jan through Sep are 1 - 9, Oct is 0 (zero), Nov is - (minus), and Dec is &.
Y1 Year (1 digit)	Only the last digit of the year is output. For example, 1987 would output 7 and 1992 would output 2.
YY Year (2 digit)	Output the last two digits of the year. For example, 1987 would output 87 and 1992 would output 92.
Y4 Year (4 digit)	Output the four digit year. For example, 1987 would output as 1987.
DDMMY4 (Std Int'l)	Standard international eight-digit date (zero filled) with the day before the month..
Y4MMDD (Standard)	Standard eight-digit date with the year first (zero filled).
MMDDY4 (Standard)	Standard eight-digit date with the year at the end (zero filled).
JJ (Julian Day)	The sequential day number within the year. For example, February 1st would output as 32.
JO (Julian Day, zero filled)	The sequential day number within the year, zero filled. For example, February 1st would output as 032.
- Hyphen	Places a hyphen in the output.
/Slash	Places a slash in the output.

To specify a date format

- 1 Select the appropriate combination of date components in the appropriate format and click **Add to Date Format**.

It will be added to the field below.

- 2 Click **OK**.

To specify a custom date format

- 1 Select a date component and click **Add to Date Format**.
It will be added to the field below.
- 2 Repeat for any additional date format components you want to include.
- 3 Click **OK**.

Source Options for XML Transform

The Source Options tab contains the options that were selected during the source setup process. The selected source options can be modified at any time on this tab.



Steps

- 1 Click the **Source Options** tab.

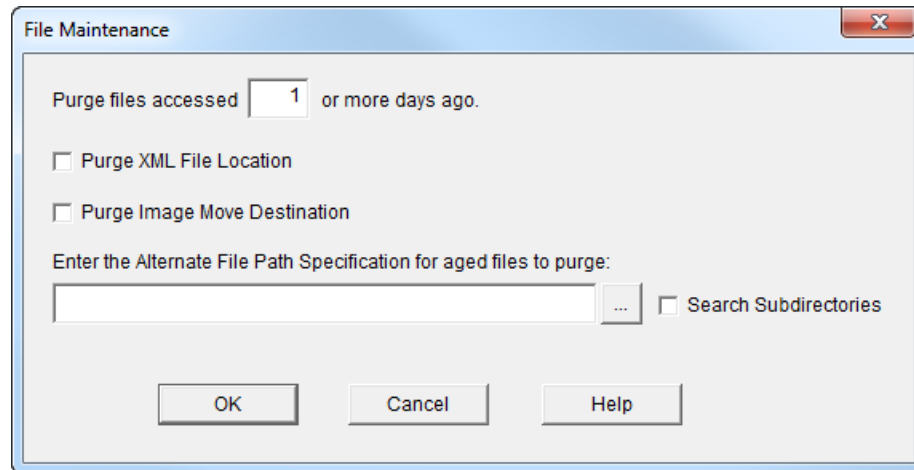
The screenshot shows the 'Source Options' tab in the EXCHANGEit software. The interface includes the following elements:

- Input Files:**
 - XML File Specification: ☐ Search Subdirectories. Path: C:\ProgramData\AnyDoc\EXCHANGEit\AnyDoc.xml
 - XSLT Full Path: C:\ProgramData\AnyDoc\EXCHANGEit\AnyDoc\XML.xsl
- Optional Parameters for the XSLT:** A table with columns Name, Value, and Namespace.
- Output File Naming:**
 - Radio buttons: ☐ Full Path, ☐ Input File Name, ☒ Sequence Number, ☐ Date
 - Path: C:\ProgramData\AnyDoc\EXCHANGEit
 - File Prefix, File Suffix, File Extension (empty fields)
 - Date Format (empty field)
- If file exists:** ☐ Overwrite, ☐ Append, ☒ Error
- ☐ Move XML Files After Processing
- Error Threshold: 1
- Buttons: Delete Parameter, File Maintenance, Help


- 2 Modify the **Input Files** and **Output File Naming** options, as necessary.
- 3 To add **Optional Parameters for the XSLT**, enter the Name, Value, and Namespace, respectively, and press [Enter].

 To delete a parameter, select the parameter name and click **Delete Parameter**.
- 4 In the **Error Threshold** field, enter the number of errors that can occur while processing a job.
- 5 Select the **Move XML Files After Processing** check box, if applicable and click the Browse button  to select the location to move the files to.
- 6 To remove old files that are no longer needed or that have been archived, click **File Maintenance**.

The **File Maintenance** window is displayed.



7 Do the following:

- a) To delete the XML directory, select the **Purge XML Location** check box.
- b) To delete the image directory, select the **Purge Image Location** check box.
- c) To specify a directory to purge files older than the specified number of days, click the **Browse** button  and map to the directory from which to remove the files.
- d) Enter how many days old the file must be in the **Purge files access ___ or more days ago** field.
The minimum age for files is set at one day.
- e) Select the **Search Subdirectories** check box to also remove files within the subdirectories of the specified path.
- f) Click **OK**.

After the job is run, all files that meet the specified requirements are deleted.

Source Selections for XML Transforms

The Source Selections tab determines which records to transfer from the source to the destination. If VBScript is used it can be accessed from this tab also. For more information, see Use VBScript (page [307](#)).

Steps

- 1** Click the **Source Selections** tab.
- 2** Select one of the following options in the **Type of selection** section:

Sources

- **Select All Records** - all records in the source file are selected.
 - **Select First N records** - the first to the Nth record is selected, where N represents the total number of records to select. Indicate the number of records in the **Total** field.
 - **Range of records** - all records within the specified range are selected. Define the range in the **Start** and **End** fields.
 - **Every Nth record** - only the Nth record is selected, where N represents the multiple at which to select records. Define the Nth number in the **Nth** field and at which record to start the multiple count in the **Start At** field. For example, if the Nth number is 5 and the Start At number is 1, every record that is a multiple of 5 is selected. Therefore, records 5, 10, 15, and 20 are selected.
- 3 To access scripts added to this source, click **Expression**.
The **Expression Builder** window is displayed.
 - 4 In the **Expression Builder** window, click **OK** when complete. Save the .XJB file.

Chapter 5

Destinations

Destinations receive the information transferred from the source files. When working with destinations:

- Ensure the destination is installed on the workstation
- Know how to store the destination data

Supported Destinations

The following destinations are supported:

- **Hyland OnBase 13 Connector**
For more information, see Hyland OnBase 13 Connector (page [102](#)).
- **AnyDoc DEPOSit**
For more information, see AnyDoc DEPOSit as a Destination (page [107](#)).
- **AnyDoc ECM**
For more information, see AnyDoc ECM as a Destination (page [110](#)).
- **OCR for AnyDoc**
For more information, see OCR for AnyDoc as a Destination (page [114](#)).
- **Access Database**
For more information, see Access Database as a Destination (page [118](#)).
- **DAO Databases / Jet 4 Drivers**
Transfer information to Btrieve, dBase, FoxPro and Paradox databases. DAO (Data Access Objects) databases are accessed by Microsoft's Jet database engine. For more information, see DAO Database as a Destination (page [123](#)).
- **ODBC Databases**
Transfer information to ODBC-compliant databases such as Oracle, SQL Server, Sybase and Visual FoxPro databases. For more information, see ODBC Database as a Destination (page [129](#)).
- **Electronic Data Interchange**
Transfer information to EDI-compliant files. For more information, see Electronic Data Interchange (EDI) File as a Destination (page [133](#)).
- **Imaging Applications**

Destinations

Transfer information to a variety of third party imaging applications. For more information, see Imaging Applications (page [154](#)).

- **Text Files**

Transfer information to text files that are fixed or delimited. For more information, see Text File as a Destination (page [240](#)).

- **SAP**

Transfer information to text files that are fixed or SAP. For more information, see SAP Setup and the HTTP Content Repository (page [247](#)).

Multiple Destinations

When an EXCHANGEit job has multiple destinations that are the same, each destination will use up a license, even if it is used in the same job. For example, if you have a 3-user license and 3 destinations are created in one job then EXCHANGEit will use up all of the licenses. If another user is logged in to EXCHANGEit, then the job won't run because it will be short a license for the third destination in that job.

When multiple jobs are run in succession there might be a delay in that destination's application that prevents a license from being made available soon enough. For example, if the delay is 5 minutes and each job only takes 1 minute to run then all three seats of the license will be used when the third job runs. Even though the first job's license is no longer in use 5 minutes have not passed. The SleepSeconds VBScripts function can help with this issue on the Job Scripts tab. It can be added to the Global Clean Up script or Global Initialize script. If the SleepSeconds(300) script is run, then EXCHANGEit will wait 5 minutes (300 seconds) before the next job runs; therefore the license will be freed. For more information, see Using VBScript (page [307](#)).

Configuring Destinations

A destination is configured in six steps. The steps correlate with each destination tab folder and must be completed in the order of the tab folders from left to right, as follows:

- 1 **Dest. Desc.** - Name of the destination and any comments regarding the specific project. The destination's description displays on the destination node. This tab folder is completed in the same manner for all destinations. See Add a Destination Description to Any Destination (page [101](#)).
- 2 **Dest. Setup** - Indicates the destination type, location and name of the file containing the information received by the destination. Additional information may need to be specified depending on the destination.
- 3 **Dest. Mappings** - Displays the available fields that are mapped to the destination.

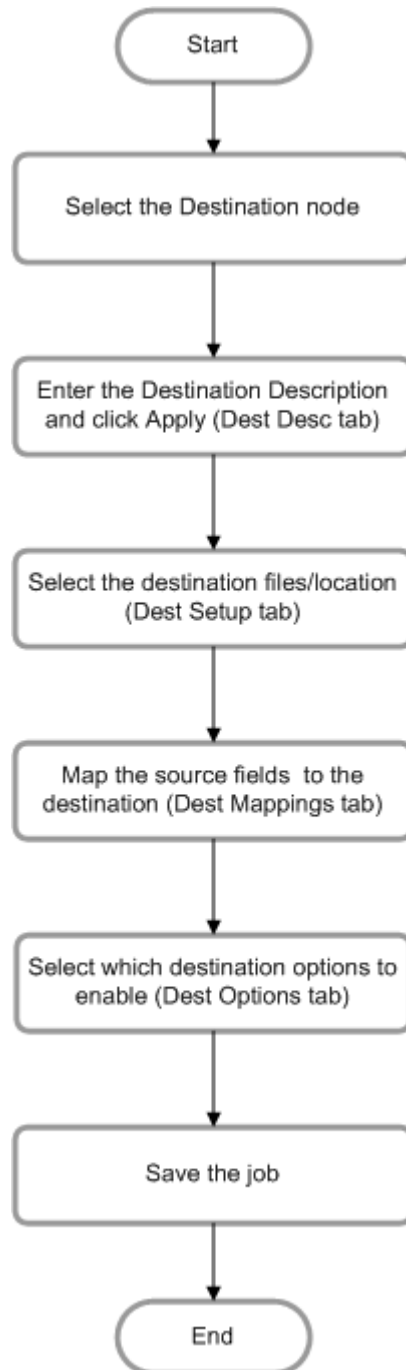
Mapping refers to the process of assigning source information fields to destination fields and is performed when configuring the destination. A View Dest. button is provided to view the information being transferred to the destination.

- 4 Dest. Options** - Provides different options available to the destination. If the destination is a database, the database login information must be defined.
- 5 Dest. Selection** - Indicates which records are transferred to the destination.
- 6 Job Scripts** - Where VBScript being run on the destination is entered, if applicable. The Expressions Builder is accessed from this tab folder to add VBScript to the project. See Use VBScript (page [307](#)).

See the Destination Configuration Flowchart (page [100](#)).

Destinations

Destination Configuration Flowchart



Add a Destination Description

All destinations have a Dest. Desc. tab to name the destination and enter any comments or additional information regarding the destination. Use the procedure below to complete the Dest. Desc. tab for all destinations.


Steps

- 1 Select the destination node in the flowchart

OR

If no destination node exists, right-click the source or link node under which to add the destination and select **Add Destination**. New destinations can only be added to source or link nodes.

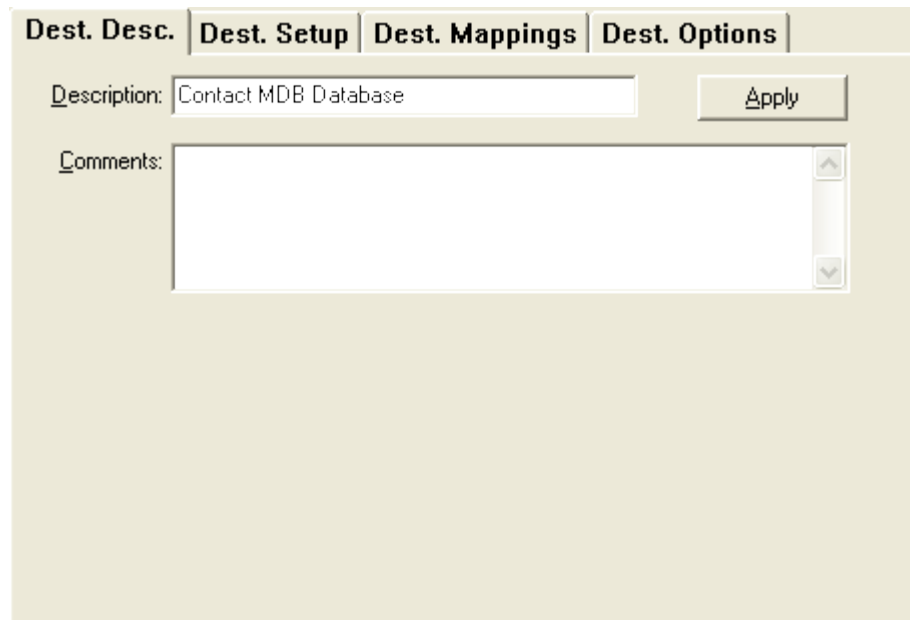


A destination can also be added by clicking the **Add Destination** button, , in the toolbar. Ensure that the appropriate source or link node is selected before adding the destination so that the destination is created in the right location within the tree. Selected nodes are outlined in red.

- 2 Enter a destination name in the **Description** field.
- 3 Enter any notes regarding this destination in the **Comments** field.
- 4 Click **Apply**. The destination name entered in the **Description** field appears on the destination node in the window's left pane.

Destinations

- 5 Save the .XJB file.



The screenshot shows a window titled "Destinations" with four tabs: "Dest. Desc.", "Dest. Setup", "Dest. Mappings", and "Dest. Options". The "Dest. Setup" tab is selected. It contains a "Description:" label followed by a text box containing "Contact MDB Database" and an "Apply" button. Below this is a "Comments:" label followed by a large text area with a vertical scrollbar on the right.

Hyland OnBase 13 Connector

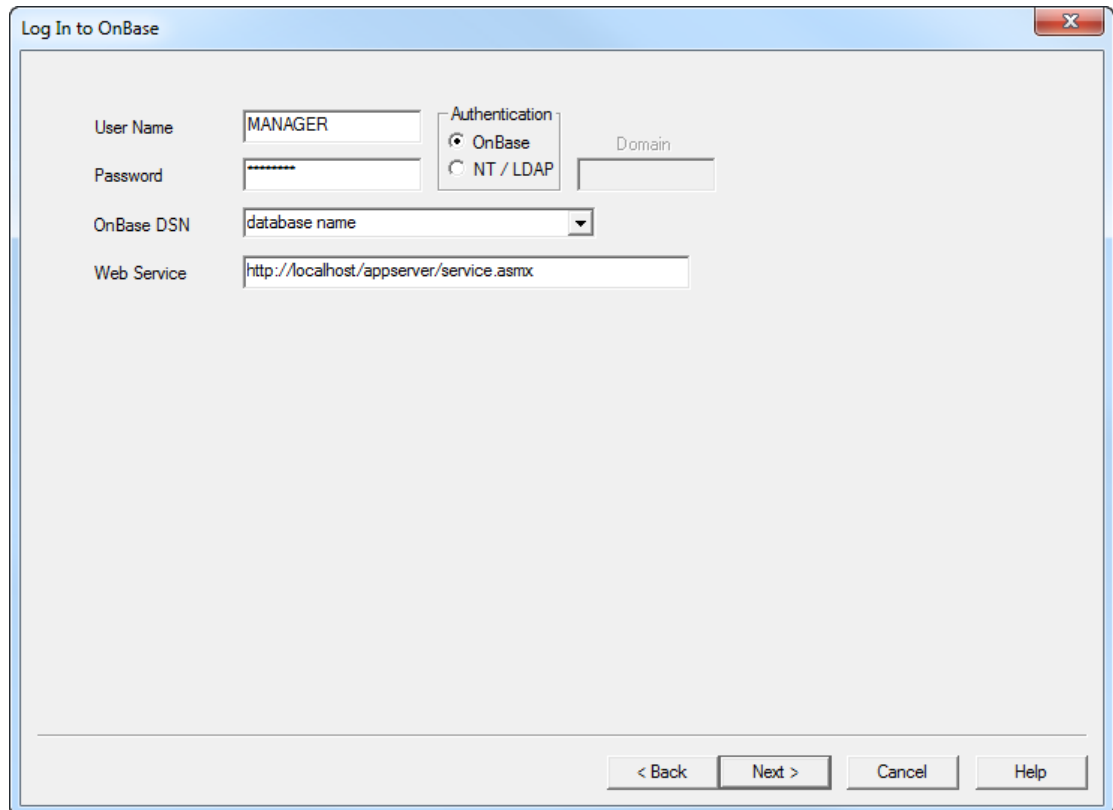
Using the **Hyland OnBase 13 Connector** as a destination for EXCHANGEit requires installation of Hyland OnBase 13.

Destination Setup for Hyland OnBase 13 Connector

Steps

- 1 Click the **Dest. Setup** tab.
- 2 Click **Configure Destination**. The **Select Destination Type** window is displayed.

- 3 Select **Hyland OnBase 13 Connector** and click **Next**. The **Log In to OnBase** window is displayed.



- 4 Enter the OnBase login information in the **User Name** and **Password** fields.
- 5 Select the **Authentication** method for connecting to OnBase:
 - **OnBase**: Log into OnBase using OnBase login information.
 - **NT/LDAP**: Log into OnBase using NT/LDAP login information. If using NT/LDAP authentication, enter the appropriate domain in the **Domain** field.
- 6 Select the OnBase data source from the **OnBase DSN** drop-down list. This list is populated by the ODBC connections that EXCHANGEit detects on your system.
- 7 Enter the **Web Service** path for your OnBase system.
- 8 Click **Next**. EXCHANGEit connects to the OnBase client. If OnBase is not already running, then it is automatically started. The **OnBase Document Types** window is displayed.
- 9 Select the OnBase document type and click **Finish**. The **Dest. Setup** tab is displayed again.

Destinations

If it is necessary to change the setup, click Edit Configuration and repeat the setup process again.

Destination Mappings for Hyland OnBase 13 Connector

Steps

- 1 Click the **Dest. Mappings** tab.
- 2 Map the **Source Fields** in the left pane to the appropriate destination or **Target Fields** in the right pane by dragging and dropping each source field into the associated target field.
OR
Click **Automap** to have EXCHANGEit automatically map fields. Source fields are mapped to target fields that have similar names.
- 3 Ensure that the **Type** and **Length** fields are correct.
- 4 If necessary, click **Purge Dest** to delete all records in the destination.
- 5 If any changes occurred in the source or destination, click **Refresh Fields** to update the Dest. Mappings tab.
The **Refresh Selection** window is displayed.
- 6 Select all applicable options and click **OK**:
 - Select the **Source Fields** check box if the source has changed.
The **Source Fields** grid is refreshed.
 - Select the **Destination Fields** check box if the destination has changed.
 - The **Target Fields** grid is refreshed.
- 7 If necessary, designate unique key fields in the destination. Key fields are fields that must contain a unique value in each record. Click the number in the **Target Fields** grid that contains the key field and click the **Key** button. A key symbol appears in the target field. Repeat this step for all key fields.
- 8 To unmap a source and target field, select the target field and click **Unmap**.
- 9 To unmap all target fields, click **Unmap All**.
- 10 To view a report of the current mappings, click **Report** and select where the report should be displayed. Options include:
 - **Screen**
The report is displayed on the screen in the **Report** window. Click **Close**.

- **File**

Specify the name and location to save the report and click **Save**. The file is saved as a .TXT file.

- **Printer**

Specify the print options and click **OK**.

The report displays all of the information within the target field grid, such as the source field mapped to the target field, type and length. Use the report to identify problems occurring in the destination and to view the results of the source-to-target field mappings.

Destination Options for Hyland OnBase 13 Connector

Most of the values specified in the Destination Setup wizard can be changed on the Dest. Options tab. Some fields might be displayed on this tab for informational purposes only and cannot be changed without deleting the destination and recreating it.

Option	Description
Error Threshold	Enter the number of errors that can occur while processing a job. When this limit is reached the job is stopped.
Duplicates	Provides functions for controlling how data is queried and validated in the OnBase database. These options decrease processing time and eliminate duplicate record errors between the source and OnBase database. Before EXCHANGEit transfers source data, a query is performed on the OnBase database. Source data is added to the end of the query results.
Query with Date Range	Select this check box to limit the number of query results by date. EXCHANGEit queries the OnBase database for records that are assigned an internal date that occurs within the start and end range of dates.
Start Date	Enter the date to start the search with in the field. This is required to run a query limited by date.
End Date	Leave this field blank to always use the current date as the end date. The current date is the date that the query is run. Enter a specific date to end the search within the End Date field.
Check for duplicate records	Select this check box to search for duplicated records between the source data and the OnBase database.
Replace the current image with a new image	Select this option to overwrite the existing image with the new image

Destinations

Option	Description
Append new image to old image (add a page)	Select this option to keep the existing image and add the new image.
Fields	If the Check for duplicate records check box is enabled, specify which fields to check for duplicate records. All of the fields in the document type are listed.

Destination Selection for Hyland OnBase 13 Connector

The Dest. Selection tab determines which records to transfer to the destination. VBScript can also be added to this specific destination from this tab. If implementing VBScript in all the destinations, do so in the **Job Scripts** tab. For more information, see Use VBScript (page [307](#)).

Steps

- 1 Click the **Dest Selection** tab.
- 2 Select one of the following options in the **Type of selection** section:
 - **Select All Records** - all records in the destination file are selected.
 - **Select First N records** - the first to the Nth records are selected, where N represents the total number of records to select. Indicate the number of records in the **Total** field.
 - **Range of records** - all records within the specified range are selected. Define the range in the **Start** and **End** fields.
 - **Every Nth record** - only each Nth record is selected, where N represents the multiple at which to select records. Define the Nth number in the **Nth** field and at which record to start the multiple count in the **Start At** field. For example, if the Nth number is 5 and the Start At number is 1, every record that is a multiple of 5 is selected. Therefore, records 5, 10, 15, and 20 are selected.
- 3 To add scripts to this specific destination, click **Expression**.
The **Expression Builder** window is displayed.
- 4 In the **Expression Builder** window, click **OK** when complete.
- 5 Click **Apply**.
- 6 Save the .XJB file.

AnyDoc DEPOSit as a Destination

DEPOSit is Hyland Software product that receives check data and images for processing. DEPOSit encrypts the data and creates a Check21 file (Cash letter).

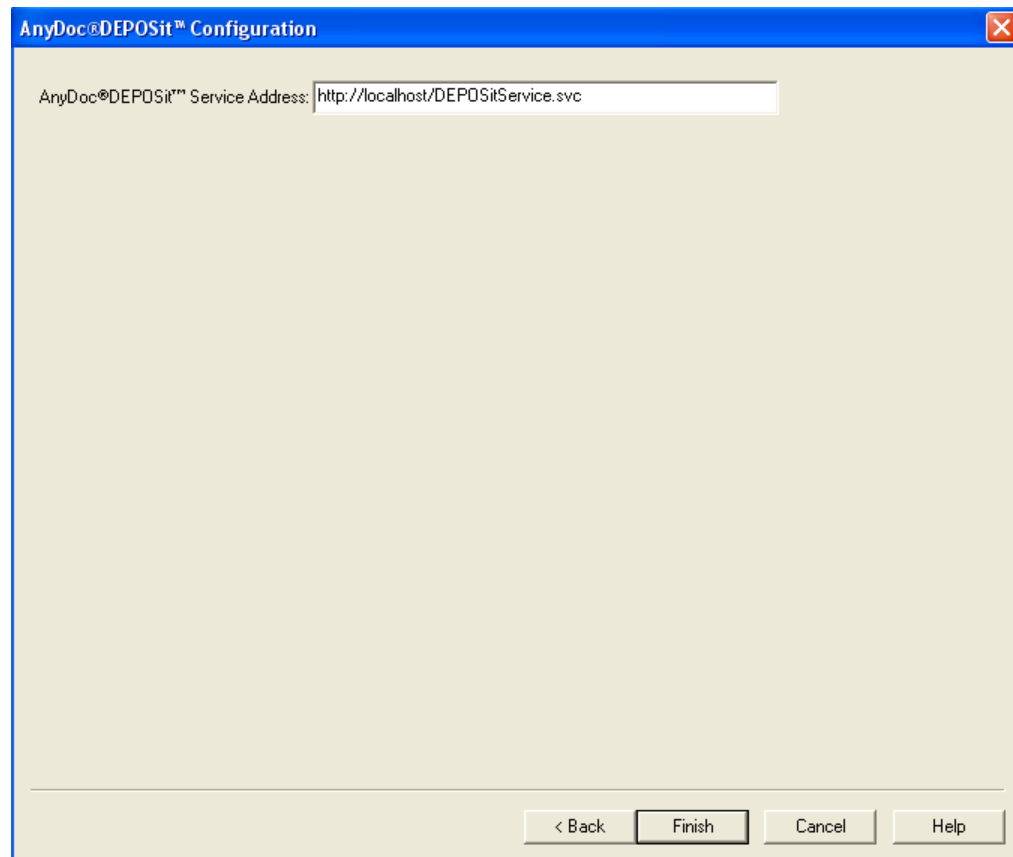
EXCHANGEit can integrate with DEPOSit by transferring data and images from OCR for AnyDoc to DEPOSit. In addition, Infiniworx can pass data to DEPOSit using the Export to EXCHANGEit Tool, which spawns an EXCHANGEit job.

Destination Setup for DEPOSit

Steps

- 1 Click the **Dest. Setup** tab.
- 2 Click **Configure Destination**. The **Select Destination Type** window is displayed.
- 3 Select **DEPOSit** and click **Next**.

The **DEPOSit Configuration** window is displayed.



Destinations

- 4 Enter the **DEPOSit Service Address**.
- 5 Click **Finish**.
The **Dest. Setup** tab is displayed.

Destination Mappings for DEPOSit

Steps

- 1 Click the **Dest. Mappings** tab.
- 2 Map the **Source Fields** in the left pane to the appropriate destination or **Target Fields** in the right pane by dragging and dropping each source field into the associated target field.
OR
Click **Automap** to have EXCHANGEit automatically map fields. Source fields are mapped to target fields that have similar names.
- 3 Ensure that the **Type** and **Length** fields are correct.
- 4 If necessary, click **Purge Dest** to delete all records in the destination.
- 5 If any changes occurred in the source or destination, click **Refresh Fields** to update the Dest. Mappings tab.
The **Refresh Selection** window is displayed.
- 6 Select all applicable options and click **OK**:
 - Select the **Source Fields** check box if the source has changed.
The **Source Fields** grid is refreshed.
 - Select the **Destination Fields** check box if the destination has changed.
- 7 The **Target Fields** grid is refreshed.
- 8 To view a report of the current mappings, click **Report** and select where the report should be displayed. Options include:
 - **Screen**
The report is displayed on the screen in the **Report** window. Click **Close**.
 - **File**
Specify the name and location to save the report and click **Save**. The file is saved as a .TXT file.
 - **Printer**
Specify the print options and click **OK**.

The report displays all of the information within the target field grid, such as the source field mapped to the target field, type and length. Use the report to identify problems occurring in the destination and to view the results of the source-to-target field mappings.

Destination Options for DEPOSit

Most of the values specified in the Destination Setup wizard can be changed on the Dest. Options tab. Some fields might be displayed on this tab for informational purposes only and cannot be changed without deleting the destination and recreating it.

Option	Description
DEPOSit Service Machine Address	Enter the location of the Service Machine that EXCHANGEit is to communicate with.
Error Threshold	Enter the number of errors that can occur while processing a job. When this limit is reached the job is stopped.

Destination Selection for DEPOSit

The Dest. Selection tab determines which records to transfer to the destination. VBScript can also be added to this specific destination from this tab. If implementing VBScript in all the destinations, do so in the **Job Scripts** tab. For more information, see Use VBScript (page [307](#)).

Steps

- 1 Click the **Dest Selection** tab.
- 2 Select one of the following options in the **Type of selection** section:
 - **Select All Records** - all records in the destination file are selected.
 - **Select First N records** - the first to the Nth records are selected, where N represents the total number of records to select. Indicate the number of records in the **Total** field.
 - **Range of records** - all records within the specified range are selected. Define the range in the **Start** and **End** fields.
 - **Every Nth record** - only each Nth record is selected, where N represents the multiple at which to select records. Define the Nth number in the **Nth** field and at which record to start the multiple count in the **Start At** field. For example, if the Nth number is 5 and the Start At number is 1, every record that is a multiple

Destinations

of 5 is selected. Therefore, records 5, 10, 15, and 20 are selected.

- 3 To add scripts to this specific destination, click **Expression**.
The **Expression Builder** window is displayed.
- 4 In the **Expression Builder** window, click **OK** when complete.
- 5 Click **Apply**.
- 6 Save the .XJB file.

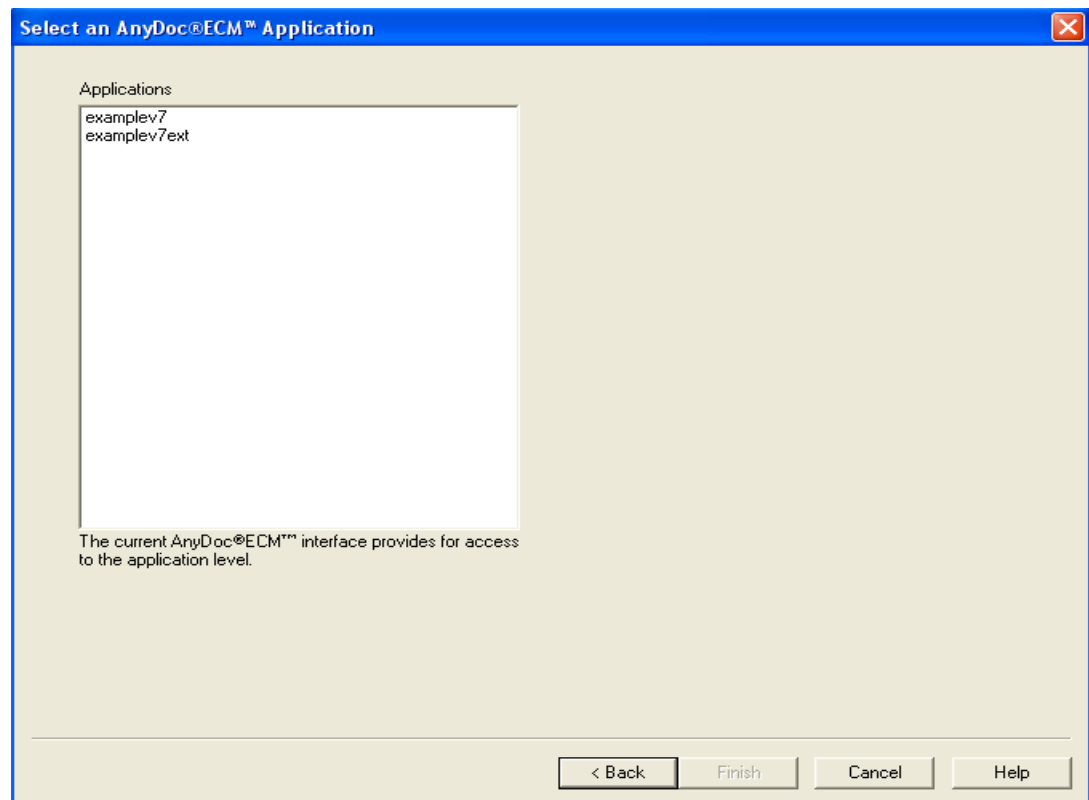
AnyDoc ECM as a Destination

Destination Setup for AnyDoc ECM

Steps

- 1 Click the **Dest. Setup** tab.
- 2 Click **Configure Destination**. The **Select Destination Type** window is displayed.
- 3 Select **AnyDoc ECM** and click **Next**. The **AnyDoc ECM Login and Server Setup** window is displayed.
- 4 Enter the **Server**.
- 5 Enter the login information in the **Username** and **Password** fields.

- 6 Click **Next**. The **Select An AnyDoc ECM Application** window is displayed.



- 7 Select an **Application** and click **Finish**. The **Dest. Setup** tab is displayed.

Destination Mappings for AnyDoc ECM

Steps

- 1 Click the **Dest. Mappings** tab.
- 2 Map the **Source Fields** in the left pane to the appropriate destination or **Target Fields** in the right pane by dragging and dropping each source field into the associated target field.
OR
Click **Automap** to have EXCHANGEit automatically map fields. Source field are mapped to target fields that have similar names.
- 3 Ensure that the **Type** and **Length** fields are correct.
- 4 If any changes occurred in the source or destination, click **Refresh Fields** to update the Dest. Mappings tab.
The **Refresh Selection** window is displayed.

Destinations

- 5 Select all applicable options and click **OK**:
 - Select the **Source Fields** check box if the source has changed.
The **Source Fields** grid is refreshed.
 - Select the **Destination Fields** check box if the destination has changed.
 - The **Target Fields** grid is refreshed.
- 6 If necessary, designate unique key fields in the destination. Key fields are fields that must contain a unique value in each record. Click the number in the **Target Fields** grid that contains the key field and click the **Key** button. A key symbol appears in the target field. Repeat this step for all key fields.
- 7 To unmap a source and target field, select the target field and click **Unmap**.
- 8 To unmap all target fields, click **Unmap All**.
- 9 To view a report of the current mappings, click **Report** and select where the report should be displayed. Options include:
 - **Screen**
The report is displayed on the screen in the **Report** window. Click **Close**.
 - **File**
Specify the name and location to save the report and click **Save**. The file is saved as a .TXT file.
 - **Printer**
Specify the print options and click **OK**.
The report displays all of the information within the target field grid, such as the source field mapped to the target field, type and length. Use the report to identify problems occurring in the destination and to view the results of the source-to-target field mappings.

Destination Options for AnyDoc ECM

Most of the values specified in the Destination Setup wizard can be changed on the Dest. Options tab. Some fields might be displayed on this tab for informational purposes only and cannot be changed without deleting the destination and recreating it.

Login

Option	Description
Username	Username used to log into ECM.

Option	Description
Password	Password used to log into ECM.
Server	The ECM Server Name.
Test Login	Click to connect to the specified ECM server.

Option	Description
Error Threshold	Enter the number of errors that can occur while processing a job. When this limit is reached the job is stopped.

Destination Selection for AnyDoc ECM

The Dest. Selection tab determines which records to transfer to the destination. VBScript can also be added to this specific destination from this tab. If implementing VBScript in all the destinations, do so in the **Job Scripts** tab. For more information, see Use VBScript (page [307](#)).

Steps

- 1 Click the **Dest Selection** tab.
- 2 Select one of the following options in the **Type of selection** section:
 - **Select All Records** - all records in the destination file are selected.
 - **Select First N records** - the first to the Nth records are selected, where N represents the total number of records to select. Indicate the number of records in the **Total** field.
 - **Range of records** - all records within the specified range are selected. Define the range in the **Start** and **End** fields.
 - **Every Nth record** - only each Nth record is selected, where N represents the multiple at which to select records. Define the Nth number in the **Nth** field and at which record to start the multiple count in the **Start At** field. For example, if the Nth number is 5 and the Start At number is 1, every record that is a multiple of 5 is selected. Therefore, records 5, 10, 15, and 20 are selected.
- 3 To add scripts to this specific destination, click **Expression**.
The **Expression Builder** window is displayed.
- 4 In the **Expression Builder** window, click **OK** when complete.
- 5 Click **Apply**.

Destinations

- 6 Save the .XJB file.

OCR for AnyDoc as a Destination

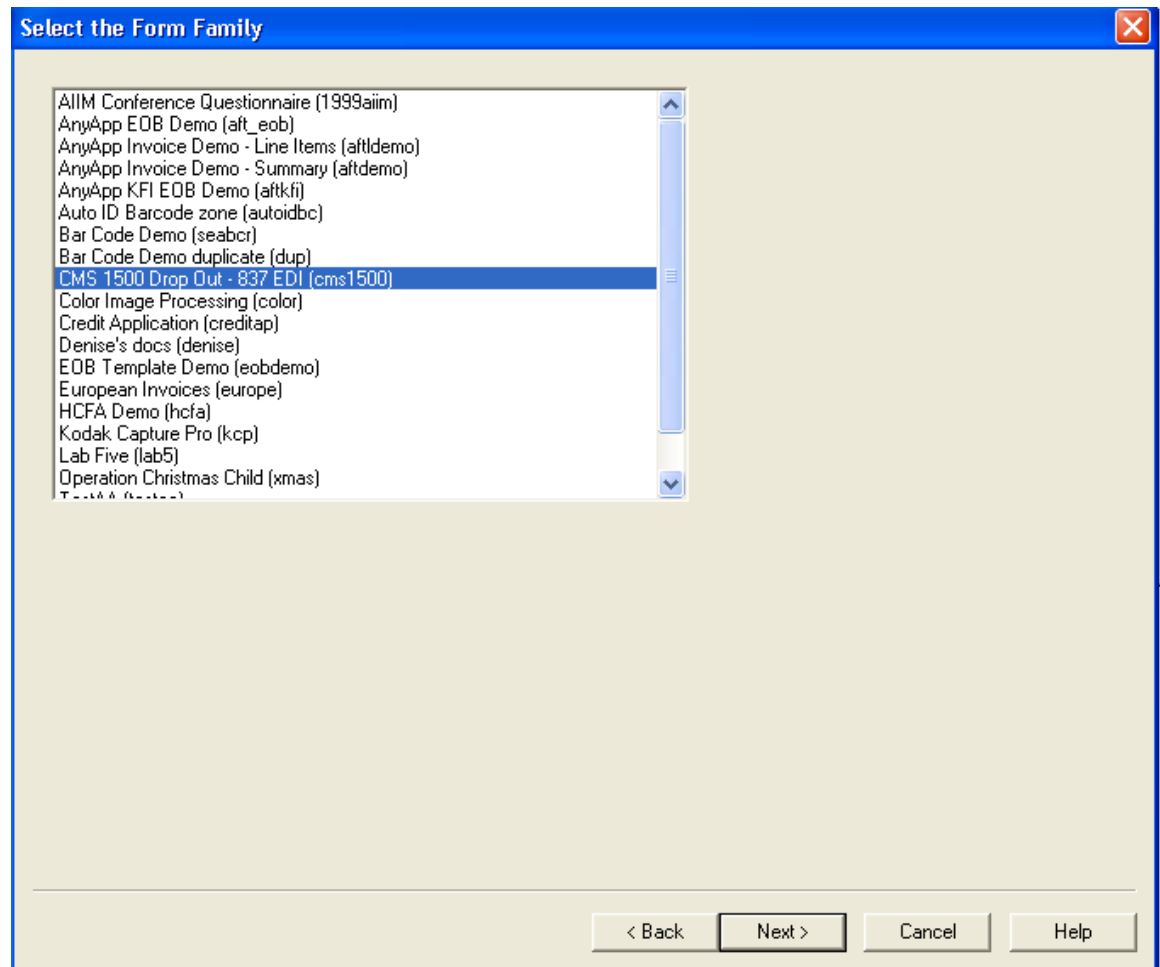
The OCR for AnyDoc destination is only available for EDI Sources.

Destination Setup for OCR for AnyDoc

Steps

- 1 Click the **Dest. Setup** tab.
- 2 Click **Configure Destination**. The **Select Destination Type** window is displayed.
- 3 Select **OCR for AnyDoc** and click **Next**.
The **Enter Your OCR for AnyDoc Control Path** window is displayed.
- 4 Enter the control path that is configured in OCR for AnyDoc and click **Next**.

The **Select A Form Family** window is displayed and lists all available Form Families.



- 5 Select the Form Family to receive the images and click **Next**.

The **Select The Template** window is displayed and lists all templates assigned to the selected Form Family.

- 6 Select a template.

- 7 Click **Finish**.

The **Dest. Setup** tab is displayed.

Destination Mappings for OCR for AnyDoc

Steps

- 1 Click the **Dest. Mappings** tab.

Destinations

- 2 Map the **Source Fields** in the left pane to the appropriate destination or **Target Fields** in the right pane by dragging and dropping each source field into the associated target field.
OR
Click **Automap** to have EXCHANGEit automatically map fields. Source field are mapped to target fields that have similar names.
- 3 Ensure that the **Type** and **Length** fields are correct.
- 4 If necessary, click **Purge Dest** to delete all records in the destination.
- 5 If any changes occurred in the source or destination, click **Refresh Fields** to update the Dest. Mappings tab.
The **Refresh Selection** window is displayed.
- 6 Select all applicable options and click **OK**:
 - Select the **Source Fields** check box if the source has changed.
The **Source Fields** grid is refreshed.
 - Select the **Destination Fields** check box if the destination has changed.
The **Target Fields** grid is refreshed.
- 7 To view a report of the current mappings, click **Report** and select where the report should be displayed. Options include:
 - **Screen**
The report is displayed on the screen in the **Report** window. Click **Close**.
 - **File**
Specify the name and location to save the report and click **Save**. The file is saved as a .TXT file.
 - **Printer**
Specify the print options and click **OK**.The report displays all of the information within the target field grid, such as the source field mapped to the target field, type and length. Use the report to identify problems occurring in the destination and to view the results of the source-to-target field mappings.

Destination Options for OCR for AnyDoc

Most of the values specified in the Destination Setup wizard can be changed on the Dest. Options tab. Some fields might be displayed on this tab for informational purposes only and cannot be changed without deleting the destination and recreating it.

OCR for AnyDoc Control Path

Option	Description
OCR for AnyDoc Control Path	The Control Path set up in OCR for AnyDoc.

Send To

Option	Description
Form Family	Use the browse button to select the form family to receive the images.
Template	Use the browse button to select the template to receive the images.

Options

Option	Description
Skip OCR for AnyDoc Quality Assurance Phase	Select this check box to skip the QA phase in OCR for AnyDoc.
Job Identifier	Enter the ID that will be used as the Scan Station Identifier in OCR for AnyDoc.
Assign Verify Work To	Select this check box and select a group to pre-assign Verify work to. If a group is not selected here, this can be done in OCR for AnyDoc.
Error Threshold	Enter the number of errors that can occur while processing a job. When this limit is reached the job is stopped.

Destinations

Destination Selection for OCR for AnyDoc

The Dest. Selection tab determines which records to transfer to the destination. VBScript can also be added to this specific destination from this tab. If implementing VBScript in all the destinations, do so in the **Job Scripts** tab. For more information, see Use VBScript (page [307](#)).

Steps

- 1 Click the **Dest Selection** tab.
- 2 Select one of the following options in the **Type of selection** section:
 - **Select All Records** - all records in the destination file are selected.
 - **Select First N records** - the first to the Nth records are selected, where N represents the total number of records to select. Indicate the number of records in the **Total** field.
 - **Range of records** - all records within the specified range are selected. Define the range in the **Start** and **End** fields.
 - **Every Nth record** - only each Nth record is selected, where N represents the multiple at which to select records. Define the Nth number in the **Nth** field and at which record to start the multiple count in the **Start At** field. For example, if the Nth number is 5 and the Start At number is 1, every record that is a multiple of 5 is selected. Therefore, records 5, 10, 15, and 20 are selected.
- 3 To add scripts to this specific destination, click **Expression**.
The **Expression Builder** window is displayed.
- 4 In the **Expression Builder** window, click **OK** when complete.
- 5 Click **Apply**.
- 6 Save the .XJB file.

Access Database as a Destination

Information collected from forms or other documents can be stored in an Access database table.

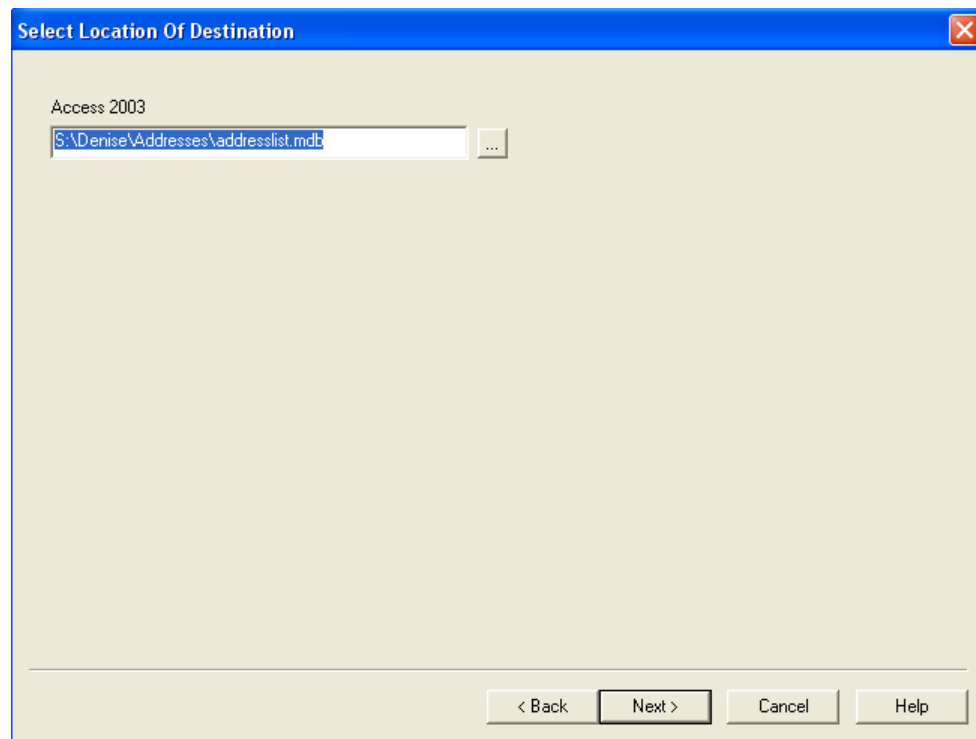
Destination Setup for an Access Database


When the destination is Access Database .MDB File, you must select an existing table.

Steps

- 1 Click the **Dest. Setup** tab.
- 2 Click **Configure Destination**. The **Select Destination Type** window is displayed.
- 3 Select **Access Database** and select the applicable Access version.
- 4 Click **Next**.

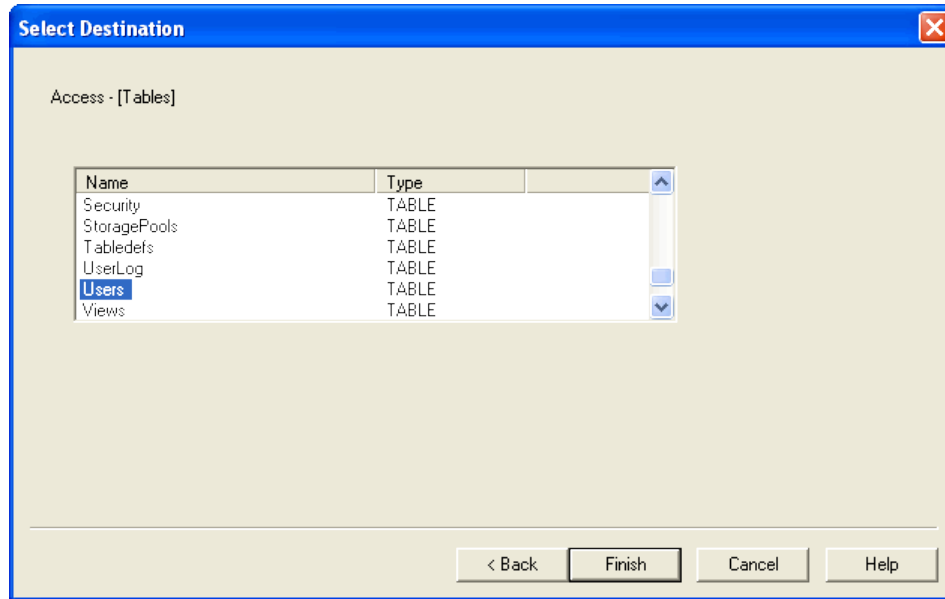
The **Select Location Of Destination** window is displayed.



- 5 Click the **Browse** button, , and map to the Access database.
- 6 Click **Next**.

Destinations

The **Select Destination** window is displayed.



- 7 Select the table to use as a destination and click **Finish**. The Dest. Setup tab is displayed

Destination Mappings for an Access Database

Steps

- 1 Click the **Dest. Mappings** tab.
- 2 Click the **View Dest** button to confirm the connection to the destination and view the information that was transferred to the destination. This option is helpful to ensure that you have selected the appropriate settings for the destination and that the information is formatted in the correct manner. A list of records appears below the Dest. Mappings tab.
- 3 Map the **Source Fields** in the left pane to the appropriate destination or **Target Fields** in the right pane by dragging and dropping each source field into the associated target field.
OR
Click **Automap** to have EXCHANGEit automatically map fields. Source field are mapped to target fields that have similar names.
- 4 Ensure that the **Type** and **Length** fields are correct.
- 5 If necessary, click **Purge Dest** to delete all records in the destination.
- 6 If any changes occurred in the source or destination, click **Refresh Fields** to update

the Dest. Mappings tab.

The **Refresh Selection** window is displayed.

7 Select all applicable options and click **OK**:

- Select the **Source Fields** check box if the source has changed.

The **Source Fields** grid is refreshed.

- Select the **Destination Fields** check box if the destination has changed.

- The **Target Fields** grid is refreshed.

8 If necessary, designate unique key fields in the destination. Key fields are fields that must contain a unique value in each record. Click the number in the **Target Fields** grid that contains the key field and click the **Key** button. A key symbol appears in the target field. Repeat this step for all key fields.

9 To unmap a source and target field, select the target field and click **Unmap**.

10 To unmap all target fields, click **Unmap All**.

11 To view a report of the current mappings, click **Report** and select where the report should be displayed. Options include:

- **Screen**

The report is displayed on the screen in the **Report** window. Click **Close**.

- **File**

Specify the name and location to save the report and click **Save**. The file is saved as a .TXT file.

- **Printer**

Specify the print options and click **OK**.

The report displays all of the information within the target field grid, such as the source field mapped to the target field, type and length. Use the report to identify problems occurring in the destination and to view the results of the source-to-target field mappings.

Destination Options for an Access Database

Most of the values specified in the Destination Setup wizard can be changed on the Dest. Options tab. Some fields might be displayed on this tab for informational purposes only and cannot be changed without deleting the destination and recreating it.

Destinations

Option	Description
DB Path	Displays the database being linked to. To change the database, click Change and select another database. The new database must contain the same tables as the previous database. If the database contains the same fields, the mappings are retained.
Error Threshold	Enter the number of errors that can occur while processing a job. When this limit is reached the job is stopped.
Check For Duplicate Record Before Adding	Select this check box to search for duplicate records. The key fields are checked for duplicate records prior to adding records from the source to the destination. Clear this check box to add the record to the table without checking for duplicate records first. Depending on the database, an error may occur if duplicate field values are found and the field was a primary key or does not allow duplicate values.
If Duplicate, Update Existing Record	Select this check box to update the table with the new record. Clear this check box to keep the original field value in the table.
Purge Destination Before Adding New Records	Select this check box to delete records from the table before adding new records. The table is purged only if new records are added.
Purge Destination Before Running Job	Select this check box to delete any records from the table before processing the scheduled job. Records are purged from the table regardless of whether new records are added.
Check Fields for Data	Select this check box to check mapped source fields for an absence of data. EXCHANGEit generates an error message if the mapped fields are empty.

Destination Selection for an Access Database

The Dest. Selection tab determines which records to transfer to the destination. VBScript can also be added to this specific destination from this tab. If implementing VBScript in all the destinations, do so in the **Job Scripts** tab. For more information, see Use VBScript (page [307](#)).

Steps

- 1 Click the **Dest Selection** tab.
- 2 Select one of the following options in the **Type of selection** section:
 - **Select All Records** - all records in the destination file are selected.

- **Select First N records** - the first to the Nth records are selected, where N represents the total number of records to select. Indicate the number of records in the **Total** field.
 - **Range of records** - all records within the specified range are selected. Define the range in the **Start** and **End** fields.
 - **Every Nth record** - only each Nth record is selected, where N represents the multiple at which to select records. Define the Nth number in the **Nth** field and at which record to start the multiple count in the **Start At** field. For example, if the Nth number is 5 and the Start At number is 1, every record that is a multiple of 5 is selected. Therefore, records 5, 10, 15, and 20 are selected.
- 3 To add scripts to this specific destination, click **Expression**.
The **Expression Builder** window is displayed.
 - 4 In the **Expression Builder** window, click **OK** when complete.
 - 5 Click **Apply**.
 - 6 Save the .XJB file.

DAO Database/Jet 4 Drivers as a Destination

A Data Access Objects (DAO) database consists of a library of objects with their associated properties and methods that make it easier to access a relational database.

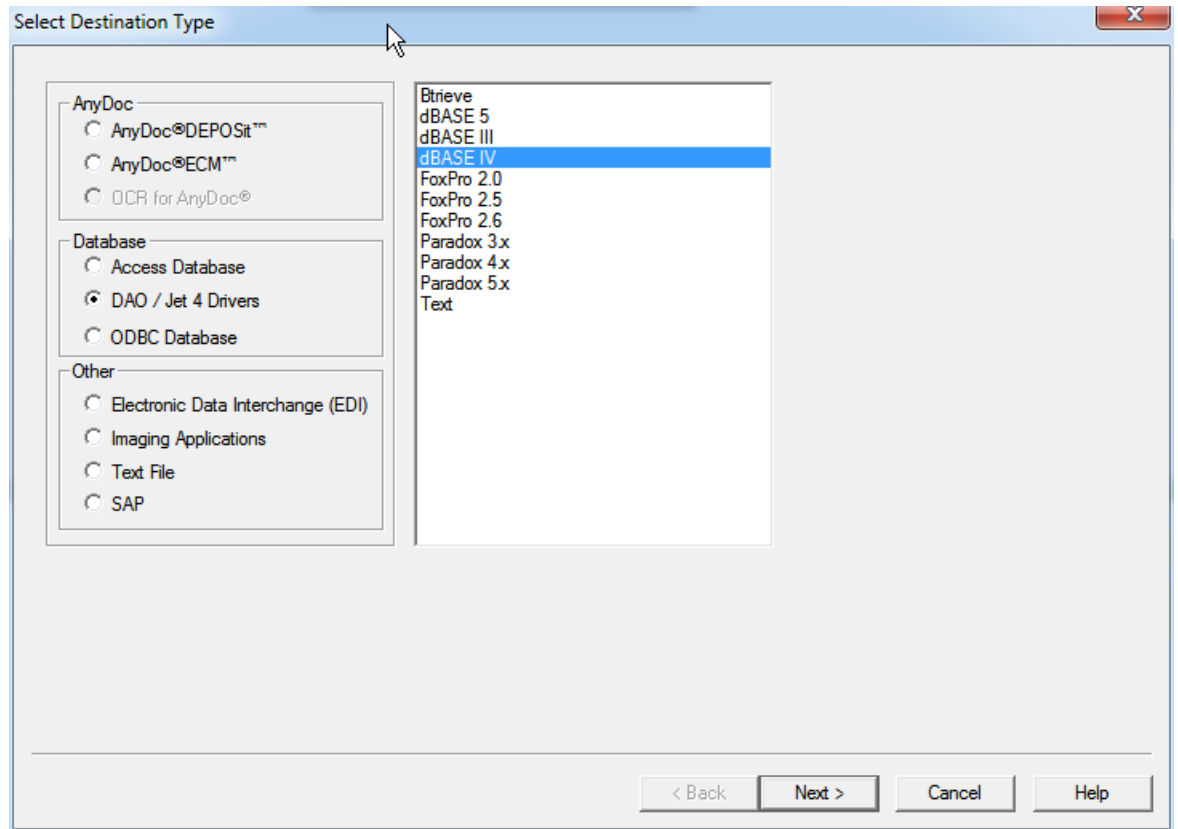
Destination Setup for a DAO Database

Steps

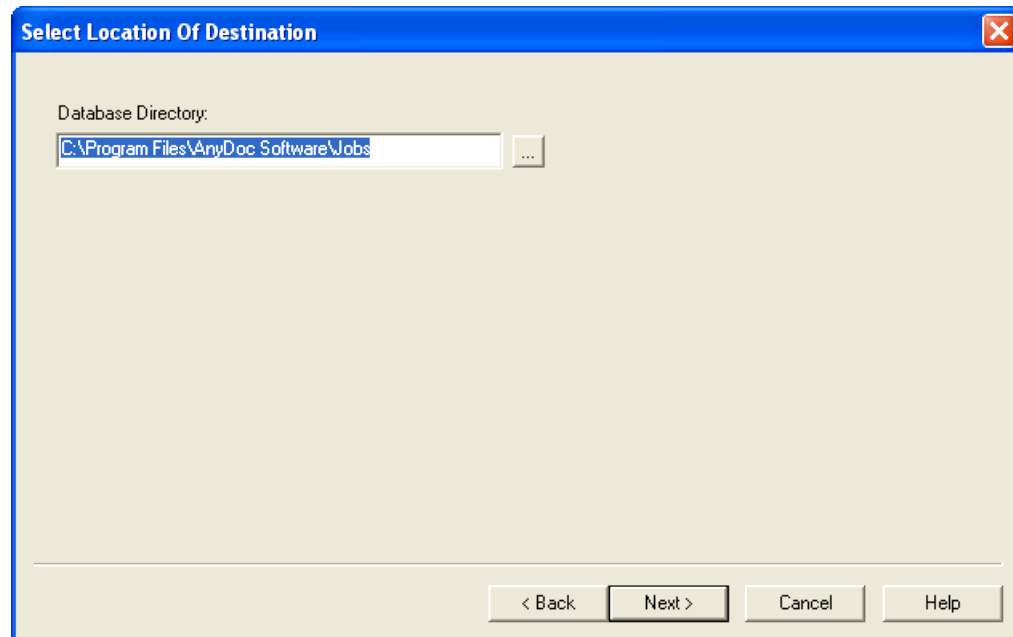
- 1 Click the **Dest. Setup** tab.
- 2 Click **Configure Destination**. The **Select Destination Type** window is displayed.


Destinations

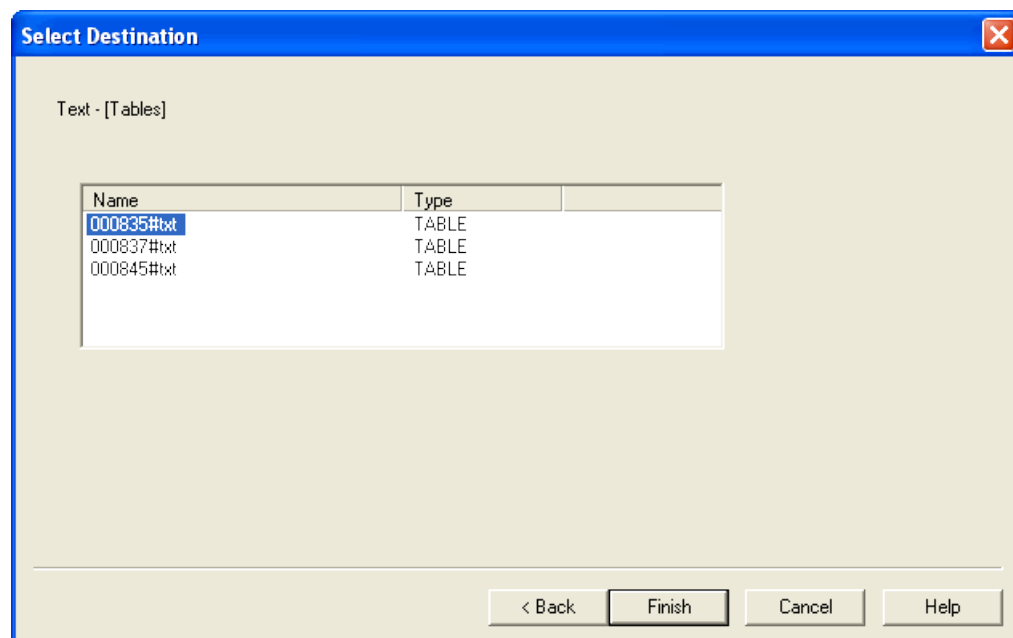
- 3 Select **DAO / Jet 4 Drivers**. A field appears on the right side of the window displaying different database options.



- 4 Select the DAO database type and click **Next**. The Select Location Of Destination window is displayed.



- 5 Click the **Browse** button, , and map to the DAO database directory.
- 6 Click **Next**. The Select Destination window is displayed.



- 7 Select the table to use as a destination and click **Finish**. The Dest. Setup tab is

Destinations

displayed

Destination Mappings for a DAO Database

Steps

- 1 Click the **Dest. Mappings** tab.
- 2 Click the **View Dest** button to confirm the connection to the destination and view the information that was transferred to the destination. This option is helpful to ensure that you have selected the appropriate settings for the destination and that the information is formatted in the correct manner. A list of records appears below the Dest. Mappings tab.
- 3 Map the **Source Fields** in the left pane to the appropriate destination or **Target Fields** in the right pane by dragging and dropping each source field into the associated target field.
OR
Click **Automap** to have EXCHANGEit automatically map fields. Source field are mapped to target fields that have similar names.
- 4 Ensure that the **Type** and **Length** fields are correct.
- 5 If necessary, click **Purge Dest** to delete all records in the destination.
- 6 If any changes occurred in the source or destination, click **Refresh Fields** to update the Dest. Mappings tab.
The **Refresh Selection** window is displayed.
- 7 Select all applicable options and click **OK**:
 - Select the **Source Fields** check box if the source has changed.
The **Source Fields** grid is refreshed.
 - Select the **Destination Fields** check box if the destination has changed.
The **Target Fields** grid is refreshed.
- 8 If necessary, designate unique key fields in the destination. Key fields are fields that must contain a unique value in each record. Click the number in the **Target Fields** grid that contains the key field and click the **Key** button. A key symbol appears in the target field. Repeat this step for all key fields.
- 9 To unmap a source and target field, select the target field and click **Unmap**.
- 10 To unmap all target fields, click **Unmap All**.
- 11 To view a report of the current mappings, click **Report** and select where the report should be displayed. Options include:

- **Screen**

The report is displayed on the screen in the **Report** window. Click **Close**.

- **File**

Specify the name and location to save the report and click **Save**. The file is saved as a .TXT file.

- **Printer**

Specify the print options and click **OK**.

The report displays all of the information within the target field grid, such as the source field mapped to the target field, type and length. Use the report to identify problems occurring in the destination and to view the results of the source-to-target field mappings.

Destination Options for a DAO Database

Most of the values specified in the Destination Setup wizard can be changed on the Dest. Options tab. Some fields might be displayed on this tab for informational purposes only and cannot be changed without deleting the destination and recreating it.

Option	Description
Error Threshold	Enter the number of errors that can occur while processing a job. When this limit is reached the job is stopped.
Check For Duplicate Record Before Adding	Select this check box to search for duplicate records. The key fields are checked for duplicate records prior to adding records from the source to the destination. Clear this check box to add the record to the table without checking for duplicate records first. Depending on the database, an error may occur if duplicate field values are found and the field was a primary key or does not allow duplicate values.
If Duplicate, Update Existing Record	Select this check box to update the table with the new record. Clear this check box to keep the original field value in the table.
Purge Destination Before Adding New Records	Select this check box to delete records from the table before adding new records. The table is purged only if new records are added.

Destinations

Option	Description
Purge Destination Before Running Job	Select this check box to delete any records from the table before processing the scheduled job. Records are purged from the table regardless of whether new records are added.
Check Fields for Data	Select this check box to check mapped source fields for an absence of data. EXCHANGEit generates an error message if the mapped fields are empty.

Destination Selection for a DAO Database

The Dest. Selection tab determines which records to transfer to the destination. VBScript can also be added to this specific destination from this tab. If implementing VBScript in all the destinations, do so in the **Job Scripts** tab. For more information, see Use VBScript (page [307](#)).

Steps

- 1 Click the **Dest Selection** tab.
- 2 Select one of the following options in the **Type of selection** section:
 - **Select All Records** - all records in the destination file are selected.
 - **Select First N records** - the first to the Nth records are selected, where N represents the total number of records to select. Indicate the number of records in the **Total** field.
 - **Range of records** - all records within the specified range are selected. Define the range in the **Start** and **End** fields.
 - **Every Nth record** - only each Nth record is selected, where N represents the multiple at which to select records. Define the Nth number in the **Nth** field and at which record to start the multiple count in the **Start At** field. For example, if the Nth number is 5 and the Start At number is 1, every record that is a multiple of 5 is selected. Therefore, records 5, 10, 15, and 20 are selected.
- 3 To add scripts to this specific destination, click **Expression**.
The **Expression Builder** window is displayed.
- 4 In the **Expression Builder** window, click **OK** when complete.
- 5 Click **Apply**.
- 6 Save the .XJB file.

ODBC Database as a Destination

A common EXCHANGEit destination is SQL Server. To set up a SQL Server connection, use the ODBC Database destination.

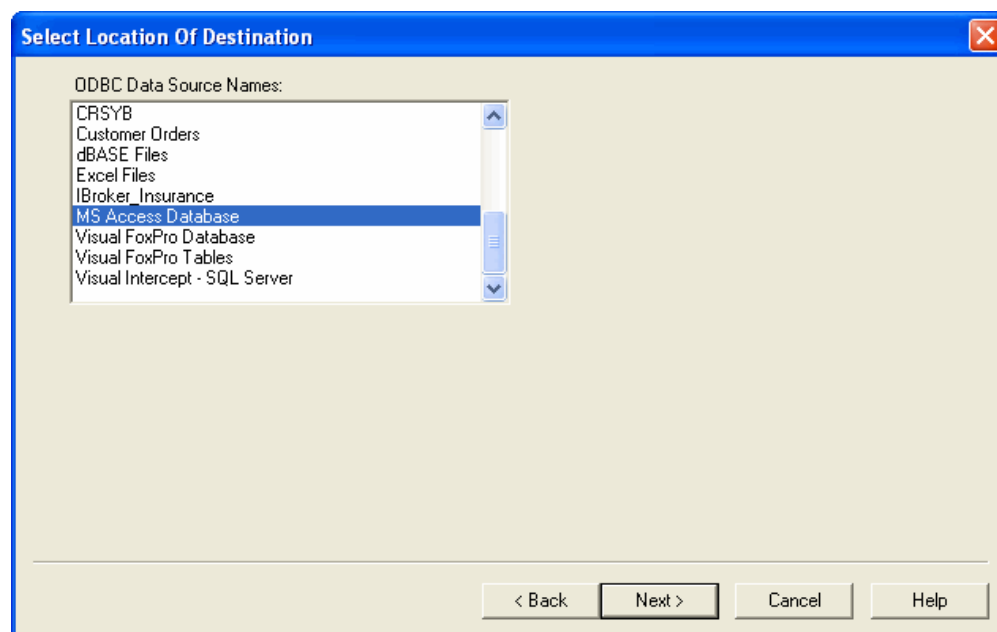
Destination Setup for an ODBC Database

When the destination is ODBC Database, you can select an existing table.

Steps

- 1 Click the **Dest. Setup** tab.
- 2 Click **Configure Destination**. The **Select Destination Type** window is displayed.
- 3 Select **ODBC Database** and click **Next**.

The **Select Location Of Destination** window is displayed.

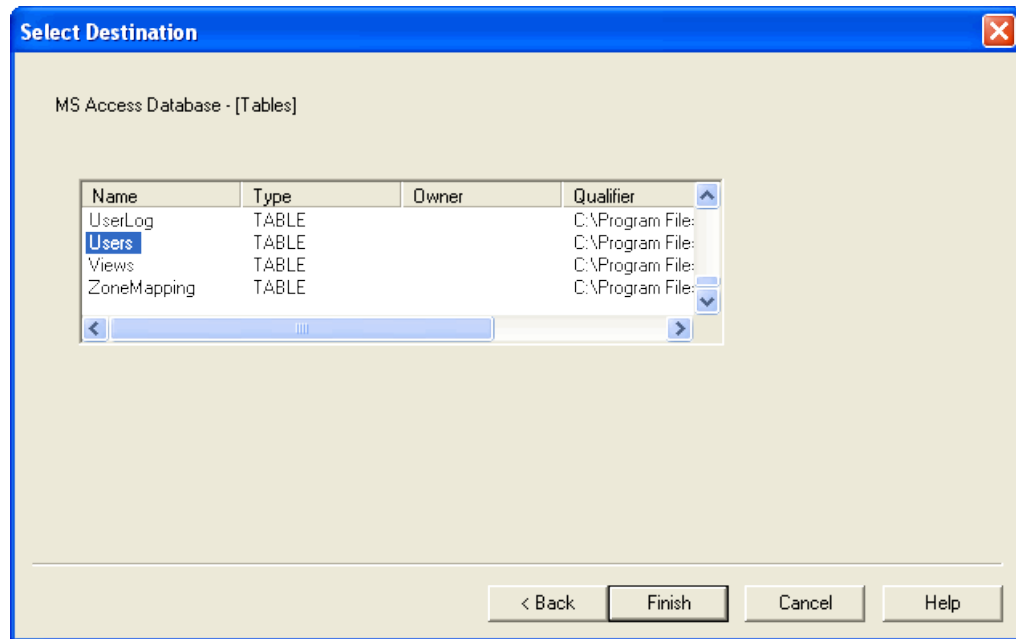


- 4 Select a data source from the **ODBC Data Source Names** list and click **Next**. The **Select Destination** window is displayed. Depending on the data source selected, you may also be required to select the database.



If a particular data source name does not appear, configure a connection using Windows Administrative Tools (**Management | Configure ODBC Data Source**).

Destinations



- 5 Select the table to use as a destination and click **Finish**.

The **Dest. Setup** tab is displayed.

Destination Mappings for an ODBC Database

When updating destination fields, if a field is not mapped then it will not be updated. Only mapped fields are updated and overwritten with current data.

Steps

- 1 Click the **Dest. Mappings** tab.
- 2 Click the **View Dest** button to confirm the connection to the destination and view the information that was transferred to the destination. This option is helpful to ensure that you have selected the appropriate settings for the destination and that the information is formatted in the correct manner. A list of records appears below the Dest. Mappings tab.
- 3 Map the **Source Fields** in the left pane to the appropriate destination or **Target Fields** in the right pane by dragging and dropping each source field into the associated target field.
OR
Click **Automap** to have EXCHANGEit automatically map fields. Source field are mapped to target fields that have similar names.
- 4 Ensure that the **Type** and **Length** fields are correct.

- 5 If necessary, click **Purge Dest** to delete all records in the destination.
- 6 If any changes occurred in the source or destination, click **Refresh Fields** to update the Dest. Mappings tab.
The **Refresh Selection** window is displayed.
- 7 Select all applicable options and click **OK**:
 - Select the **Source Fields** check box if the source has changed.
The **Source Fields** grid is refreshed.
 - Select the **Destination Fields** check box if the destination has changed.
The **Target Fields** grid is refreshed.
- 8 If necessary, designate unique key fields in the destination. Key fields are fields that must contain a unique value in each record. Click the number in the **Target Fields** grid that contains the key field and click the **Key** button. A key symbol appears in the target field. Repeat this step for all key fields.
- 9 To unmap a source and target field, select the target field and click **Unmap**.
- 10 To unmap all target fields, click **Unmap All**.
- 11 To view a report of the current mappings, click **Report** and select where the report should be displayed. Options include:
 - **Screen**
The report is displayed on the screen in the **Report** window. Click **Close**.
 - **File**
Specify the name and location to save the report and click **Save**. The file is saved as a .TXT file.
 - **Printer**
Specify the print options and click **OK**.The report displays all of the information within the target field grid, such as the source field mapped to the target field, type and length. Use the report to identify problems occurring in the destination and to view the results of the source-to-target field mappings.

Destination Options for an ODBC Database

Most of the values specified in the Destination Setup wizard can be changed on the Dest. Options tab. Some fields might be displayed on this tab for informational purposes only and cannot be changed without deleting the destination and recreating it.

Option	Description
DSN	Displays the database being linked to. To change the database, click Change and select the correct database. If the database contains the same fields, the mappings will be retained.
User ID	The User ID used to log into the database.
No Password	Select this check box if a password is not required.
Password	The password used to log into the database.
Error Threshold	Enter the number of errors that can occur while processing a job. When this limit is reached the job is stopped.
Check For Duplicate Record Before Adding	Select this check box to search for duplicate records. The key fields are checked for duplicate records prior to adding records from the source to the destination. Clear this check box to add the record to the table without checking for duplicate records first. Depending on the database, an error may occur if duplicate field values are found and the field was a primary key or does not allow duplicate values.
If Duplicate, Update Existing Record	Select this check box to update the table with the new record. Clear this check box to keep the original field values in the table if duplicates are found.
Purge Destination Before Adding New Records	Select this check box to delete records from the table before adding new records. The table is purged only if new records are added.
Purge Destination Before Running Job	Select this check box to delete any records from the table before processing the scheduled job. Records are purged from the table regardless of whether new records are added.
Check Fields for Data	Select this check box to check mapped source fields for an absence of data. EXCHANGEit generates an error message if the mapped fields are empty.
Allow Nulls in Numeric Types	Select this check box to prevent null fields from being filled with 0 values. The field is left blank and the value is not set.

Destination Selection for an ODBC Database

The Dest. Selection tab determines which records to transfer to the destination. VBScript can also be added to this specific destination from this tab. If implementing VBScript in all the destinations, do so in the **Job Scripts** tab. For more information, see Use VBScript (page [307](#)).

Steps

- 1 Click the **Dest Selection** tab.
- 2 Select one of the following options in the **Type of selection** section:
 - **Select All Records** - all records in the destination file are selected.
 - **Select First N records** - the first to the Nth records are selected, where N represents the total number of records to select. Indicate the number of records in the **Total** field.
 - **Range of records** - all records within the specified range are selected. Define the range in the **Start** and **End** fields.
 - **Every Nth record** - only each Nth record is selected, where N represents the multiple at which to select records. Define the Nth number in the **Nth** field and at which record to start the multiple count in the **Start At** field. For example, if the Nth number is 5 and the Start At number is 1, every record that is a multiple of 5 is selected. Therefore, records 5, 10, 15, and 20 are selected.
- 3 To add scripts to this specific destination, click **Expression**.
The **Expression Builder** window is displayed.
- 4 In the **Expression Builder** window, click **OK** when complete.
- 5 Click **Apply**.
- 6 Save the .XJB file.

Electronic Data Interchange (EDI) File as a Destination

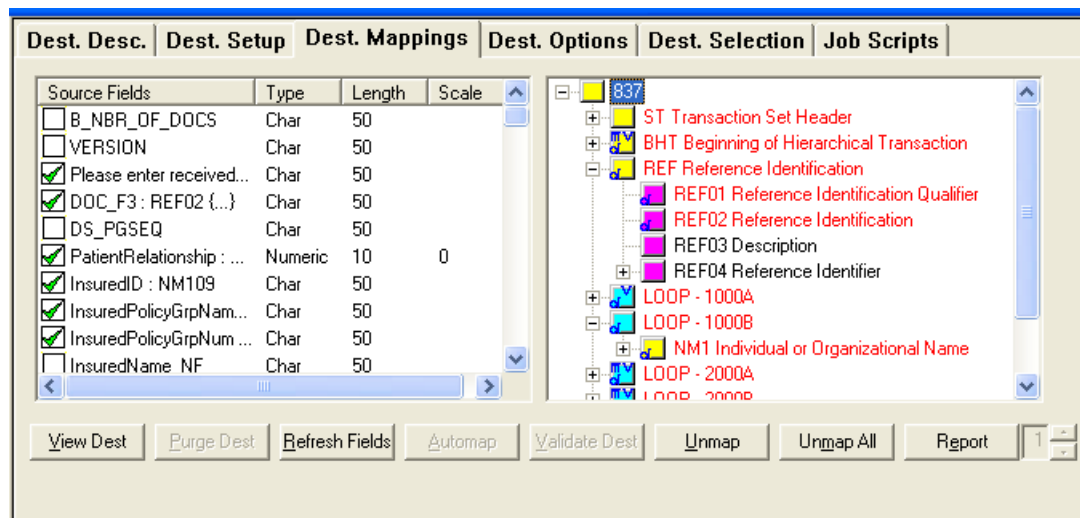
EXCHANGEit provides the following Electronic Data Interchange (EDI) files:

EDI File	File Name
810: Invoice Standards	810-X12-4010.SEF
834: Benefit Enrollment and Maintenance	834_005010X220A1.SemRef.SEF
835: Health Care Claim Payment/Advice	835_005010X221A1.SemRef.SEF
	835_X091A1.SEF

Destinations

EDI File	File Name
837: Health Care Claim Institutional	837_005010X223A2.SemRef.SEF 837_X096A1.SEF
837: Health Care Claim Professional	837_005010X222A1.SemRef.SEF 837_X098A1.SEF
	837_005010X224A2.SemRef.SEF
837: Dental	837_X097A1.SEF
997: Version 4010 transaction sets	997_004010.SEF
997: Version 5010 transaction sets	997_005010.SEF

Unlike other destinations in EXCHANGEit that are mapped from source fields using a source-to-target field grid, source fields are mapped to target fields in a "tree view." The tree view represents the hierarchical structure of the EDI destination.



Source fields are mapped to elements in the tree view.

Segments, elements and loops may be grouped to create multiple levels within the tree view.

- Click the + sign next to a node to expand the group.
- Click the - sign next to a node to collapse the group.
- Segments may contain a group of elements.
- Elements may contain a group of subelements.
- Loops may contain a group of segments and loops.




- The entire hierarchical structure of segments, elements, subelements and loops is the transaction set.

Mapped Nodes



An element is provided with a value from the source field it is mapped to, a VBScript or a default value. When a source field is mapped to a node, the name of the source field is appended to the node name, separated by a colon. For example, the PatientName_NF source field is mapped to the NM101 Name First node. The mapped node displays as NM101 Name First: PatientName_NF in the tree view.

Node Icon


Additionally, each node is assigned an icon representing the type of node and its relationship to the source field. See the table below for the list of possible icons and what each icon indicates.

Node Icon	Indication
	Element (field)
	Segment (record)
	Loop

Additionally, when a VBScript, mapped value or default value is assigned to the segment, element or loop, an indication of the property displays over the node icon. The indicator also displays on the parent node if any child nodes have properties assigned. The indicators are as follows:

Indicator	Property	Indication
v	VBScript	<p>A small "v" appears on the node icon when the node is attached to VBScript or contains a node that is attached to VBScript.</p> <p>For example, notice the "v" fixed to this element node . This icon indicates that the node or a child node has an attached VBScript.</p>
m	Mapped	<p>A small "m" appears on the node icon when the node is mapped to a source field or contains nodes that are mapped to a source field.</p> <p>For example, notice the "m" fixed to this element node . This icon indicates that the node or a child node is mapped to a source field and has an attached VBScript.</p>

Destinations

d	Default Value	<p>A small "d" appears on the node icon when the node is assigned a default value.</p> <p>For example, notice the "d" fixed to this loop node . This icon indicates that the node or a child node has a mapped and default value and has an attached VBScript.</p>
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Node Properties

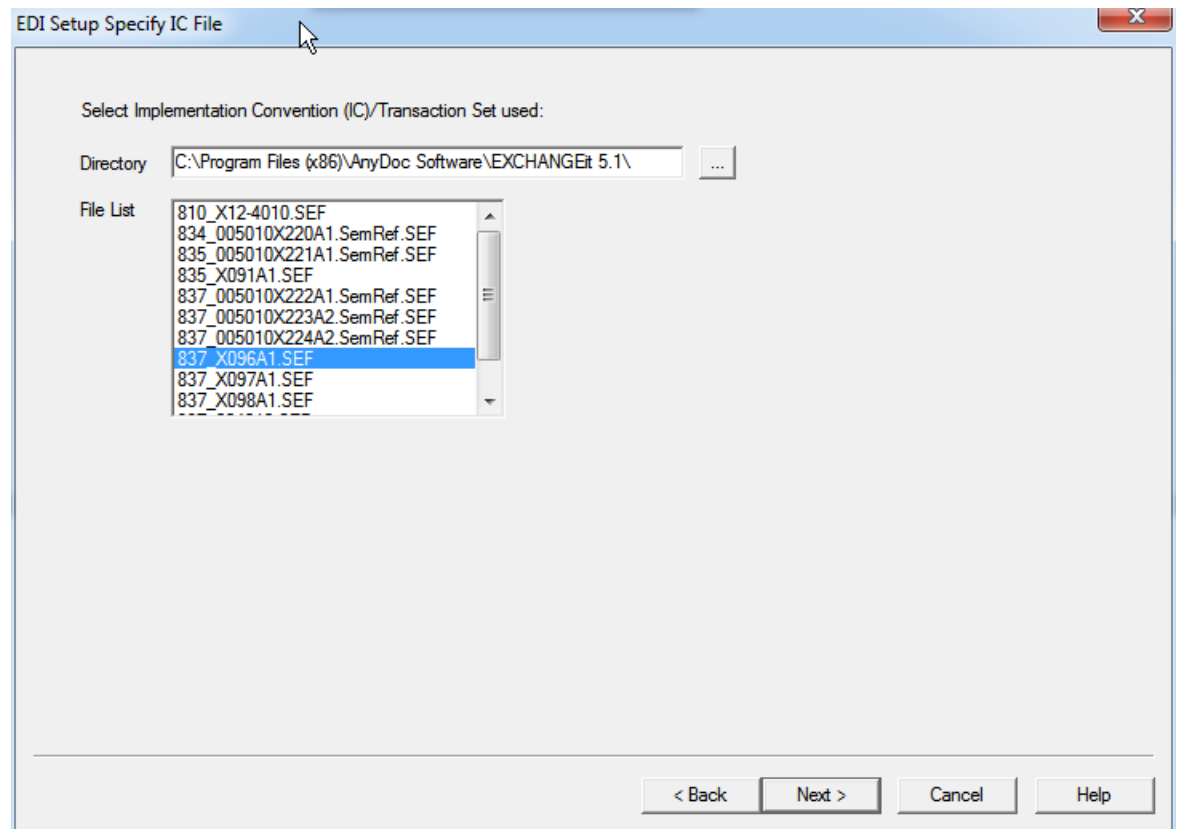
Functions are provided for each node by right-clicking the node in the tree view. The following options are available:


- **Set VBScript** - link the node to a VBScript using the Expression Builder. See Use VBScript (page [307](#)).
- **Search Nodes** - search for a specific node within the tree. See Search Nodes (page [144](#)).
- **Default Value** - assign a default value to the node. See Set a Default Value for the Node (page [145](#)).
- **Copy Loops** - copy and paste a floating loop to the same node. See Copy Node Loops (page [145](#)).
- **Properties** - view details regarding the node. See View Node Properties (page [146](#)).

Destination Setup for an EDI File**Steps**

- 1 Click the **Dest. Setup** tab.
- 2 Click **Configure Destination**. The **Select Destination Type** window is displayed.
- 3 Select **Electronic Data Interchange (EDI)** and click **Next**.

The **EDI Setup Specify IC File** window is displayed.



- 4 Click the **Browse** button, , and map to the location of the implementation convention (IC)/transaction set in the **Directory** field. The default location of the .SEF files is the EXCHANGEit installation directory.
- 5 Select the destination file from the **File List** field and click **Next**.

Destinations

The **EDI Setup Output File Name** window is displayed.

EDI Setup Output File Name

Folder Name: \\WKTERRIK1\AnyDoc Testing\ProductReg\data\prodreg.fof

Subdirectory Type: None

Name Output File By: File

Multiple Batches Per Output File

Date: YYMMDD File Name: Output.edi

Single Batch / Document Set Per Output File

File Assembly

☒ One File Per Batch

☐ One File Per Document Set

File Name Options

Prefix: Suffix: Extension: edi

< Back Finish Cancel Help

6 Select the Output File options (page [147](#)).

7 Click **Finish**.

The **Dest. Setup** tab is displayed.

Mapping EDI Destinations

Before you begin mapping the source fields to the transaction set, review the following information to ensure the integrity of your EDI output. Improper setup of segments or VBScript may lead to missing or incorrect information in the generated EDI file.

When a Segment Is Output

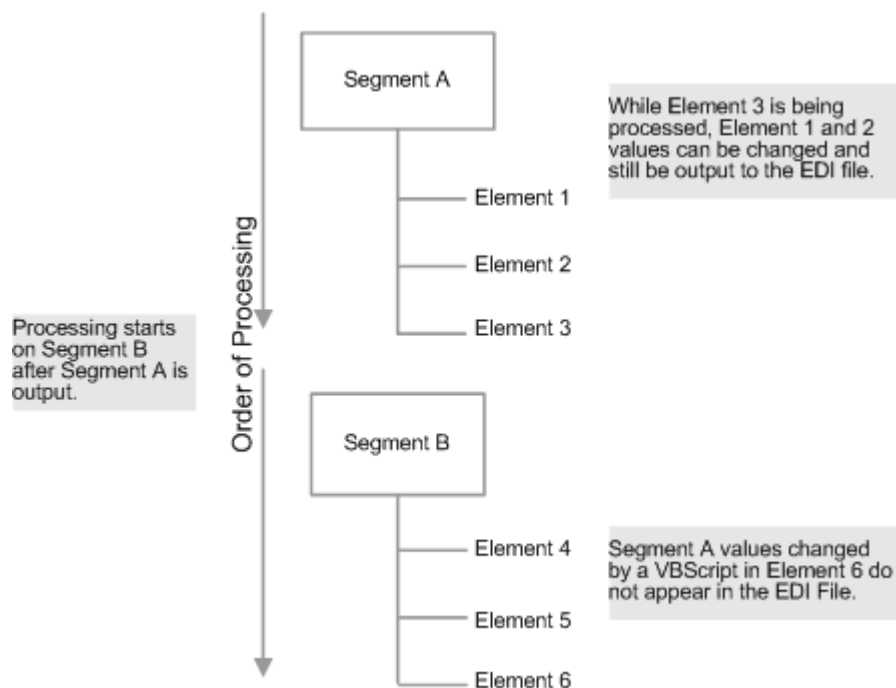
A segment consists of one or many elements. The elements determine whether the segment is generated to the EDI file, or "output."

The segment is output if at least one element contains a nonblank value. The value comes from any of three options: a mapped source field, default value or a VBScript. Additionally, the VBScript must have been run before this segment, not in or after this segment. See *VBScript* and *Blank versus Nonblank* below.

The segment is not output if all of the elements are blank.

The EDI file is created one segment at a time. Segments are processed and output in order. Changes to a Segment after it is output do not appear in the EDI file. Element values are modifiable in the Segment that is currently being processed or by a Segment processed in the future.

EDI Processing Diagram



Order of Operations

When an EDI job is run, values are assigned to elements within a given segment as each segment is processed. Three possible sources assign values to elements in the following order:

- 1 Source field. If the element is mapped, the value is transferred from the source field.
- 2 Default value. The default value is assigned on two occasions:
 - If the element is mapped, but the source field is blank.

Destinations

- If the element is not mapped, but is assigned a default value.

Nonblank values from the source field take precedence and overwrite the default value.

- 3 VBScript. Use VBScript to manipulate values in elements; however, the segment must already qualify as output (see *When a Segment is Output*). The VBScript is run when the element is being processed (see the EDI Processing diagram). It is not recommended to use VBScript to qualify a segment as output.

Blank versus Nonblank

An element is considered to have a "value" if the value is not blank. A value is nonblank if at least one character exists in the value and that character is not a space. This is important to consider because a segment is not output to the EDI file if all of the elements in the segment are blank. At least one element must be nonblank for the segment to output to the EDI file. The value cannot come from VBScript in the same segment because the segment is evaluated for nonblank values before the VBScript is run. As in the Order of Operations, condition one or two must be met for the segment to be output.

VBScript

VBScript is run in element order. For example, the VBScript on element 5 is run before the VBScript on element 6. It is also the last process to occur in a segment before the segment is output. VBScript is the last opportunity to assign a value to the elements. Conversely, VBScript is the last opportunity to remove values from elements to prevent the segment from being output, in which case all of its elements must be blank.

Changes made to elements using VBScript only appear in the EDI file if the changes were made to segments at or below the VBScript. Elements before the VBScript are already processed as output, so changes to the values are not reflected in the EDI file.

Headers and Trailers

The Transaction Set Header (ST) and Transaction Set Trailer (SE) are automatically output to the EDI file. Do not map source fields, set default values or assign VBScript to the ST and SE. Leave these nodes as is.

Repeating Loops

Loops are set to repeat a variable number of times. The criteria EXCHANGEit uses to repeat a loop is based on whether the values have changed since the last loop iteration. The first condition described below to contain a changed value "triggers" the loop to repeat:

- 1 In the first segment of the loop, the first two elements with mapped values and no VBScript attached are used as keys and checked for changed values.
- 2 If two mapped elements are not found, then required fields are used as keys and

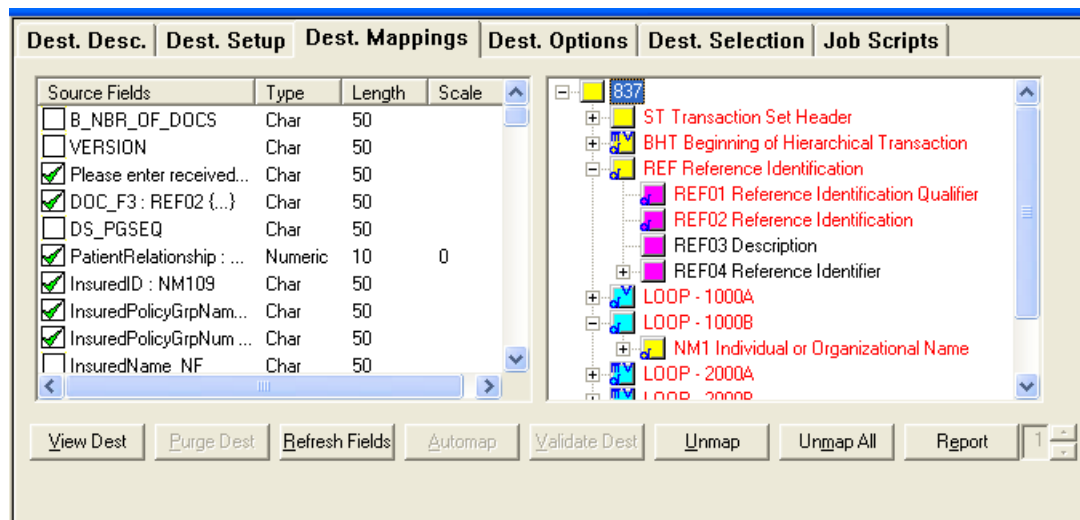
checked for changed values.


- 3 If no required fields are found, then the first element is used as a key and checked for changed values.
- 4 If a value has changed in a key since the last iteration, a new loop is triggered.

Destination Mappings for an EDI File

Steps

- 1 Click the **Dest. Mappings** tab.



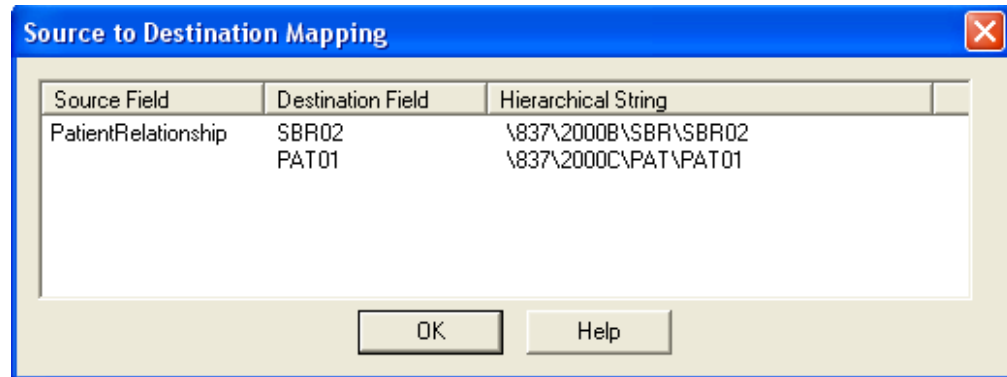
- 2 Click the **View Dest** button. A list of records appears below the Dest. Mappings tab.
 - If the View Dest button is clicked immediately after clicking the Run Job button, , the processed job displays automatically in the bottom pane.
 - If the View Dest button is clicked any other time, you must browse to the destination file.
- 3 Map the **Source Fields** in the left pane to the appropriate element in the right pane by dragging and dropping each source field into the associated element.

When an element is mapped, the following occurs:

- Source field name displays next to the element name, separated by a colon in the Target Fields pane.
- Element icon changes to include an M, which indicates that a source field is mapped to the element.
- Element's Properties menu displays Mapped: Yes.

Destinations

- Element name displays next to the source field name in the Source Fields pane. If the source field is mapped to more than one element, an ellipsis { . . . } displays next to the source field. Right-click the source field to display a list of all mapped elements.



- Right-click in the Source to Destination Mapping dialog to display a limited menu of the following options:
 - Set VBScript (page [143](#))
 - Default Value (page [145](#))
 - Properties (page [146](#))



Source fields cannot be mapped to the ST Transaction Set Header or SE Transaction Set Trailer nodes.

- 4 Click **Validate Dest** to validate that the resulting EDI file meets the implementation guidelines. See Validate the EDI Destination (page [152](#)).
- 5 If any changes occurred in the source or destination, click **Refresh Fields** to update the Dest. Mappings tab.
The **Refresh Selection** window is displayed.
- 6 Select all applicable options and click **OK**:
 - Select the **Source Fields** check box if the source has changed. The **Source Fields** grid is refreshed.
 - Select the **Destination Fields** check box if the .SEF file has changed. The transaction set is refreshed, all nodes are unmapped and all duplicated segments are removed. A warning message displays to confirm refreshing the transaction set.
 - Click **Ok** to refresh the grid(s) or **Cancel** to clear the action.
- 7 To unmap a source and target field, select the target field and click **Unmap**.

- 8 To unmap all target fields, click **Unmap All**.
- 9 To view a report of the current mappings, click **Report** and select where the report should be displayed. Options include:
 - **Screen**

The report is displayed on the screen in the **Report** window. Click **Close**.
 - **File**

Specify the name and location to save the report and click **Save**. The file is saved as a .TXT file.
 - **Printer**

Specify the print options and click **OK**.

The report displays all of the information within the target field grid, such as the source field mapped to the target field, type and length. Use the report to identify problems occurring in the destination and to view the results of the source-to-target field mappings.

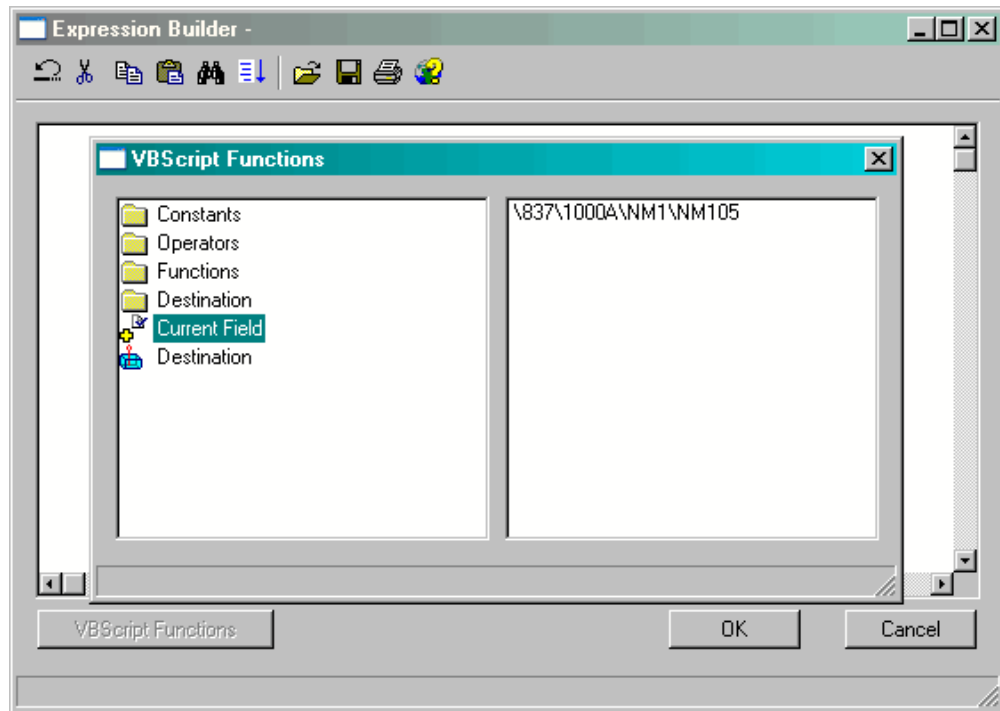
Add VBScript

VBScript can be linked to segment and element nodes. When the VBScript is linked, the node's icon changes to include a "V."

- 1 From the **Dest. Mappings** tab, right-click the node in which to link the VBScript.

Destinations

- 2 Select **Set VBScript**. The Expression Builder window is displayed.



- 3 Click the **VBScript Functions** button.
- 4 Click the Current Field icon to add the field name to the **Elements** pane.
- 5 Click the Destination icon in the **Object** pane. A list of functions appears in the **Elements** pane.
- 6 Double-click the function to add. The function is added to the **Code Entry** pane. See Use VBScript (page [307](#)).

Search Nodes

Since the tree view can contain many nodes at multiple levels, it may be helpful to perform a search to find a particular node within the tree view.


Steps

- 1 From the **Dest. Mappings** tab, right-click within the tree view and select **Search Nodes**.

The **Search for Tree Nodes** window is displayed.

- 2 Enter the name of the node to search for in the text box
OR

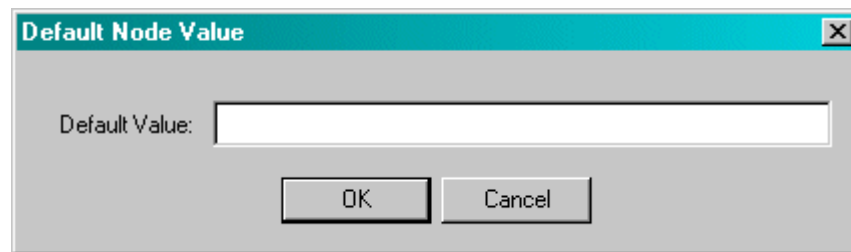
Select the name of the node from the drop down list. All nodes within the tree view are listed in the drop down list.

- 3 Click the **Browse** button, , or the **OK** button to perform the search. The node is located and selected in the tree view.
- 4 To close the Search for Tree Nodes window, click **OK**.

Set a Default Value for the Node

The option is given to assign a default value to a node. When running the job, the target field is filled with the default value unless another value is provided by the source field or by VBScript.

- 1 From the **Dest. Mappings** tab, right-click the node in which to assign a default value.
- 2 Select **Default Value**. The Default Node Value window is displayed.



- 3 Enter the value to default to the destination file in the **Default Value** field.
- 4 Click **OK** to close the window.

Copy Node Loops

Floating loops can be copied to another loop with the same name. The result is that the same loop occurs in more than one location within the transaction set. The following items are copied:

- Default value
- VBScript
- Map to source field

This feature is currently only available for the 837 transaction set and only loop 2300 can be copied. Additionally, loop 2300 can only be copied from loop 2000B to loop 2000C.

- 1 From the **Dest. Mappings** tab, right-click the node in which to copy.
- 2 Select **Copy Loops**.
The **Copy Loops** window is displayed. The **Copy From** field displays the location of the loop being copied and cannot be edited.
- 3 Scroll to and select the location in which to paste the copied loop in the **Copy To** field.

Destinations

- 4 Click **Paste** to copy the loop.
- 5 Click **Close** to close the window.

View Node Properties

- 1 From the **Dest. Mappings** tab, right-click the node in which to view properties.
- 2 Select **Properties**. The Properties window displays the following information:

Property	Indication
Name	Indicates the name that displays in the tree view that can be used by more than one node
Hierarchical Name	Indicates the internal, unique name assigned to only that node
Data Type	Indicates whether the node is a segment, element or loop
Repeats	Indicates how many times the node has been copied in the tree
Required Field	<div>Controlled by the Standard Exchange Format (.SEF) file and indicates whether a source field must be mapped to the node.</div> <ul style="list-style-type: none">• Yes indicates that the field is required and the node name displays in red text in the tree view• No indicates that the field is not required and the node name displays in black text in the tree view
Mapped	<div>Indicates whether a source field must be mapped to a node.</div> <ul style="list-style-type: none">• Yes indicates that the node is mapped• No indicates that the node is not mapped.
Script	<div>Indicates whether the node is linked to VBScript.</div> <ul style="list-style-type: none">• Yes indicates that the node is linked• No indicates that the node is not linked.
Default Value	Displays the assigned default value. See Set a Default Value for the Node (page 145).

- 1 Close the **Properties** window by clicking within the **Properties** window.

Destination Options for an EDI File

Most of the values specified in the Destination Setup wizard can be changed on the Dest. Options tab. Some fields might be displayed on this tab for informational purposes only and cannot be changed without deleting the destination and recreating it.

Option	Description
Folder Name	Specify the directory that the output file will be saved in.
Subdirectory Type	Select the Subdirectory Type from the drop-down list. Defaults to None. See Subdirectory Type below for available options.

Subdirectory Type

Option	Description
None	Select this option to save the output file in the specified File Folder without creating a subfolder.
Date	Select this option to create a subfolder using the current date in the yyymmdd format.
Batch No.	This option is only available if a batch number exists in the source file. Select this option to create a subfolder for each batch, using the batch number.
Batch Ctrl No.	This option is only available if a batch control number exists in the source file. Select this option to create a subfolder based on the batch control number.



Name Output File By

Option	Description
File	Names the output file by the name specified in the File Name field.
Date	Names the output file according to the date the job was processed.
Sequence Number	Names the output file by sequence number. The EDI.DAT controls the sequence number. See DAT Files (page 151).
Interchange Control Number (ISA13)	Names the output file with the same number occurring in data element ISA13.

Destinations

Option	Description
Input File Name (GTO, XML, or TXT)	Names the output file with the same file name as the source. The source file must be in either .GTO, .TXT, or .XML format.
Batch Number	Names the output file with the Batch Number
Batch Control Number	Names the output file with the Batch Control Number.

Multiple Batches per Output File

Option	Description
Date	When Date is selected in the Name Output File By field, click the Browse button,  , to select a date format from the Data Format Settings window. For more information, see Set Date Format Settings (page 92).
File Name	When File is selected in the Name Output File By field, click the Browse button,  , to map to an existing file.

Single Batch/Document Set Per Output File
File Assembly

Option	Description
One File Per Batch	Select this option to output one output file per batch. This is only available for destinations that output by input file, batch number or batch control number.
One File Per Document Set	Select this option to output one file per document set. Each claim in the EDI file is a document set. This is only available for destinations that output by input file, batch number or batch control number.

File Name Options

Option	Description
--------	-------------

Option	Description
Prefix and Suffix	<p>If the Name by Date or Name by Sequence Number option is selected, specify the file prefix and suffix that is added to the end of the file name.</p> <p>For example, the file prefix is "AAA-," the file suffix is "-BBB" and the file extension is ".EDI." The Name by Date radio button is selected and the date format setting is "YYMMDD." If the job is processed on June 10, 2004, the output file name is "AAA-040610-BBB.EDI."</p>
Extension	Specify a file extension for the output file. It can be any valid file extension. The default is EDI.

Option	Description
Advanced Options	These options are not available in the setup wizard and can only be changed in the Destination Options tab. For more information, see Advanced EDI Options (page 149).
User Data	These options are not available in the setup wizard and can only be changed in the Destination Options tab. For more information, see EDI User Data (page 150).
Start a new 837 claim for each document set	Select this check box so every OCR for AnyDoc document set begins a new claim in EDI.
Process Claim Trigger Field	Select the source field that will determine if the claim is processed; that field is processed if it has a value of "X", "Y", "T" or "1" (case insensitive).


Advanced EDI Options

The **EDI Advanced Options** window is displayed. The items defined in this screen default from the .SEF file.

These advanced settings are the most commonly used settings and should only be changed by individuals who have experience with EDI files.

Option	Description
Segments Terminator	Enter the character that indicates the end of a segment.
Elements Delimiter	Enter the character used to separate fields.

Destinations

Option	Description
Component Separator	Enter the character used to separate components.
Purge Destination Before Running Job	Select this check box to delete files from the destination directory before processing the job.
VBScript Debug	Select this check box to debug any VBScript that has been added. Select this check box only when performing test runs.
Turn Off Check Element	Select this check box to not verify that all elements have been included in the destination file. Clear this check box to verify that all elements are included within the destination file. It may be helpful to clear this check box when processing the first .EDI file. Because verification may increase processing time, it may not be feasible to perform the verification each time an .EDI file is processed.
Error Threshold	Enter the number of errors that can occur while processing a job.
Implementation Convention (IC)/Transaction Set	Click the Browse button,  , and map to a different .SEF file.

EDI User Data

EDI header and functional group settings are set on the EDI User Data window. For newly created jobs, the ISA and GS segments can now be mapped on the Destination Mappings tab rather than selected on the User Data window. The User Data window remains available for existing jobs and is visible when applicable.

It is recommended that only an EDI expert change the field entries.

Interchange Control Header

Option	Description
Authorization and Security Information Qualifiers	Select the new settings from the drop down list and enter the new qualifiers in the activated fields to the right of the drop down lists.
Interchange ID Qualifier (ISA05)	Select the new SenderID from the drop down list. A message displays asking if you want to replace the SenderID field entry. Click Yes to replace the SenderID with the new selection. Click No to clear the action.

Option	Description
Interchange ID Qualifier (ISA07)	Select the new ReceiverID from the drop down list. A message displays asking if you want to replace the ReceiverID field entry. Click Yes to replace the ReceiverID with the new selection. Click No to clear the action.
Starting Interchange Control Number (ISA13)	Enter the starting control number for data element ISA13. This number increments by one each time the job is run. It may be helpful to set the same starting number for both the Start Interchange Control Number (ISA13) and Starting Functional Group Control Number (GS06). This way both numbers would be synchronized with one another.
Acknowledgment Requested (ISA14)	Select either 0 for no or 1 for yes.
Usage Indicator (ISA15)	Select either P (Production) or T (Test).

Functional Group

Option	Description
Sender Department	Enter a new sender department
Receiver Department	Enter a new receiver department
Starting Functional Group Control Number (GS06)	Enter the starting control number for data element GS06. This number increments by one each time the job is run. Currently, one Functional Group Control Number is output per ISA file. It may be helpful to set the same starting number for both the Start Interchange Control Number (ISA13) and Starting Functional Group Control Number (GS06). This way both numbers would be synchronized with one another.

DAT Files

When configuring the Dest. Setup and Dest. Options tabs for an EDI and XML destination, four options are given to indicate how to name the output file:

- Specific file name
- Name by Date

Destinations

- Name by Sequence Number
- Name by Input File Name (.GTO and .TXT)

If the Name by Sequence Number option is selected, the destination file is named using a sequence number that increments by one each time a new destination file is created. The sequence number is stored in a DAT file.

- The EDI.DAT file stores the EDI destination sequence number.
- The XML.DAT file stores the XML destination sequence number.

The DAT file is automatically created in the EXCHANGEit root directory when the first EDI or XML destination file is created and the Name by Sequence Number option is enabled. This file tracks the sequence number and assigns the next sequence number to each subsequent EDI or XML destination file in increments of one. The sequence numbering stops at 999999 and restarts again at one.


Modify a DAT file to change the sequence number assigned to EDI or XML file names.

Modify the .DAT File


Steps

- 1 Ensure that at least one EDI or XML destination file has been processed with the **Dest. Options** tab | **Name by Sequence Number** option selected.
- 2 Open the EDI.DAT or XML.DAT file from the EXCHANGEit root directory using a text editor, such as Notepad. The DAT file displays the last sequence number assigned to the EDI or XML destination file.
- 3 Change the sequence number. For example,
 - To restart the sequence number at 1, change the sequence number to 0.
 - To restart the sequence number at 50, change the sequence number to 49.
- 4 Save and close the file.

Validate the EDI Destination

It is possible to validate the EDI file generated from EXCHANGEit to ensure that all of the implementation guidelines are met. Descriptions of the errors are generated in a report so that you can correct the EDI setup. To validate the destination, you must first run the job in production mode so that an EDI file is generated. After the source and EDI destination have been configured, click the **Run Job** button, , to run the job in production mode. The generated file is the file that EXCHANGEit validates.

To Validate the EDI Destination

- 1 Open the .XJB file that contains the EDI destination.
- 2 Run the job in production mode by clicking the **Run Job** button, .
- 3 From the **Dest. Mappings** tab, click the **Validate Dest** button. The output file is analyzed and a report is generated that lists any deviations from the standards.
- 4 Correct the errors and run the job again.
- 5 Continue this process until the standards agreed upon by your trading partners are met.

Errors may still be reported when validating the destination. Your trading partners' standards may be more or less stringent than EXCHANGEit standards. The true test to determine if the output is valid is whether the output file can be successfully processed by the receiver.

Destination Selection for an EDI File

The Dest. Selection tab determines which records to transfer to the destination. VBScript can also be added to this specific destination from this tab. If implementing VBScript in all the destinations, do so in the **Job Scripts** tab. For more information, see Use VBScript (page [307](#)).

Steps

- 1 Click the **Dest Selection** tab.
- 2 Select one of the following options in the **Type of selection** section:
 - **Select All Records** - all records in the destination file are selected.
 - **Select First N records** - the first to the Nth records are selected, where N represents the total number of records to select. Indicate the number of records in the **Total** field.
 - **Range of records** - all records within the specified range are selected. Define the range in the **Start** and **End** fields.
 - **Every Nth record** - only each Nth record is selected, where N represents the multiple at which to select records. Define the Nth number in the **Nth** field and at which record to start the multiple count in the **Start At** field. For example, if the Nth number is 5 and the Start At number is 1, every record that is a multiple of 5 is selected. Therefore, records 5, 10, 15, and 20 are selected.
- 3 To add scripts to this specific destination, click **Expression**.
The **Expression Builder** window is displayed.

Destinations

- 4 In the **Expression Builder** window, click **OK** when complete.
- 5 Click **Apply**.
- 6 Save the .XJB file.

Imaging Applications

EXCHANGEit can transfer data to a variety of imaging applications. Supported imaging applications are as follows:

Imaging Application	Interface Method
Computhink ViewWise 6.1 (page 155)	Import
DigiTech ImageSilo (page 163)	
DigiTech PaperVision Enterprise (page 167)	
DocuWare (page 171)	API
EMC Documentum ApplicationXtender (page 175)	API
HP TRIM Context 5.2 (page 182)	API
Hyland OnBase 13 Connector (page 187)	API
Hyland OnBase 9.2 (Obsolete) (page 187)	API
IBM DB2 Content Manager (page 192)	
IBM FileNET Panagon (page 195)	API, Import
Image Integration Systems DocuSphere (page 200)	
Marex Group FileBound On-Demand/On-Site (page 205)	
Microsoft SharePoint (page 209)	API
Open Text Alchemy (page 214)	API
Open Text eDOCS (Hummingbird) DM (page 217)	API
Oracle 10G Content DB (page 222)	API
Oracle Imaging and Process Management (I/PM) & Stellent IBPM (page 227)	API
Saperion Enterprise Content Management (page 231)	
Westbrook Technologies File Magic (page 236)	API
Westbrook Technologies Fortis (page 236)	API

Computhink ViewWise 6.1

EXCHANGEit integrates with ViewWise version 6.1 by Computhink, Inc. When ViewWise is the destination, a Batch Input File (.BIF) is created from the source data and then imported into ViewWise using the ViewWise Automated Input Processor. The .BIF file contains data from the source file and properties you define in the Dest. Setup and Dest. Options tabs for the ViewWise destination.

During setup, you define instructions for the Automated Input Processor to follow when importing the data, such as the Room/Cabinet/Drawer/Folder/Subfolder navigation path, whether to create the location automatically, what to do with images after they have been indexed and whether to append information to the end of matching documents.

The Dest. Options tab allows you to modify the instructions after setup.

Destination Setup for Computhink ViewWise 6.1

Steps

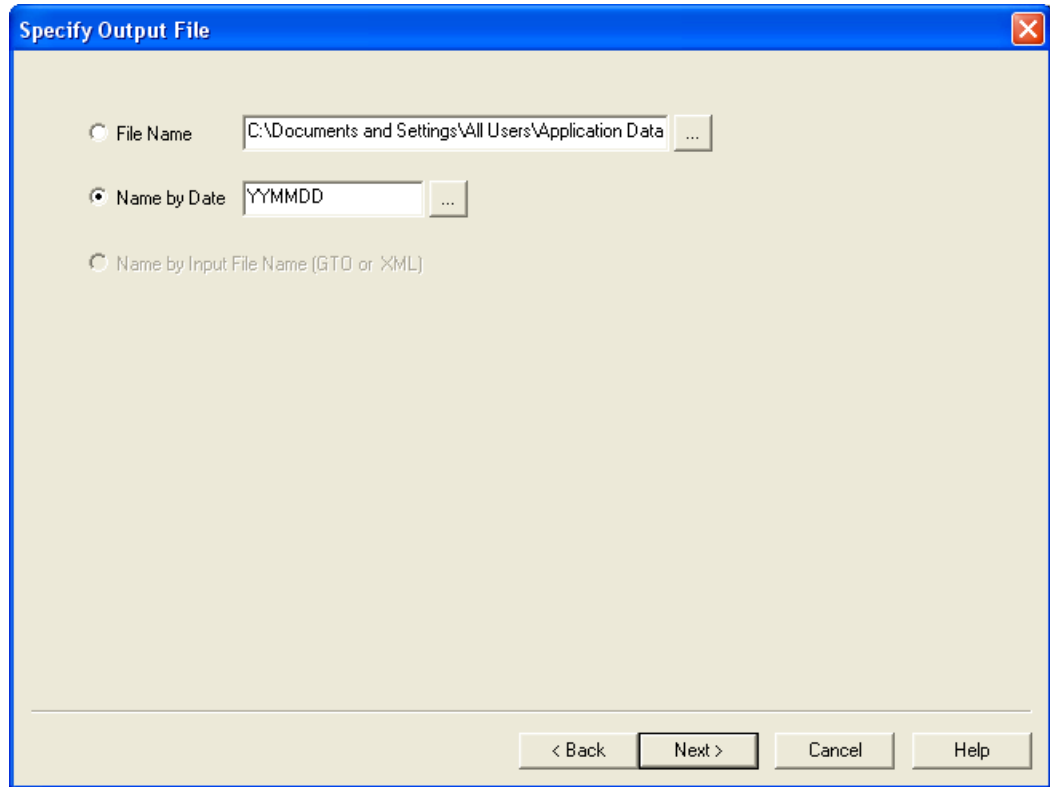
- 1 Click the **Dest. Setup** tab.
- 2 Click **Configure Destination**. The **Select Destination Type** window is displayed.
- 3 Select **Imaging Applications**. The supported imaging applications are displayed.


To assist in ensuring that the selected Imaging Application meets currently supported version requirements, the **View Certified Versions** button is available. Click to access additional information on the AnyDoc Software website regarding supported Imaging Applications.

- 4 Select **ViewWise6.1** and click **Next**.


Destinations

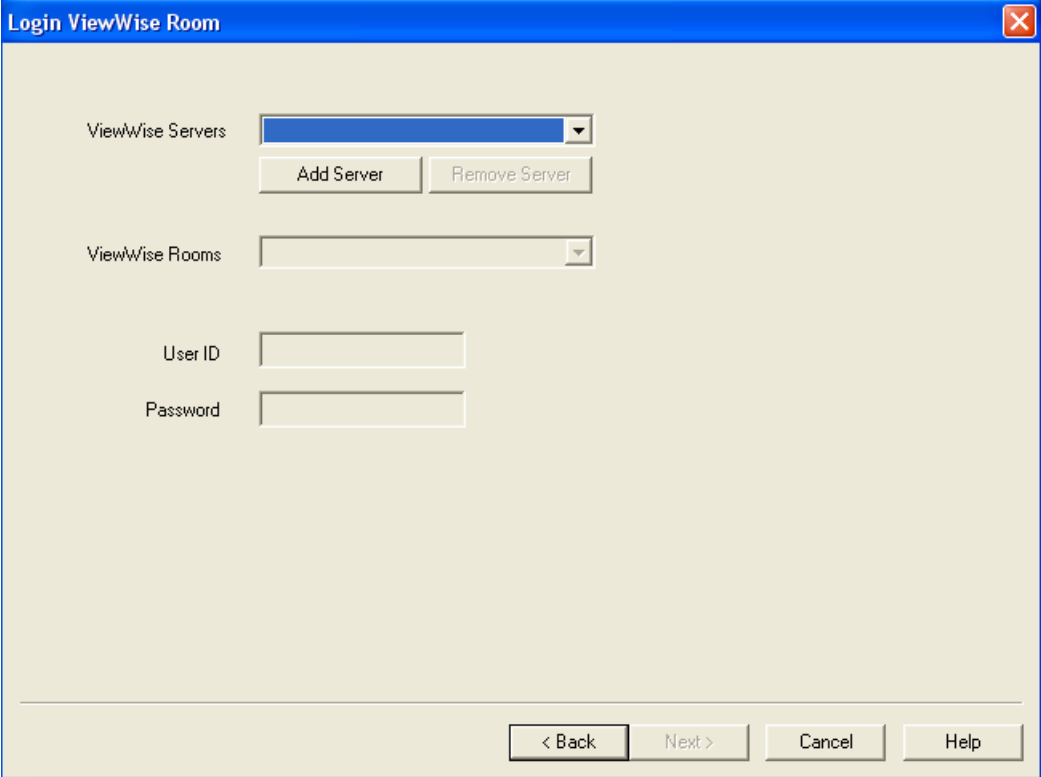
The **Specify Output File** window is displayed.



- 5 Indicate how to name the .BIF file. Options include:
 - **File Name** - names the output file by the name specified in this field or click the **Browse** button, , and map to an existing file. The file must end in a .BIF extension.
 - **Name by Date** - names the output file according to the date the job was processed.
 - **Name by Input File Name (GTO or XML)** - names the output file with the same file name as the source (but with the .TXT extension).
- 6 Click **Next**.

The **Login ViewWise Room** window is displayed.

 EXCHANGEit must be able to connect to the ViewWise Server to continue. Otherwise, no servers or rooms are available.



The dialog box titled "Login ViewWise Room" has a blue title bar with a close button. The main area is light beige. It contains the following elements:

- ViewWise Servers:** A dropdown menu with a blue bar and a downward arrow. Below it are two buttons: "Add Server" and "Remove Server".
- ViewWise Rooms:** A dropdown menu with a light beige bar and a downward arrow.
- User ID:** A text input field.
- Password:** A text input field.
- Navigation buttons:** At the bottom right, there are four buttons: "< Back", "Next >", "Cancel", and "Help".

- 7 Select the **ViewWise Servers** to connect to.

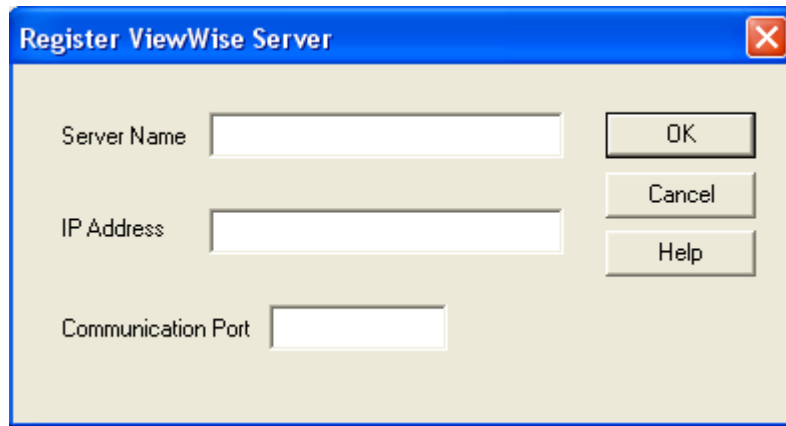
OR

If the server to log into is not listed in the **ViewWise Server** drop down list, register an existing ViewWise server:

- a) Click **Add Server**.

Destinations

The Register ViewWise Server window is displayed.

A screenshot of the 'Register ViewWise Server' dialog box. The dialog has a blue title bar with the text 'Register ViewWise Server' and a red close button. The main area is light beige and contains three text input fields: 'Server Name', 'IP Address', and 'Communication Port'. To the right of these fields are three buttons: 'OK', 'Cancel', and 'Help'.

- b) Enter any descriptive name for the ViewWise server in the **Server Name**. Any name can be entered.
- c) Enter the exact **IP Address** to the ViewWise server in which to connect.
- d) Enter the exact **Communication Port** to the ViewWise server in which to connect.
- e) Click **OK**.

The new ViewWise server connection and associated rooms are now available in the Login ViewWise Rooms dialog.

- 8 Select the room to log into from the **ViewWise Rooms** drop down list. All rooms available in the selected ViewWise server are listed.
- 9 Enter the **User ID** and **Password** used to connect to the server.
- 10 Click **Next**.

The **Select ViewWise Options** window is displayed.

- 11 Select the document type to associate with the documents from the **Select Doc Type** drop down list.

When the document type is selected, EXCHANGEit reconnects with the ViewWise server and displays the index field names of the document type in the Dest. Mappings tab. The index field names can then be mapped to the source fields.

- 12 Select the **Room/Cabinet/Drawer/Folder/Subfolders** in which to store the documents in the ViewWise database.



The Room and Cabinet must already exist on the ViewWise server. The Drawer, Folders and Subfolders can be added.

- 13 Enter the location to save the **Comment File**. The comment file is a plain text file that holds up to 8000 characters. The content of the comment file is entered in the

ViewWise Document Comment field.

- 14 From the **create_location** drop down list, select TRUE to create the folder and subfolder if they do not exist; otherwise, select FALSE to only create the document if the folder and subfolder already exist.
- 15 From the **append** drop down list, select TRUE to append the images to a document that matches the location, document type, index fields and index field values; otherwise, select FALSE to force the creation of a new document (even if a matching document already exists).
- 16 From the **delete_image** drop down list, select TRUE to delete the image after it has been indexed in ViewWise; otherwise, select FALSE to keep the images after they have been indexed.
- 17 Click **Finish**.

Destination Mappings for Computhink ViewWise 6.1

When mapping source fields to a ViewWise destination, you are mapping the source fields to document type indices.

Steps

- 1 Click the **Dest. Mappings** tab.
- 2 Click the **View Dest** button to confirm the connection to the destination and view the information that was transferred to the destination. This option is helpful to ensure that you have selected the appropriate settings for the destination and that the information is formatted in the correct manner. A list of records appears below the Dest. Mappings tab.
- 3 Map the **Source Fields** in the left pane to the appropriate destination or **Target Fields** in the right pane by dragging and dropping each source field into the associated target field.
- 4 Ensure that the **Type** and **Length** fields are correct.
- 5 If any changes occurred in the source or destination, click **Refresh Fields** to update the Dest. Mappings tab.
The **Refresh Selection** window is displayed.
- 6 Select all applicable options and click **OK**:
 - Select the **Source Fields** check box if the source has changed.
The **Source Fields** grid is refreshed.
 - Select the **Destination Fields** check box if the destination has changed.
 - The **Target Fields** grid is refreshed.

Destinations

- 7 To unmap a source and target field, select the target field and click **Unmap**.
- 8 To unmap all target fields, click **Unmap All**.
- 9 To view a report of the current mappings, click **Report** and select where the report should be displayed. Options include:

- **Screen**

The report is displayed on the screen in the **Report** window. Click **Close**.

- **File**

Specify the name and location to save the report and click **Save**. The file is saved as a .TXT file.

- **Printer**

Specify the print options and click **OK**.

The report displays all of the information within the target field grid, such as the source field mapped to the target field, type and length. Use the report to identify problems occurring in the destination and to view the results of the source-to-target field mappings.

Destination Options for Computhink ViewWise 6.1


Most of the values specified in the Destination Setup wizard can be changed on the Dest. Options tab. Some fields might be displayed on this tab for informational purposes only and cannot be changed without deleting the destination and recreating it.

ViewWise Options


Option	Description
--------	-------------

Option	Description
Doc Type	<p>To change the document type selected during the destination setup, do the following:</p> <ol style="list-style-type: none"> Select the new document type from the list Return to the Dest. Mappings tab. <p>When the document type is changed, EXCHANGEit reconnects with the ViewWise server and displays the index field names of the new document type in the Dest. Mappings tab. The index field names can then be mapped to the source fields.</p> <ol style="list-style-type: none"> Remap the fields. <p>Remapping is required each time a new document type is selected.</p> <ol style="list-style-type: none"> Return to the Dest. Options tab.
Comment File	Enter the location to save the Comment File. The comment file is a plain text file that holds up to 8000 characters. The content of the comment file is entered in the ViewWise Document Comment field.
create_location	To create the folder and subfolder if they do not exist, select TRUE. To only create the document if the folder and subfolder already exist, select False.
append	To append the images to a document that matches the location, document type, index fields and index field values select TRUE. To force the creation of a new document (even if a matching document already exists), select FALSE.
delete_image	To delete the image after it has been indexed in ViewWise, select TRUE. To keep the images after they have been indexed, select FALSE.

Output File

Option	Description
File Name	Names the output file by the name specified in this field or click the Browse button,  , and map to an existing file.

Destinations

Option	Description
Name by Date	Names the output file according to the date the job was processed. Click the Browse button,  , to select a date format from the Date Format Settings window. For more information, see Set Date Format Settings (page 92).
Name by Input File Name (GTO and TXT)	Names the output file with the same file name as the source (but with the .TXT extension). The source file must be in either .GTO or .TXT format.

Destination ViewWise Node

Option	Description
Room	The Room is the database name. The room must already exist on the ViewWise server and cannot be changed.
Cabinet	The navigation path of documents imported into the room. The cabinet must already exist on the ViewWise server.
Drawer	The navigation path of documents imported into the room. A drawer can be created and added at any time.
Folder	The navigation path of documents imported into the room. A folder can be created and added at any time.
Subfolders	The navigation path of documents imported into the room. A subfolder can be created and added at any time.

Destination Selection for Computhink ViewWise 6.1

The Dest. Selection tab determines which records to transfer to the destination. VBScript can also be added to this specific destination from this tab. If implementing VBScript in all the destinations, do so in the **Job Scripts** tab. For more information, see Use VBScript (page [307](#)).

Steps

- 1 Click the **Dest Selection** tab.
- 2 Select one of the following options in the **Type of selection** section:
 - **Select All Records** - all records in the destination file are selected.
 - **Select First N records** - the first to the Nth records are selected, where N represents the total number of records to select. Indicate the number of records

in the **Total** field.

- **Range of records** - all records within the specified range are selected. Define the range in the **Start** and **End** fields.
 - **Every Nth record** - only each Nth record is selected, where N represents the multiple at which to select records. Define the Nth number in the **Nth** field and at which record to start the multiple count in the **Start At** field. For example, if the Nth number is 5 and the Start At number is 1, every record that is a multiple of 5 is selected. Therefore, records 5, 10, 15, and 20 are selected.
- 3 To add scripts to this specific destination, click **Expression**.
The **Expression Builder** window is displayed.
 - 4 In the **Expression Builder** window, click **OK** when complete.
 - 5 Click **Apply**.
 - 6 Save the .XJB file.

DigiTech ImageSilo

Using an ImageSilo destination requires a custom installation of ImageSilo, which includes the API components.

Destination Setup for DigiTech ImageSilo

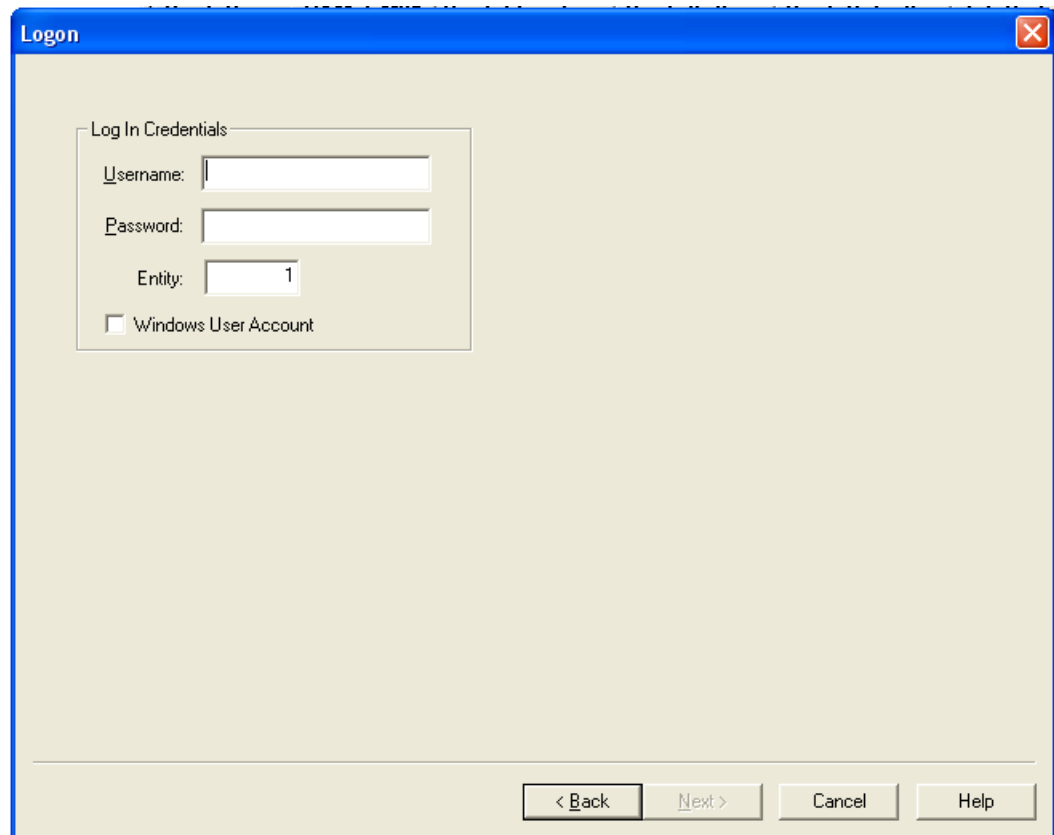
Steps

- 1 Click the **Dest. Setup** tab.
- 2 Click **Configure Destination**. The **Select Destination Type** window is displayed.
- 3 Select **Imaging Applications**. The supported imaging applications are displayed.

To assist in ensuring that the selected Imaging Application meets currently supported version requirements, the **View Certified Versions** button is available. Click to access additional information on the AnyDoc Software website regarding supported Imaging Applications.
- 4 Select **DigiTech ImageSilo** and click **Next**.

Destinations

The **Logon** window is displayed.



Logon

Log In Credentials

Username:

Password:

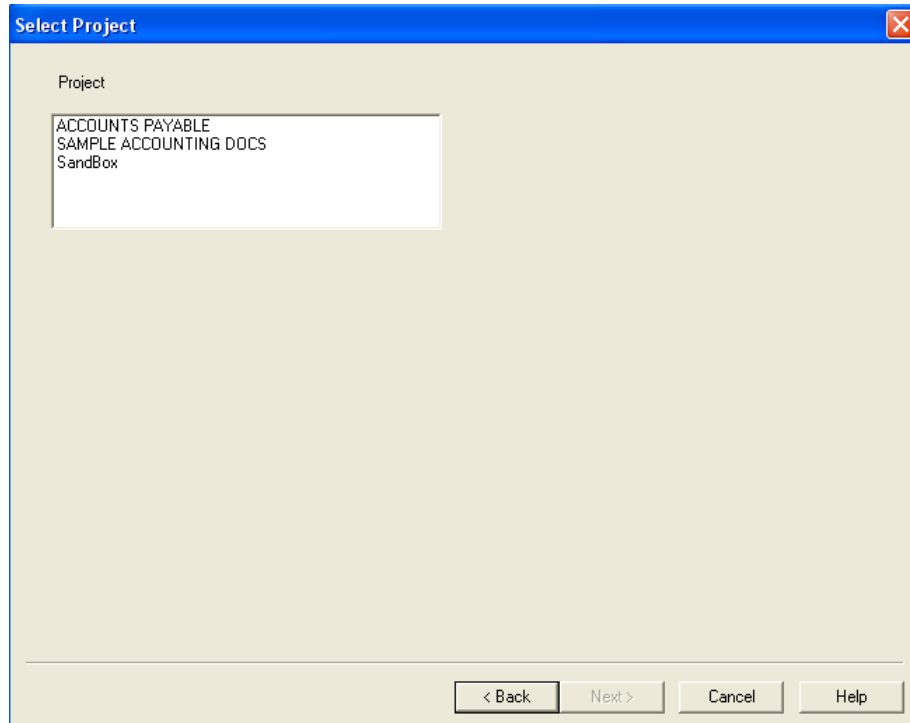
Entity:

☐ Windows User Account

< Back Next > Cancel Help

- 5 Do one of the following:
 - Enter your ImageSilo **Username** and **Password**.
 - Select the **Windows User Account** check box.
- 6 Enter the **Entity** to connect to and Click **Next**.

The **Select Project** window is displayed.



7 Select the destination ImageSilo **Project**.

8 Click **Finish**.

The **Dest. Setup** tab is displayed.

Destination Mappings for DigiTech ImageSilo

Steps

1 Click the **Dest. Mappings** tab.

2 Map the **Source Fields** in the left pane to the appropriate destination or **Target Fields** in the right pane by dragging and dropping each source field into the associated target field.

OR

Click **Automap** to have EXCHANGEit automatically map fields. Source field are mapped to target fields that have similar names.

3 If any changes occurred in the source or destination, click **Refresh Fields** to update the Dest. Mappings tab.

The **Refresh Selection** window is displayed.

4 Select all applicable options and click **OK**:

Destinations

- Select the **Source Fields** check box if the source has changed.
The **Source Fields** grid is refreshed.
 - Select the **Destination Fields** check box if the destination has changed.
 - The **Target Fields** grid is refreshed.
- 5 To unmap all target fields, click **Unmap All**.
- 6 To view a report of the current mappings, click **Report** and select where the report should be displayed. Options include:
- **Screen**
The report is displayed on the screen in the **Report** window. Click **Close**.
 - **File**
Specify the name and location to save the report and click **Save**. The file is saved as a .TXT file.
 - **Printer**
Specify the print options and click **OK**.
- The report displays all of the information within the target field grid, such as the source field mapped to the target field, type and length. Use the report to identify problems occurring in the destination and to view the results of the source-to-target field mappings.

Destination Options for DigiTech ImageSilo

Most of the values specified in the Destination Setup wizard can be changed on the Dest. Options tab. Some fields might be displayed on this tab for informational purposes only and cannot be changed without deleting the destination and recreating it.

Option	Description
Username	Username used to log into PaperVision.
Password	Password used to log into PaperVision.
Entity	The ImageSilo database to connect to.
Windows User Account	Select this check box to log into PaperVision with your Windows username.
Error Threshold	Enter the number of errors that can occur while processing a job. When this limit is reached the job is stopped.

Destination Selection for DigiTech ImageSilo

The **Dest. Selection** tab determines which records to transfer to the destination. VBScript can also be added to this specific destination from this tab. If implementing VBScript in all the destinations, do so in the **Job Scripts** tab. For more information, see [Use VBScript \(page 307\)](#).

Steps

- 1 Click the **Dest Selection** tab.
- 2 Select one of the following options in the **Type of selection** section:
 - **Select All Records** - all records in the destination file are selected.
 - **Select First N records** - the first to the Nth records are selected, where N represents the total number of records to select. Indicate the number of records in the **Total** field.
 - **Range of records** - all records within the specified range are selected. Define the range in the **Start** and **End** fields.
 - **Every Nth record** - only each Nth record is selected, where N represents the multiple at which to select records. Define the Nth number in the **Nth** field and at which record to start the multiple count in the **Start At** field. For example, if the Nth number is 5 and the Start At number is 1, every record that is a multiple of 5 is selected. Therefore, records 5, 10, 15, and 20 are selected.
- 3 To add scripts to this specific destination, click **Expression**.
The **Expression Builder** window is displayed.
- 4 In the **Expression Builder** window, click **OK** when complete.
- 5 Click **Apply**.
- 6 Save the .XJB file.

DigiTech PaperVision Enterprise

Using a PaperVision Enterprise destination requires a custom installation of PaperVision Enterprise, which includes the API components.

Destination Setup for DigiTech PaperVision Enterprise

Steps

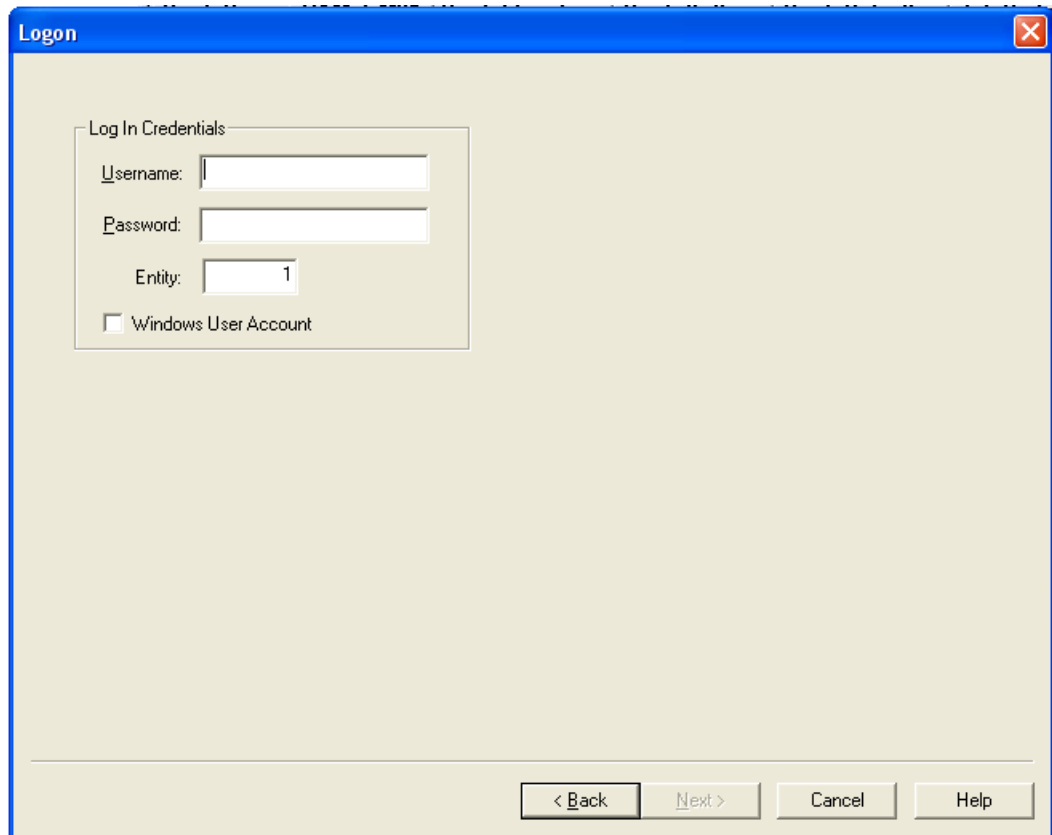
- 1 Click the **Dest. Setup** tab.

Destinations

- 2 Click **Configure Destination**. The **Select Destination Type** window is displayed.
- 3 Select **Imaging Applications**. The supported imaging applications are displayed.

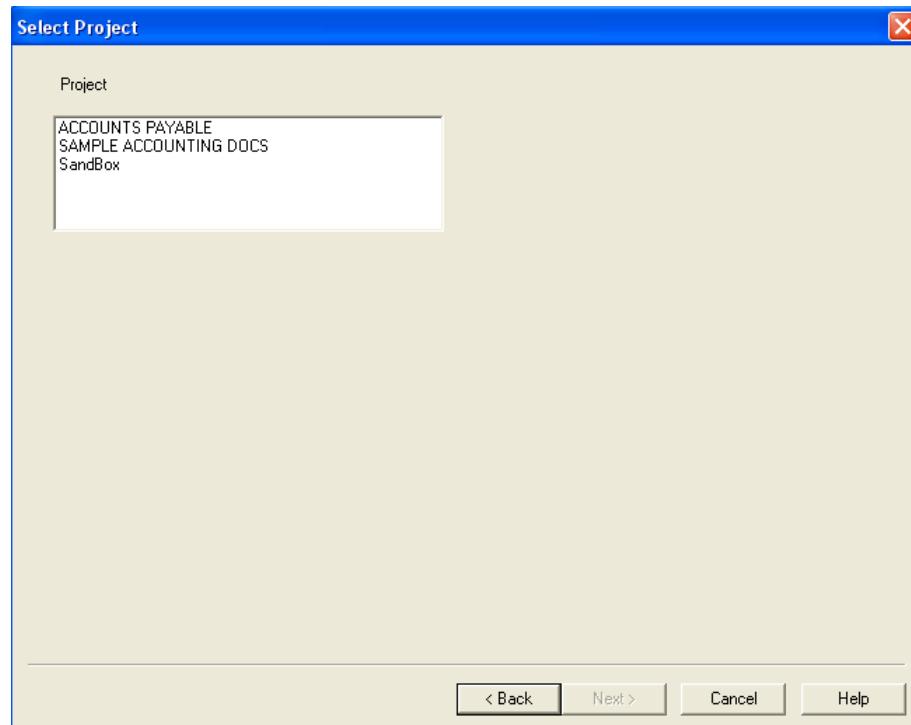
To assist in ensuring that the selected Imaging Application meets currently supported version requirements, the **View Certified Versions** button is available. Click to access additional information on the AnyDoc Software website regarding supported Imaging Applications.
- 4 Select **DigiTech PaperVision Enterprise** and click **Next**.

The **Logon** window is displayed.



- 5 Do one of the following:
 - Enter your PaperVision Enterprise **Username** and **Password**.
 - Select the **Windows User Account** check box.
- 6 Enter the **Entity** to connect to and Click **Next**.

The **Select Project** window is displayed.



7 Select the destination Papervision **Project**.

8 Click **Finish**.

The **Dest. Setup** tab is displayed.

Destination Mappings for DigiTech PaperVision Enterprise

Steps

1 Click the **Dest. Mappings** tab.

2 Map the **Source Fields** in the left pane to the appropriate destination or **Target Fields** in the right pane by dragging and dropping each source field into the associated target field.

OR

Click **Automap** to have EXCHANGEit automatically map fields. Source field are mapped to target fields that have similar names.

3 If any changes occurred in the source or destination, click **Refresh Fields** to update the Dest. Mappings tab.

The **Refresh Selection** window is displayed.

4 Select all applicable options and click **OK**:

Destinations

- Select the **Source Fields** check box if the source has changed.

The **Source Fields** grid is refreshed.

- Select the **Destination Fields** check box if the destination has changed.

5 The **Target Fields** grid is refreshed.

6 To unmap all target fields, click **Unmap All**.

7 To view a report of the current mappings, click **Report** and select where the report should be displayed. Options include:

- **Screen**

The report is displayed on the screen in the **Report** window. Click **Close**.

- **File**

Specify the name and location to save the report and click **Save**. The file is saved as a .TXT file.

- **Printer**

Specify the print options and click **OK**.

The report displays all of the information within the target field grid, such as the source field mapped to the target field, type and length. Use the report to identify problems occurring in the destination and to view the results of the source-to-target field mappings.

Destination Options for DigiTech PaperVision Enterprise

Most of the values specified in the Destination Setup wizard can be changed on the Dest. Options tab. Some fields might be displayed on this tab for informational purposes only and cannot be changed without deleting the destination and recreating it.

Option	Description
Username	Username used to log into PaperVision.
Password	Password used to log into PaperVision.
Entity	The PaperVision database to connect to.
Windows User Account	Select this check box to log into PaperVision with your Windows username.
Error Threshold	Enter the number of errors that can occur while processing a job. When this limit is reached the job is stopped.

Destination Selection for DigiTech PaperVision Enterprise

The **Dest. Selection** tab determines which records to transfer to the destination. VBScript can also be added to this specific destination from this tab. If implementing VBScript in all the destinations, do so in the **Job Scripts** tab. For more information, see [Use VBScript \(page 307\)](#).

Steps

- 1 Click the **Dest Selection** tab.
- 2 Select one of the following options in the **Type of selection** section:
 - **Select All Records** - all records in the destination file are selected.
 - **Select First N records** - the first to the Nth records are selected, where N represents the total number of records to select. Indicate the number of records in the **Total** field.
 - **Range of records** - all records within the specified range are selected. Define the range in the **Start** and **End** fields.
 - **Every Nth record** - only each Nth record is selected, where N represents the multiple at which to select records. Define the Nth number in the **Nth** field and at which record to start the multiple count in the **Start At** field. For example, if the Nth number is 5 and the Start At number is 1, every record that is a multiple of 5 is selected. Therefore, records 5, 10, 15, and 20 are selected.
- 3 To add scripts to this specific destination, click **Expression**.
The **Expression Builder** window is displayed.
- 4 In the **Expression Builder** window, click **OK** when complete.
- 5 Click **Apply**.
- 6 Save the .XJB file.

DocuWare

Destination Setup for DocuWare

Steps

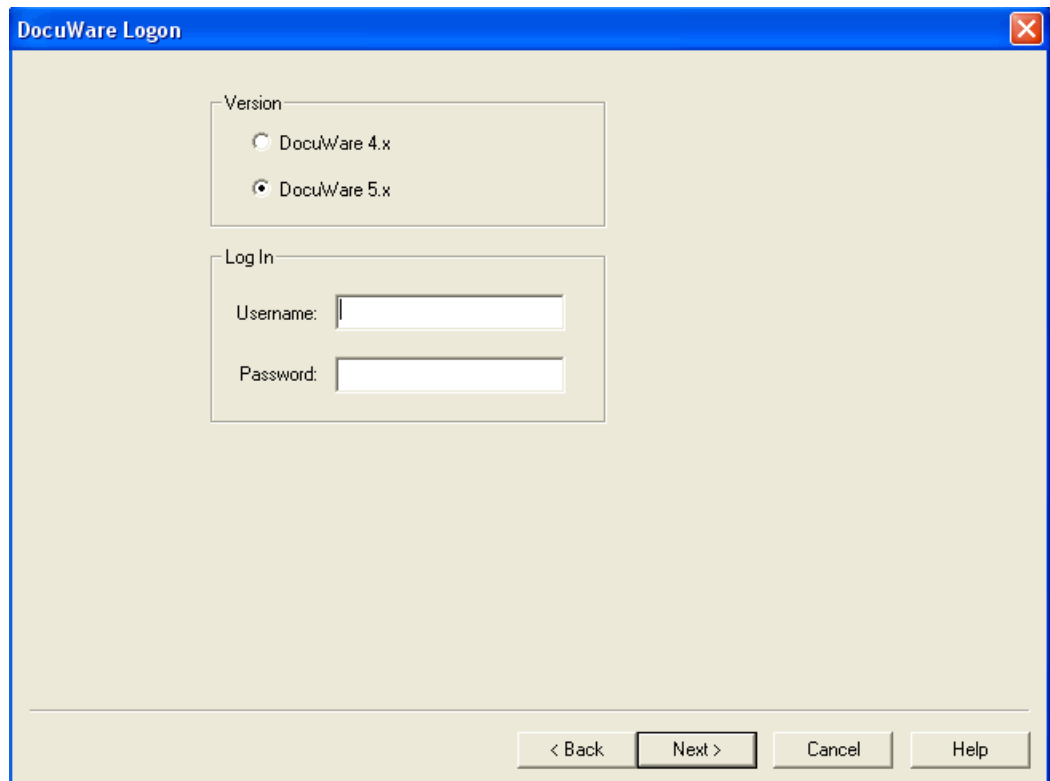
- 1 Click the **Dest. Setup** tab.
- 2 Click **Configure Destination**. The **Select Destination Type** window is displayed.
- 3 Select **Imaging Applications**. The supported imaging applications are displayed.

Destinations

To assist in ensuring that the selected Imaging Application meets currently supported version requirements, the **View Certified Versions** button is available. Click to access additional information on the AnyDoc Software website regarding supported Imaging Applications.

- 4 Select **DocuWare** and click **Next**.

The **DocuWare Logon** window is displayed.

The image shows a screenshot of the 'DocuWare Logon' window. The window has a blue title bar with the text 'DocuWare Logon' and a close button. The main area is light beige. It contains two sections: 'Version' and 'Log In'. The 'Version' section has two radio buttons: 'DocuWare 4.x' and 'DocuWare 5.x', with 'DocuWare 5.x' selected. The 'Log In' section has two text boxes: 'Username:' and 'Password:'. At the bottom right, there are four buttons: '< Back', 'Next >', 'Cancel', and 'Help'.

- 5 Select the applicable DocuWare **Version** number.
- 6 Enter the DocuWare **Username** and **Password** and click **Next**.

The **Select an Archive** window is displayed. Archives permanently store images and data together in record format. DocuWare creates and maintains these archives.

- 7 Select an **Archive** and click **Next**.

The **Select a Basket** window is displayed. A basket is a folder used to temporarily store image files. An image file being imported to an archive is first copied to a basket with a temporary file name. After the image files are successfully copied to the basket, the temporary image files are copied to the permanent archive where they are matched with the field values.

- 8 Select the **Basket** from the drop down list and click **Finish**.

The **Dest. Setup** tab is displayed.



If it is necessary to change the setup, click **Edit Configuration** and repeat the setup process again.

Destination Mappings for DocuWare

Steps

- 1 Click the **Dest. Mappings** tab.
- 2 Map the **Source Fields** in the left pane to the appropriate destination or **Target Fields** in the right pane by dragging and dropping each source field into the associated target field.
OR
Click **Automap** to have EXCHANGEit automatically map fields. Source field are mapped to target fields that have similar names.
- 3 Ensure that the **Type** and **Length** fields are correct.
- 4 If necessary, click **Purge Dest** to delete all records in the destination.
- 5 If any changes occurred in the source or destination, click **Refresh Fields** to update the Dest. Mappings tab.
The **Refresh Selection** window is displayed.
- 6 Select all applicable options and click **OK**:
 - Select the **Source Fields** check box if the source has changed.
The **Source Fields** grid is refreshed.
 - Select the **Destination Fields** check box if the destination has changed.
 - The **Target Fields** grid is refreshed.
- 7 If necessary, designate unique key fields in the destination. Key fields are fields that must contain a unique value in each record. Click the number in the **Target Fields** grid that contains the key field and click the **Key** button. A key symbol appears in the target field. Repeat this step for all key fields.
- 8 To unmap a source and target field, select the target field and click **Unmap**.
- 9 To unmap all target fields, click **Unmap All**.
- 10 To view a report of the current mappings, click **Report** and select where the report should be displayed. Options include:
 - **Screen**
The report is displayed on the screen in the **Report** window. Click **Close**.
 - **File**

Destinations

Specify the name and location to save the report and click **Save**. The file is saved as a .TXT file.

- **Printer**

Specify the print options and click **OK**.

The report displays all of the information within the target field grid, such as the source field mapped to the target field, type and length. Use the report to identify problems occurring in the destination and to view the results of the source-to-target field mappings.

Destination Options for DocuWare

Most of the values specified in the Destination Setup wizard can be changed on the Dest. Options tab. Some fields might be displayed on this tab for informational purposes only and cannot be changed without deleting the destination and recreating it.

Option	Description
Error Threshold	Enter the number of errors that can occur while processing a job. When this limit is reached the job is stopped.
Remove Files from Basket	Select this check box to delete the files from the basket after the files are imported into the archive.

Destination Selection for DocuWare

The Dest. Selection tab determines which records to transfer to the destination. VBScript can also be added to this specific destination from this tab. If implementing VBScript in all the destinations, do so in the **Job Scripts** tab. For more information, see Use VBScript (page [307](#)).

Steps

- 1 Click the **Dest Selection** tab.
- 2 Select one of the following options in the **Type of selection** section:
 - **Select All Records** - all records in the destination file are selected.
 - **Select First N records** - the first to the Nth records are selected, where N represents the total number of records to select. Indicate the number of records in the **Total** field.
 - **Range of records** - all records within the specified range are selected. Define the range in the **Start** and **End** fields.

- **Every Nth record** - only each Nth record is selected, where N represents the multiple at which to select records. Define the Nth number in the **Nth** field and at which record to start the multiple count in the **Start At** field. For example, if the Nth number is 5 and the Start At number is 1, every record that is a multiple of 5 is selected. Therefore, records 5, 10, 15, and 20 are selected.
- 3 To add scripts to this specific destination, click **Expression**.
The **Expression Builder** window is displayed.
 - 4 In the **Expression Builder** window, click **OK** when complete.
 - 5 Click **Apply**.
 - 6 Save the .XJB file.

EMC Documentum ApplicationXtender

Destination Setup for EMC Documentum ApplicationXtender

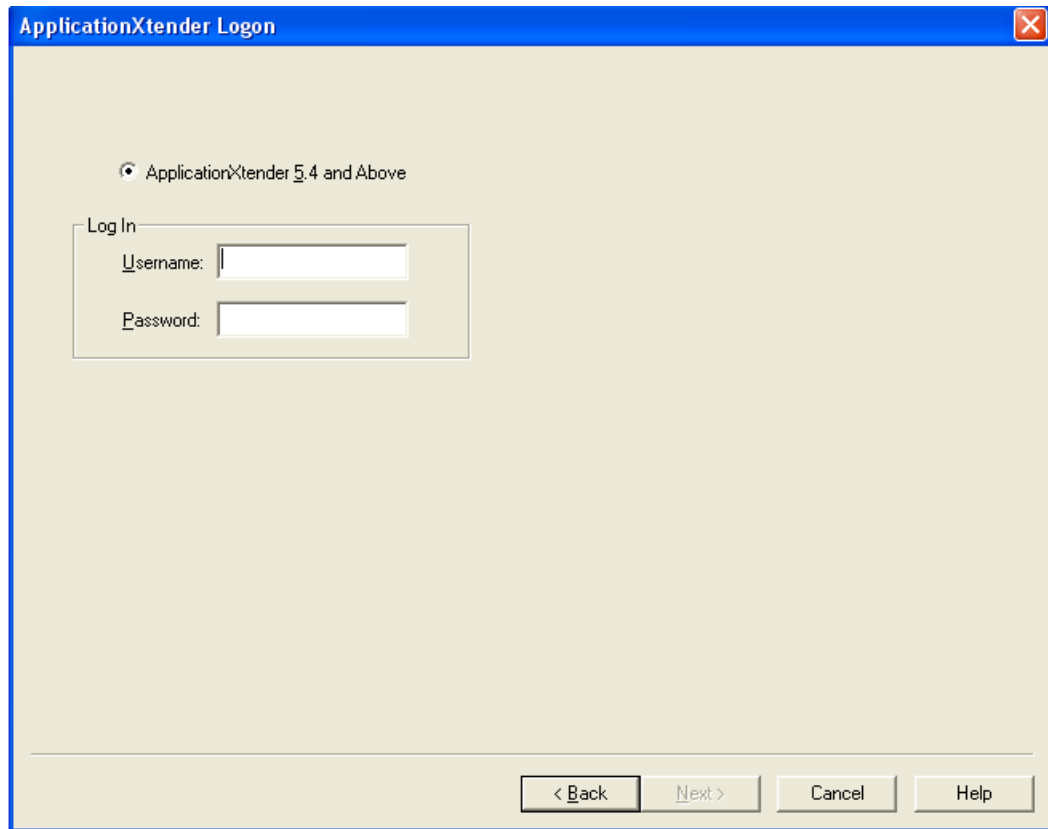
Steps

- 1 Click the **Dest. Setup** tab.
- 2 Click **Configure Destination**. The **Select Destination Type** window is displayed.
- 3 Select **Imaging Applications**. The supported imaging applications are displayed.

To assist in ensuring that the selected Imaging Application meets currently supported version requirements, the **View Certified Versions** button is available. Click to access additional information on the AnyDoc Software website regarding supported Imaging Applications.
- 4 Select **ApplicationXtender** and click **Next**.

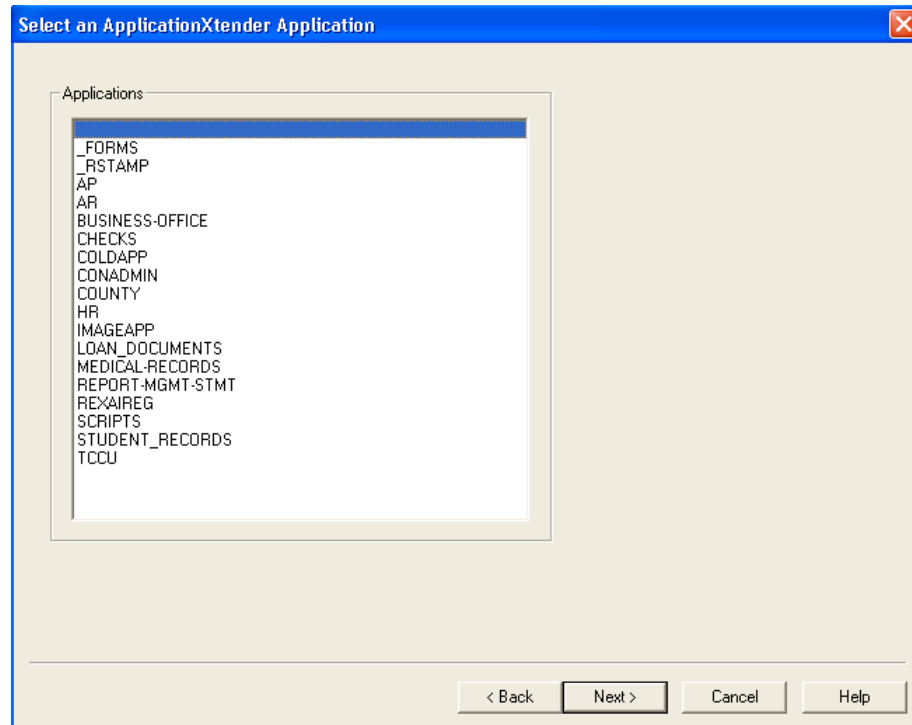
Destinations

The **ApplicationXtender Logon** window is displayed.

The image shows a screenshot of the 'ApplicationXtender Logon' window. The window has a blue title bar with the text 'ApplicationXtender Logon' and a close button (X) in the top right corner. The main area is light beige. At the top, there is a radio button selected next to the text 'ApplicationXtender 5.4 and Above'. Below this, there is a 'Log In' section with two text input fields: 'Username:' and 'Password:'. At the bottom of the window, there are four buttons: '< Back', 'Next >', 'Cancel', and 'Help'.

- 5 Select your installed version.
- 6 Enter the ApplicationXtender **Username** and **Password** and click **Next**.

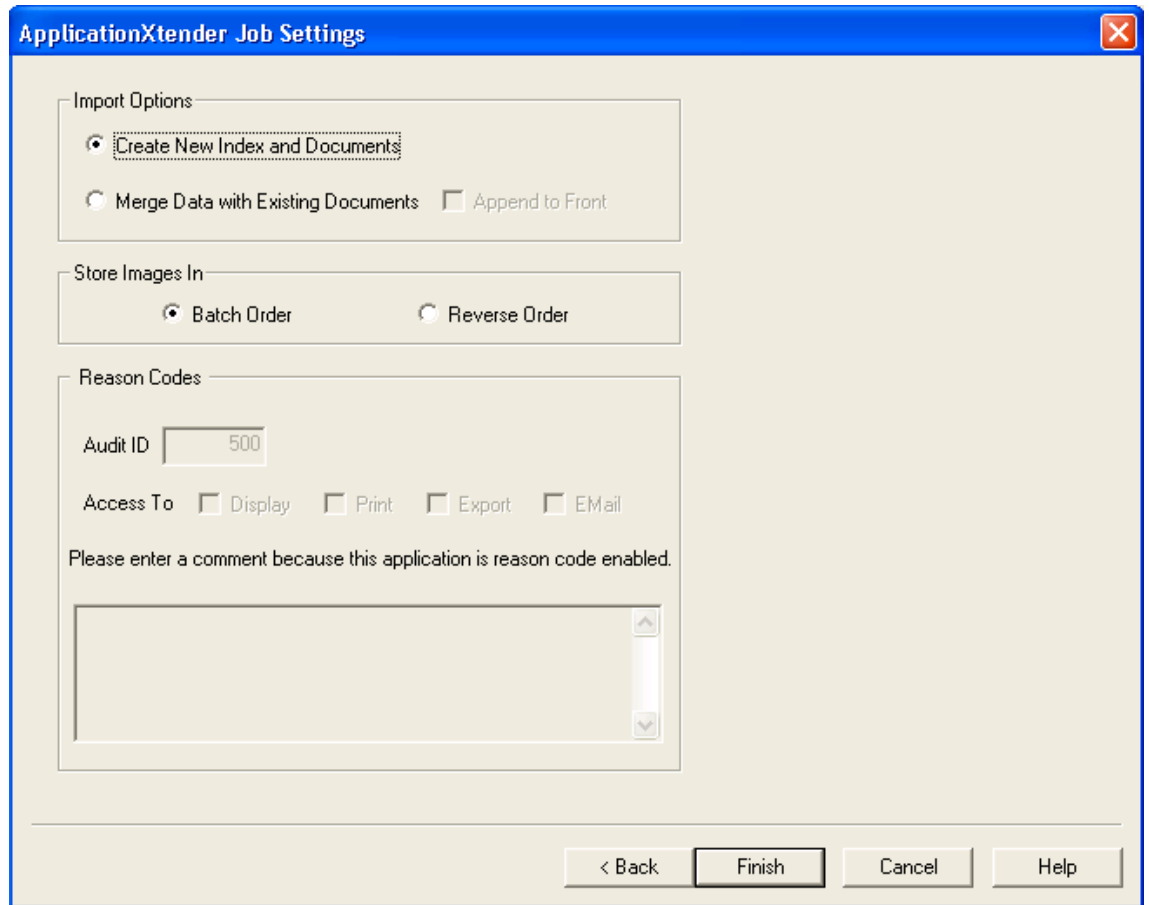
The **Select an ApplicationXtender Application** window is displayed.



- 7 In the **Applications** field, select an ApplicationXtender application and click **Next**.

Destinations

The **ApplicationXtender Job Settings** window is displayed.



8 Select one of the following **Import Options**:

- ***Create New Indexes and Documents***,
Creates a new index for every document that comes in.
- ***Merge Data with Existing Documents***

Causes the system to check for duplicate indexes whenever a set of fields is presented for insertion. If you have a matching, duplicate index or indexes, the first or oldest of these indexes is selected by ApplicationXtender for updating. The incoming document is attached as page one of a multi-page TIFF to the currently existing document belonging to the index.

The ***Append to Front*** check box is automatically selected, appending the incoming documents to the front of the existing document and making the existing document a page of the new document.

EXCHANGEit provides an updated document when an index is duplicated.

If a new index comes in and the field values have an exact duplicate or duplicates, then the new document (image file) is not stored as new. It is appended to the existing document image for that index. You can append to the front or back of the existing document file creating a multi-page image. The default setting is for the oldest images to be first and then, newer pages appended at the end of the document. EXCHANGEit can also append to the beginning of the document so the newest images are first while the oldest images are at the end.

- 9 In the **Store Image In** field, select one of the following:

- **Batch Order**

New images are added into the application in the order they were imported in. Therefore, the first image in the original document set is the first image imported into the application.

- **Reverse Order**

The last image added into the application is the first image of the document set.

- 10 Click **Finish**.

The **Dest. Setup** tab is displayed.



If it is necessary to change the setup, click **Edit Configuration** and repeat the setup process again.

Destination Mappings for EMC Documentum ApplicationXtender

Steps

- 1 Click the **Dest. Mappings** tab.
- 2 Map the **Source Fields** in the left pane to the appropriate destination or **Target Fields** in the right pane by dragging and dropping each source field into the associated target field.
OR
Click **Automap** to have EXCHANGEit automatically map fields. Source field are mapped to target fields that have similar names.
- 3 Ensure that the **Type** and **Length** fields are correct.
- 4 If necessary, click **Purge Dest** to delete all records in the destination.
- 5 If any changes occurred in the source or destination, click **Refresh Fields** to update the Dest. Mappings tab.
The **Refresh Selection** window is displayed.
- 6 Select all applicable options and click **OK**:

Destinations

- Select the **Source Fields** check box if the source has changed.
The **Source Fields** grid is refreshed.
 - Select the **Destination Fields** check box if the destination has changed.
 - The **Target Fields** grid is refreshed.
- 7 If necessary, designate unique key fields in the destination. Key fields are fields that must contain a unique value in each record. Click the number in the **Target Fields** grid that contains the key field and click the **Key** button. A key symbol appears in the target field. Repeat this step for all key fields.
 - 8 To unmap a source and target field, select the target field and click **Unmap**.
 - 9 To unmap all target fields, click **Unmap All**.
 - 10 To view a report of the current mappings, click **Report** and select where the report should be displayed. Options include:
 - **Screen**
The report is displayed on the screen in the **Report** window. Click **Close**.
 - **File**
Specify the name and location to save the report and click **Save**. The file is saved as a .TXT file.
 - **Printer**
Specify the print options and click **OK**.
- The report displays all of the information within the target field grid, such as the source field mapped to the target field, type and length. Use the report to identify problems occurring in the destination and to view the results of the source-to-target field mappings.

Destination Options for EMC Documentum Application Xtender

Most of the values specified in the Destination Setup wizard can be changed on the Dest. Options tab. Some fields might be displayed on this tab for informational purposes only and cannot be changed without deleting the destination and recreating it.

Option	Description
Create New Indexes and Documents	Creates a new index for every document that comes in.

Option	Description
Merge Data with Existing Documents	<p>Causes the system to check for duplicate indexes whenever a set of fields is presented for insertion. If you have a matching, duplicate index or indexes, the first or oldest of these indexes is selected by ApplicationXtender for updating. The incoming document is attached as page one of a multi-page TIFF to the currently existing document belonging to the index.</p> <p>The Append to Front check box is automatically selected, appending the incoming documents to the front of the existing document and making the existing document a page of the new document.</p>
Batch Order	New images are added into the application in the order they were imported in. Therefore, the first image in the original document set is the first image imported into the application.
Reverse Order	The last image added into the application is the first image of the document set.
Skip Missing Images	<p>Select this check box to continue processing a job, without errors, when an image is missing.</p> <p>For example, OCR for AnyDoc can output an ASCII record for a deleted image, but not have a corresponding image for that record. In this instance, the Skip Missing Image check box should be selected because the missing image is intentional.</p>
Error Threshold	Enter the number of errors that can occur while processing a job. When this limit is reached the job is stopped.

Reason Codes

For information about these fields, see the EMC Documentum Application Xtender documentation.

Destination Selection for EMC Documentum ApplicationXtender

The Dest. Selection tab determines which records to transfer to the destination. VBScript can also be added to this specific destination from this tab. If implementing VBScript in all the destinations, do so in the **Job Scripts** tab. For more information, see Use VBScript (page [307](#)).

Steps

- 1 Click the **Dest Selection** tab.
- 2 Select one of the following options in the **Type of selection** section:

Destinations

- **Select All Records** - all records in the destination file are selected.
 - **Select First N records** - the first to the Nth records are selected, where N represents the total number of records to select. Indicate the number of records in the **Total** field.
 - **Range of records** - all records within the specified range are selected. Define the range in the **Start** and **End** fields.
 - **Every Nth record** - only each Nth record is selected, where N represents the multiple at which to select records. Define the Nth number in the **Nth** field and at which record to start the multiple count in the **Start At** field. For example, if the Nth number is 5 and the Start At number is 1, every record that is a multiple of 5 is selected. Therefore, records 5, 10, 15, and 20 are selected.
- 3 To add scripts to this specific destination, click **Expression**.
The **Expression Builder** window is displayed.
 - 4 In the **Expression Builder** window, click **OK** when complete.
 - 5 Click **Apply**.
 - 6 Save the .XJB file.

HP TRIM Context 5.2

EXCHANGEit integrates with TRIM Context 5.2 SP3 by TOWER. To use the TRIM Context 5.2 destination,

- TRIM Context 5.2 SP3 must be installed on the EXCHANGEit server.
- TRIM Context must be running while configuring the destination and running the job.
- The user setting up the destination must have a login account with TRIM Context.
- When mapping fields, the Record Title field is required and must have a value.

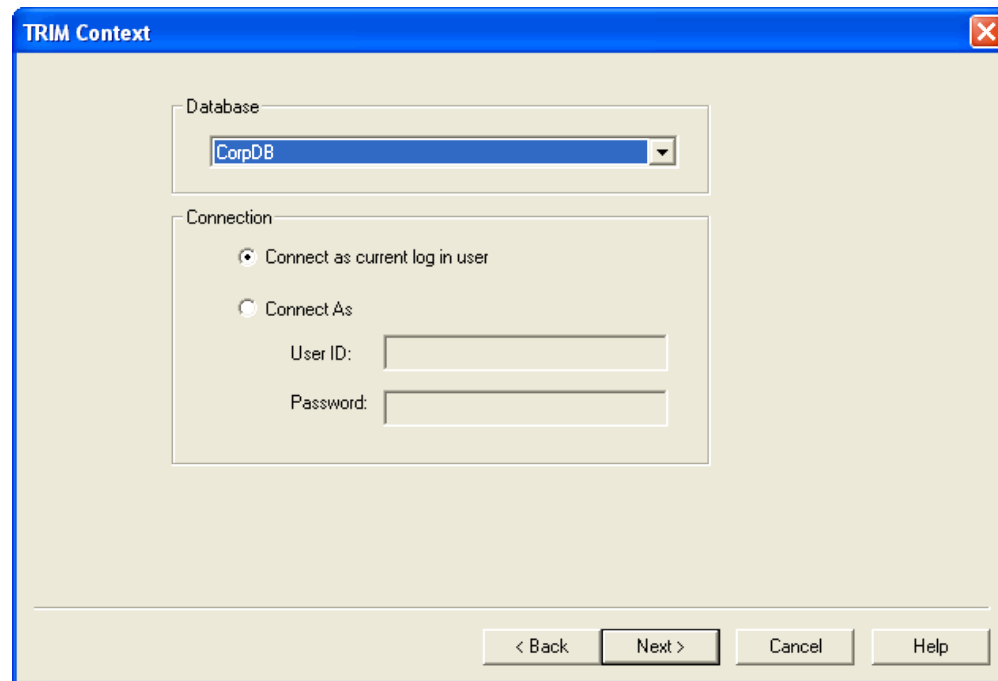
Destination Setup for HP TRIM Context

Steps

- 1 Click the **Dest. Setup** tab.
- 2 Click **Configure Destination**. The **Select Destination Type** window is displayed.
- 3 Select **Imaging Applications**. The supported imaging applications are displayed.

To assist in ensuring that the selected Imaging Application meets currently supported version requirements, the **View Certified Versions** button is available. Click to access additional information on the AnyDoc Software website regarding supported Imaging Applications.

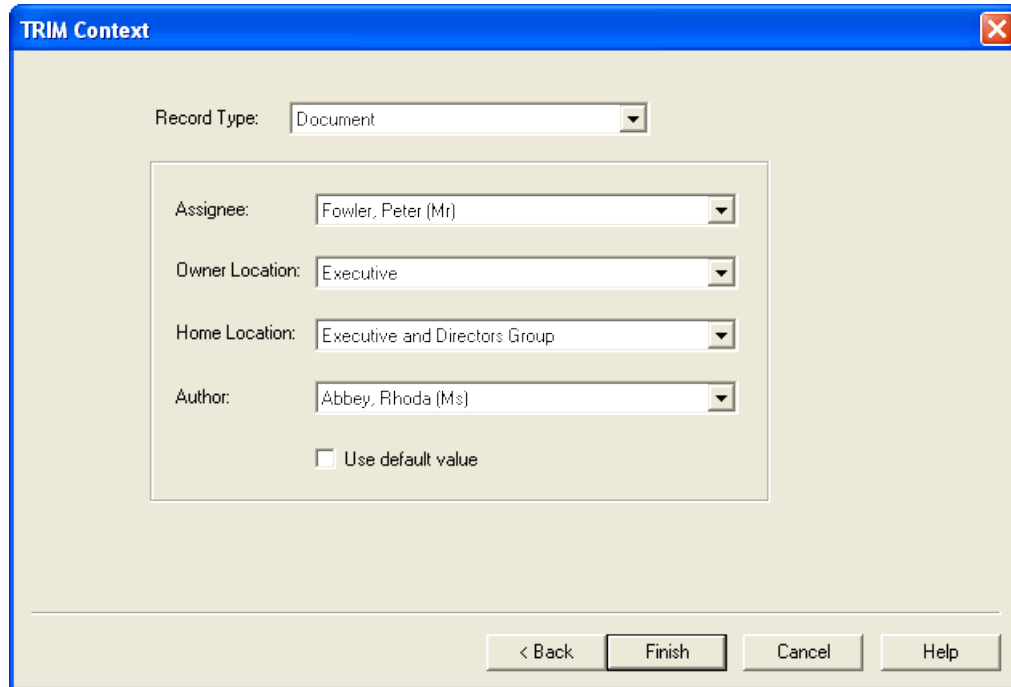
- 4 Select **Trim Context 5.2** and click **Next**. The TRIM Context window is displayed.



- 5 Select the **Database** in which to transfer records.
- 6 Select how to log into the database.
 - Select **Connect as current log in user** to log in using your current Windows login account.
 - OR
 - Select **Connect As** and enter a different **User ID** and **Password** than your current Windows login account.
- 7 Click **Next**.

Destinations

- 8 Define the record type and information to associate with the transferred data.



- 9 Click **Finish**.

Destination Mappings for HP TRIM Context

Be sure to map a source field to the Record Title field. The Record Title field must have a value.

Steps

- 1 Click the **Dest. Mappings** tab.
- 2 Map the **Source Fields** in the left pane to the appropriate destination or **Target Fields** in the right pane by dragging and dropping each source field into the associated target field.
OR
Click **Automap** to have EXCHANGEit automatically map fields. Source field are mapped to target fields that have similar names.
- 3 Ensure that the **Type** and **Length** fields are correct.
- 4 If necessary, click **Purge Dest** to delete all records in the destination.
- 5 If any changes occurred in the source or destination, click **Refresh Fields** to update the Dest. Mappings tab.
The **Refresh Selection** window is displayed.

- 6 Select all applicable options and click **OK**:
 - Select the **Source Fields** check box if the source has changed.
The **Source Fields** grid is refreshed.
 - Select the **Destination Fields** check box if the destination has changed.
 - The **Target Fields** grid is refreshed.
- 7 To unmap a source and target field, select the target field and click **Unmap**.
- 8 To unmap all target fields, click **Unmap All**.
- 9 To view a report of the current mappings, click **Report** and select where the report should be displayed. Options include:
 - **Screen**
The report is displayed on the screen in the **Report** window. Click **Close**.
 - **File**
Specify the name and location to save the report and click **Save**. The file is saved as a .TXT file.
 - **Printer**
Specify the print options and click **OK**.
The report displays all of the information within the target field grid, such as the source field mapped to the target field, type and length. Use the report to identify problems occurring in the destination and to view the results of the source-to-target field mappings.

Destination Options for HP TRIM Context

Most of the values specified in the Destination Setup wizard can be changed on the Dest. Options tab. Some fields might be displayed on this tab for informational purposes only and cannot be changed without deleting the destination and recreating it.

Option	Description
Select All Records	All records in the source file are selected.
Select First N records	The first to the Nth record is selected, where N represents the total number of records to select. Indicate the number of records in the Total field.
Range of records	All records within the specified range are selected. Define the range in the Start and End fields.

Destinations

Option	Description
Every Nth record	Only the Nth record is selected, where N represents the multiple at which to select records. Define the Nth number in the Nth field and at which record to start the multiple count in the Start At field. For example, if the Nth number is 5 and the Start At number is 1, every record that is a multiple of five is selected, specifically 5, 10, 15, and 20.
Expression	Add a VBScript to the project. See Use VBScript (page 307).

Destination Selection for HP TRIM Context

The Dest. Selection tab determines which records to transfer to the destination. VBScript can also be added to this specific destination from this tab. If implementing VBScript in all the destinations, do so in the **Job Scripts** tab. For more information, see Use VBScript (page [307](#)).

Steps

- 1 Click the **Dest Selection** tab.
- 2 Select one of the following options in the **Type of selection** section:
 - **Select All Records** - all records in the destination file are selected.
 - **Select First N records** - the first to the Nth records are selected, where N represents the total number of records to select. Indicate the number of records in the **Total** field.
 - **Range of records** - all records within the specified range are selected. Define the range in the **Start** and **End** fields.
 - **Every Nth record** - only each Nth record is selected, where N represents the multiple at which to select records. Define the Nth number in the **Nth** field and at which record to start the multiple count in the **Start At** field. For example, if the Nth number is 5 and the Start At number is 1, every record that is a multiple of 5 is selected. Therefore, records 5, 10, 15, and 20 are selected.
- 3 To add scripts to this specific destination, click **Expression**.
The **Expression Builder** window is displayed.
- 4 In the **Expression Builder** window, click **OK** when complete.
- 5 Click **Apply**.
- 6 Save the .XJB file.

Hyland OnBase 13 Connector

Using the **Hyland OnBase 13 Connector** as a destination for EXCHANGEit requires installation of Hyland OnBase 13. Users with an earlier version of Hyland OnBase can configure a destination with the **Hyland OnBase 9.2** option for Imaging Application, but this option is obsolete. Complete the following procedures to configure either Hyland OnBase destination option.

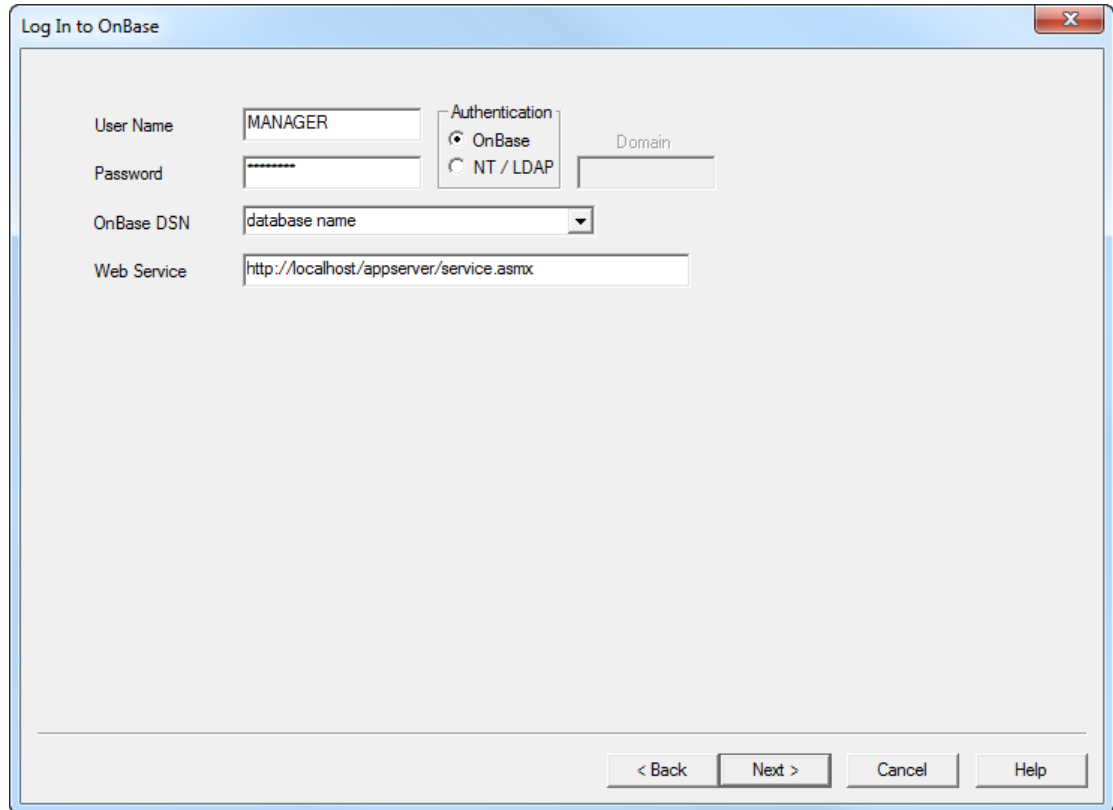
Destination Setup for Hyland OnBase 13 Connector

Steps

- 1 Click the **Dest. Setup** tab.
- 2 Click **Configure Destination**. The **Select Destination Type** window is displayed.
- 3 Select **Imaging Applications**. The supported imaging applications are displayed.
To assist in ensuring that the selected Imaging Application meets currently supported version requirements, the **View Certified Versions** button is available. Click to access additional information on the AnyDoc Software website regarding supported Imaging Applications.

Destinations

- 4 Select **Hyland OnBase 13 Connector** and click **Next**. The **Log In to OnBase** window is displayed.



- 5 Enter the OnBase login information in the **User Name** and **Password** fields.
- 6 Select the **Authentication** method for connecting to OnBase:
 - **OnBase**: Log into OnBase using OnBase login information.
 - **NT/LDAP**: Log into OnBase using NT/LDAP login information. If using NT/LDAP authentication, enter the appropriate domain in the **Domain** field.
- 7 Select the OnBase data source from the **OnBase DSN** drop-down list. This list is populated by the ODBC connections that EXCHANGEit detects on your system.
- 8 Enter the **Web Service** path for your OnBase system.
- 9 Click **Next**. EXCHANGEit connects to the OnBase client. If OnBase is not already running, then it is automatically started. The **OnBase Document Types** window is displayed.
- 10 Select the OnBase document type and click **Finish**. The **Dest. Setup** tab is displayed again.



If it is necessary to change the setup, click Edit Configuration and repeat the setup process again.

Destination Mappings for Hyland OnBase 13 Connector

Steps

- 1 Click the **Dest. Mappings** tab.
- 2 Map the **Source Fields** in the left pane to the appropriate destination or **Target Fields** in the right pane by dragging and dropping each source field into the associated target field.
OR
Click **Automap** to have EXCHANGEit automatically map fields. Source fields are mapped to target fields that have similar names.
- 3 Ensure that the **Type** and **Length** fields are correct.
- 4 If necessary, click **Purge Dest** to delete all records in the destination.
- 5 If any changes occurred in the source or destination, click **Refresh Fields** to update the Dest. Mappings tab.
The **Refresh Selection** window is displayed.
- 6 Select all applicable options and click **OK**:
 - Select the **Source Fields** check box if the source has changed.
The **Source Fields** grid is refreshed.
 - Select the **Destination Fields** check box if the destination has changed.
 - The **Target Fields** grid is refreshed.
- 7 If necessary, designate unique key fields in the destination. Key fields are fields that must contain a unique value in each record. Click the number in the **Target Fields** grid that contains the key field and click the **Key** button. A key symbol appears in the target field. Repeat this step for all key fields.
- 8 To unmap a source and target field, select the target field and click **Unmap**.
- 9 To unmap all target fields, click **Unmap All**.
- 10 To view a report of the current mappings, click **Report** and select where the report should be displayed. Options include:
 - **Screen**
The report is displayed on the screen in the **Report** window. Click **Close**.

Destinations

- **File**

Specify the name and location to save the report and click **Save**. The file is saved as a .TXT file.

- **Printer**

Specify the print options and click **OK**.

The report displays all of the information within the target field grid, such as the source field mapped to the target field, type and length. Use the report to identify problems occurring in the destination and to view the results of the source-to-target field mappings.

Destination Options for Hyland OnBase 13 Connector

Most of the values specified in the Destination Setup wizard can be changed on the Dest. Options tab. Some fields might be displayed on this tab for informational purposes only and cannot be changed without deleting the destination and recreating it.

Option	Description
Error Threshold	Enter the number of errors that can occur while processing a job. When this limit is reached the job is stopped.
Duplicates	Provides functions for controlling how data is queried and validated in the OnBase database. These options decrease processing time and eliminate duplicate record errors between the source and OnBase database. Before EXCHANGEit transfers source data, a query is performed on the OnBase database. Source data is added to the end of the query results.
Query with Date Range	Select this check box to limit the number of query results by date. EXCHANGEit queries the OnBase database for records that are assigned an internal date that occurs within the start and end range of dates.
Start Date	Enter the date to start the search with in the field. This is required to run a query limited by date.
End Date	Leave this field blank to always use the current date as the end date. The current date is the date that the query is run. Enter a specific date to end the search within the End Date field.
Check for duplicate records	Select this check box to search for duplicated records between the source data and the OnBase database.
Replace the current image with a new image	Select this option to overwrite the existing image with the new image

Option	Description
Append new image to old image (add a page)	Select this option to keep the existing image and add the new image.
Fields	If the Check for duplicate records check box is enabled, specify which fields to check for duplicate records. All of the fields in the document type are listed.

Destination Selection for Hyland OnBase 13 Connector

The Dest. Selection tab determines which records to transfer to the destination. VBScript can also be added to this specific destination from this tab. If implementing VBScript in all the destinations, do so in the **Job Scripts** tab. For more information, see Use VBScript (page [307](#)).

Steps

- 1 Click the **Dest Selection** tab.
- 2 Select one of the following options in the **Type of selection** section:
 - **Select All Records** - all records in the destination file are selected.
 - **Select First N records** - the first to the Nth records are selected, where N represents the total number of records to select. Indicate the number of records in the **Total** field.
 - **Range of records** - all records within the specified range are selected. Define the range in the **Start** and **End** fields.
 - **Every Nth record** - only each Nth record is selected, where N represents the multiple at which to select records. Define the Nth number in the **Nth** field and at which record to start the multiple count in the **Start At** field. For example, if the Nth number is 5 and the Start At number is 1, every record that is a multiple of 5 is selected. Therefore, records 5, 10, 15, and 20 are selected.
- 3 To add scripts to this specific destination, click **Expression**.
The **Expression Builder** window is displayed.
- 4 In the **Expression Builder** window, click **OK** when complete.
- 5 Click **Apply**.
- 6 Save the .XJB file.

IBM DB2 Content Manager

EXCHANGEit integrates with IBM® DB2® Content Manager Edition 8.2 to move information to IBM DB2 UDB Server Express Edition 8.1 (DB2 Database).

EXCHANGEit must be installed on the Content Manager server to use the Content Manager destination.

Item Types

Because Content Manager is content management software for digital media files, EXCHANGEit can be set up as a workflow manager that moves digital media from various sources to the DB2 Database. Specifically, information from the source files is transferred to the DB2 Database and stored in the attributes of the specified item type. The item type is identified when setting up the Content Manager destination. Fields defined in the item type properties default to the Dest. Mappings tab, where the source fields are mapped to the item type fields.

Before Configuring the Content Manager Destination

Before setting up the Content Manager destination, identify the following items:

- User name and password to the DB2 UDB Database
- Item Type to transfer information into
- Database, also known as the "server," within the DB2 UDB Database

Because login information to the DB2 Database and an item type must be provided to EXCHANGEit, setting up the Content Manager destination is limited to only those users with experience in and access to the System Administration Client and DB2 Database for Content Manager.

Only one item type is defined in a Content Manager destination. Therefore, set up one Content Manager destination for each item type that is to receive source file information.

Destination Setup for IBM DB2 Content Manager

Steps

- 1 Click the **Dest. Setup** tab.
- 2 Click **Configure Destination**. The **Select Destination Type** window is displayed.
- 3 Select **Imaging Applications**. The supported imaging applications are displayed.
To assist in ensuring that the selected Imaging Application meets currently supported version requirements, the **View Certified Versions** button is available. Click to access additional information on the AnyDoc Software website regarding supported Imaging Applications.

- 4 Select **IBM Content Manager** and click **Next**.
The **Content Manager Log In** window is displayed.
- 5 Enter the Content Manager login information in the **Username** and **Password** fields.
- 6 Enter the database name in the **Database** field.
- 7 Click **Next**.
The **Select Item Type** window is displayed.
- 8 Select the item type from the drop down list and click **Finish**.
The **Dest. Setup** tab is displayed.



If it is necessary to change the setup, click **Edit Configuration** and repeat the setup process again.

Destination Mappings for IBM DB2 Content Manager

Fields defined in the item type properties default to the Dest. Mappings tab | Target Fields grid. Source fields are mapped to the fields of the item type. The properties associated with each field, such as type and length, default from the item type, so it is not recommended to change the properties of the mapped fields.

Steps

- 1 Click the **Dest. Mappings** tab.
- 2 Map the **Source Fields** in the left pane to the appropriate destination or **Target Fields** in the right pane by dragging and dropping each source field into the associated target field.
OR
Click **Automap** to have EXCHANGEit automatically map fields. Source field are mapped to target fields that have similar names.
- 3 Ensure that the **Type** and **Length** fields are correct.
- 4 If necessary, click **Purge Dest** to delete all records in the destination.
- 5 If any changes occurred in the source or destination, click **Refresh Fields** to update the Dest. Mappings tab.
The **Refresh Selection** window is displayed.
- 6 Select all applicable options and click **OK**:
 - Select the **Source Fields** check box if the source has changed.
The **Source Fields** grid is refreshed.

Destinations

- Select the **Destination Fields** check box if the destination has changed.
 - The **Target Fields** grid is refreshed.
- 7 If necessary, designate unique key fields in the destination. Key fields are fields that must contain a unique value in each record. Click the number in the **Target Fields** grid that contains the key field and click the **Key** button. A key symbol appears in the target field. Repeat this step for all key fields.
 - 8 To unmap a source and target field, select the target field and click **Unmap**.
 - 9 To unmap all target fields, click **Unmap All**.
 - 10 To view a report of the current mappings, click **Report** and select where the report should be displayed. Options include:
 - **Screen**
The report is displayed on the screen in the **Report** window. Click **Close**.
 - **File**
Specify the name and location to save the report and click **Save**. The file is saved as a .TXT file.
 - **Printer**
Specify the print options and click **OK**.
The report displays all of the information within the target field grid, such as the source field mapped to the target field, type and length. Use the report to identify problems occurring in the destination and to view the results of the source-to-target field mappings.

Destination Options for IBM DB2 Content Manager

Most of the values specified in the Destination Setup wizard can be changed on the Dest. Options tab. Some fields might be displayed on this tab for informational purposes only and cannot be changed without deleting the destination and recreating it.

Option	Description
Error Threshold	Enter the number of errors that can occur while processing a job. When this limit is reached the job is stopped.

Destination Selection for IBM DB2 Content Manager

The **Dest. Selection** tab determines which records to transfer to the destination. VBScript can also be added to this specific destination from this tab. If implementing VBScript in all the destinations, do so in the **Job Scripts** tab. For more information, see [Use VBScript \(page 307\)](#).

Steps

- 1 Click the **Dest Selection** tab.
- 2 Select one of the following options in the **Type of selection** section:
 - **Select All Records** - all records in the destination file are selected.
 - **Select First N records** - the first to the Nth records are selected, where N represents the total number of records to select. Indicate the number of records in the **Total** field.
 - **Range of records** - all records within the specified range are selected. Define the range in the **Start** and **End** fields.
 - **Every Nth record** - only each Nth record is selected, where N represents the multiple at which to select records. Define the Nth number in the **Nth** field and at which record to start the multiple count in the **Start At** field. For example, if the Nth number is 5 and the Start At number is 1, every record that is a multiple of 5 is selected. Therefore, records 5, 10, 15, and 20 are selected.
- 3 To add scripts to this specific destination, click **Expression**.
The **Expression Builder** window is displayed.
- 4 In the **Expression Builder** window, click **OK** when complete.
- 5 Click **Apply**.
- 6 Save the .XJB file.

IBM FileNET Panagon

Destination Setup for IBM FileNET Panagon

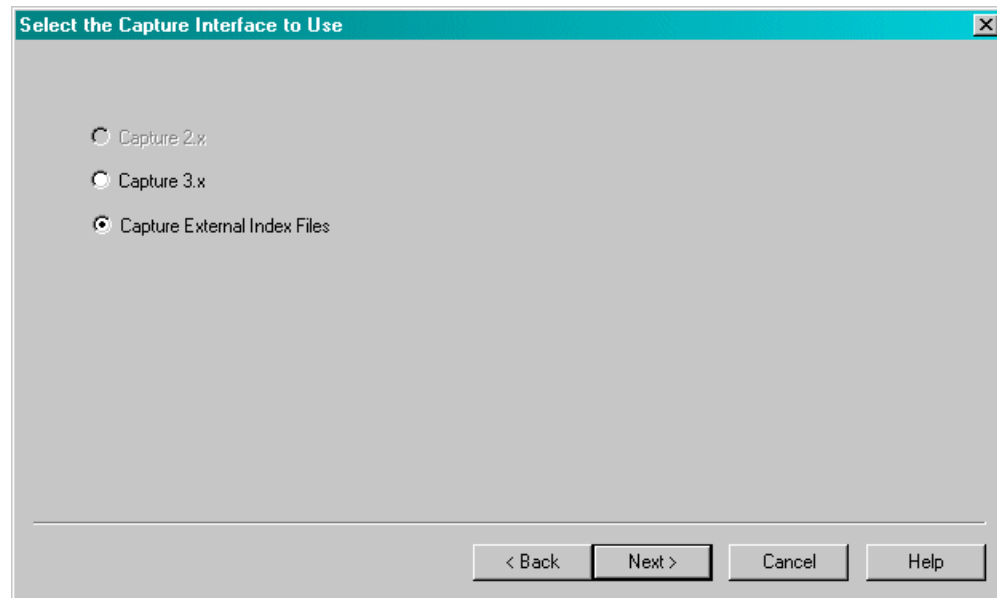
Steps

- 1 Click the **Dest. Setup** tab.
- 2 Click **Configure Destination**. The **Select Destination Type** window is displayed.
- 3 Select **Imaging Applications**. The supported imaging applications are displayed.

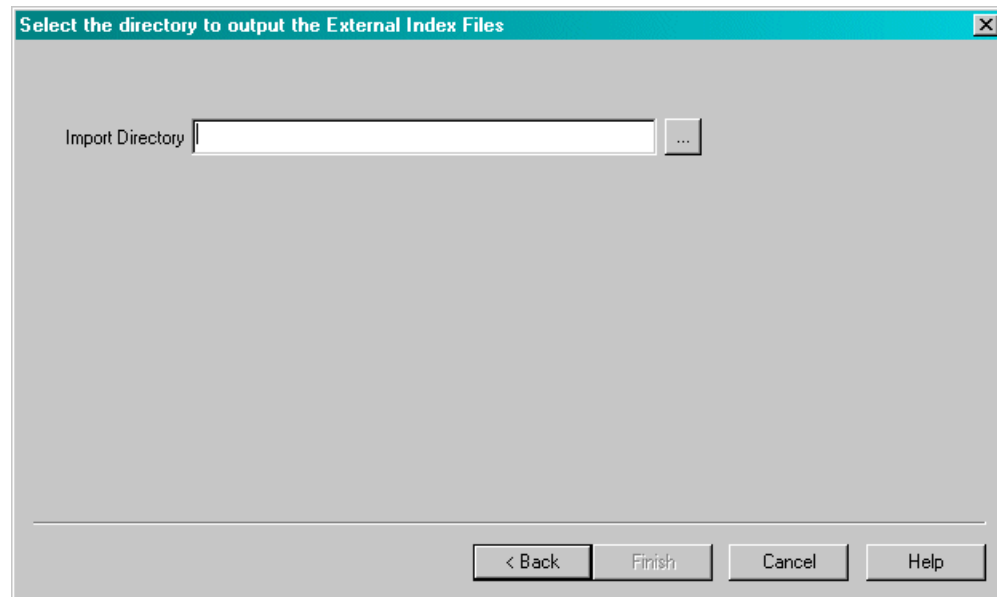
Destinations


To assist in ensuring that the selected Imaging Application meets currently supported version requirements, the **View Certified Versions** button is available. Click to access additional information on the AnyDoc Software website regarding supported Imaging Applications.

- 4 Select **Panagon IDM** and click **Next**. The Select the Capture Interface to Use window is displayed.



- 5 Leave the **Capture External Index Files** radio button enabled and click **Next**. It is not recommended to select the Capture 3.x check box. The Select the directory to output the External Index Files window is displayed.



- 6 Click the **Browse** button, , and map to the import directory.
- 7 Click **Finish**.
The Dest. Setup tab is displayed

Destination Mappings for IBM FileNET Panagon

The following components must be set up in Panagon:

- Import
- Assembly
- Index (specify which indexes go with each line in the FileNet Attributes file)
- Commit

Source fields mapped to a Panagon destination are generated into two files when the job is processed:

- .TIF (image file)
- .FNA (FileNet Attribute File)

Destinations

The .FNA file is structured to place one value per line; therefore, ensure that you map the source fields to the destination in the correct order so that the source field values are inserted into the correct line in the .FNA file.

Steps

- 1 Click the **Dest. Mappings** tab.
- 2 Map the **Source Fields** in the left pane to the appropriate destination or **Target Fields** in the right pane by dragging and dropping each source field into the associated target field.
OR
Click **Automap** to have EXCHANGEit automatically map fields. Source field are mapped to target fields that have similar names.
- 3 Ensure that the **Type** and **Length** fields are correct.
- 4 If necessary, click **Purge Dest** to delete all records in the destination.
- 5 If any changes occurred in the source or destination, click **Refresh Fields** to update the Dest. Mappings tab.
The **Refresh Selection** window is displayed.
- 6 Select all applicable options and click **OK**:
 - Select the **Source Fields** check box if the source has changed.
The **Source Fields** grid is refreshed.
 - Select the **Destination Fields** check box if the destination has changed.
 - The **Target Fields** grid is refreshed.
- 7 If necessary, designate unique key fields in the destination. Key fields are fields that must contain a unique value in each record. Click the number in the **Target Fields** grid that contains the key field and click the **Key** button. A key symbol appears in the target field. Repeat this step for all key fields.
- 8 To unmap a source and target field, select the target field and click **Unmap**.
- 9 To unmap all target fields, click **Unmap All**.
- 10 To view a report of the current mappings, click **Report** and select where the report should be displayed. Options include:
 - **Screen**
The report is displayed on the screen in the **Report** window. Click **Close**.
 - **File**

Specify the name and location to save the report and click **Save**. The file is saved as a .TXT file.


- **Printer**

Specify the print options and click **OK**.

The report displays all of the information within the target field grid, such as the source field mapped to the target field, type and length. Use the report to identify problems occurring in the destination and to view the results of the source-to-target field mappings.

Destination Options for IBM FileNET Panagon

Most of the values specified in the Destination Setup wizard can be changed on the Dest. Options tab. Some fields might be displayed on this tab for informational purposes only and cannot be changed without deleting the destination and recreating it.

Option	Description
Import Directory	Enter the location of the Panagon import directory or click the Browse button,  , to find the location.
Error Threshold	Enter the number of errors that can occur while processing a job. When this limit is reached the job is stopped.

Destination Selection for IBM FileNET Panagon

The Dest. Selection tab determines which records to transfer to the destination. VBScript can also be added to this specific destination from this tab. If implementing VBScript in all the destinations, do so in the **Job Scripts** tab. For more information, see Use VBScript (page [307](#)).

Steps

- 1 Click the **Dest Selection** tab.
- 2 Select one of the following options in the **Type of selection** section:
 - **Select All Records** - all records in the destination file are selected.
 - **Select First N records** - the first to the Nth records are selected, where N represents the total number of records to select. Indicate the number of records in the **Total** field.
 - **Range of records** - all records within the specified range are selected. Define the range in the **Start** and **End** fields.

Destinations

- **Every Nth record** - only each Nth record is selected, where N represents the multiple at which to select records. Define the Nth number in the **Nth** field and at which record to start the multiple count in the **Start At** field. For example, if the Nth number is 5 and the Start At number is 1, every record that is a multiple of 5 is selected. Therefore, records 5, 10, 15, and 20 are selected.
- 3 To add scripts to this specific destination, click **Expression**.
The **Expression Builder** window is displayed.
 - 4 In the **Expression Builder** window, click **OK** when complete.
 - 5 Click **Apply**.
 - 6 Save the .XJB file.

Image Integration Systems DocuSphere

EXCHANGEit integrates with Image Integration Systems DocuSphere Content Manager, version 4.2.1.8.

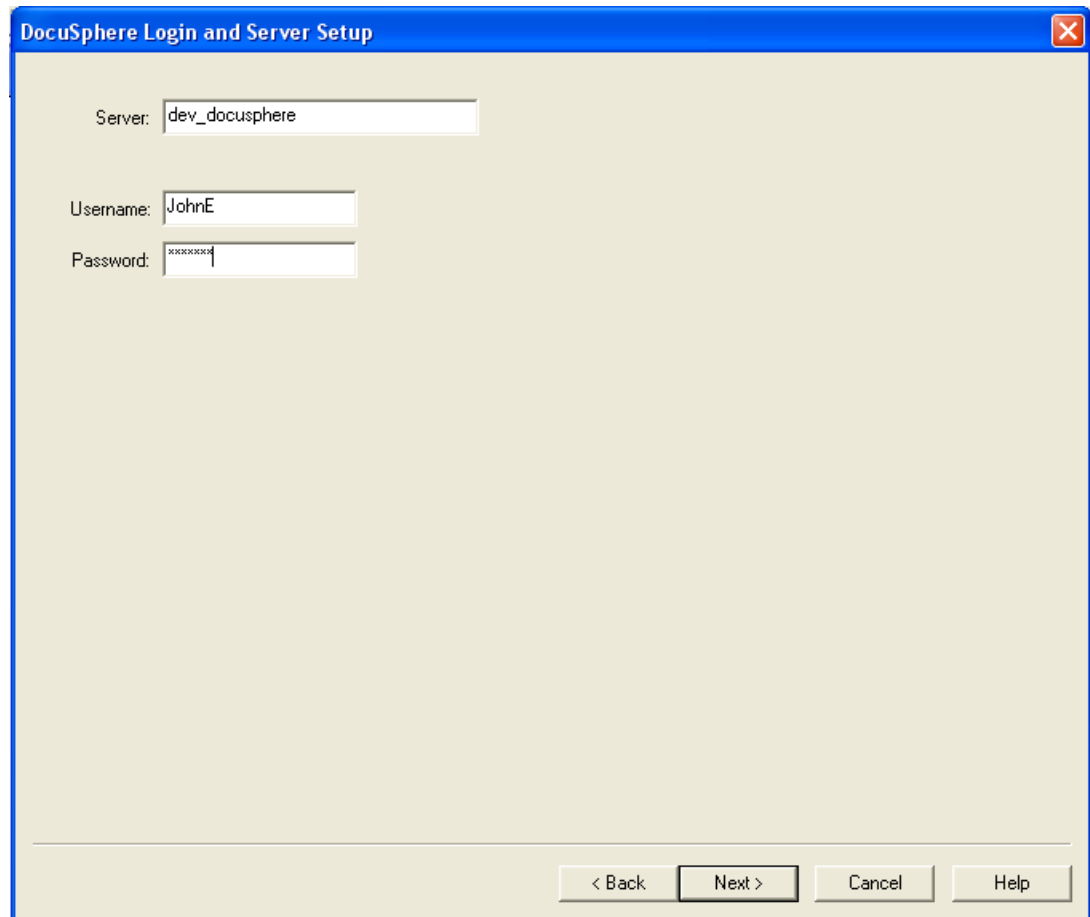
DocuSphere Content Manager is an imaging application that provides document management and, if an image viewing application is installed, image viewing capabilities.

Destination Setup for DocuSphere

Steps

- 1 Click the **Dest. Setup** tab.
- 2 Click **Configure Destination**. The **Select Destination Type** window is displayed.
- 3 Select **Imaging Applications**. The supported imaging applications are displayed.
- 4 To assist in ensuring that the selected Imaging Application meets currently supported version requirements, the **View Certified Versions** button is available. Click to access additional information on the AnyDoc Software website regarding supported Imaging Applications.
- 5 Select **Image Integrations Systems DocuSphere** and click **Next**.

The **DocuSphere Login and Server Setup** window is displayed.



DocuSphere Login and Server Setup

Server: dev_docusphere

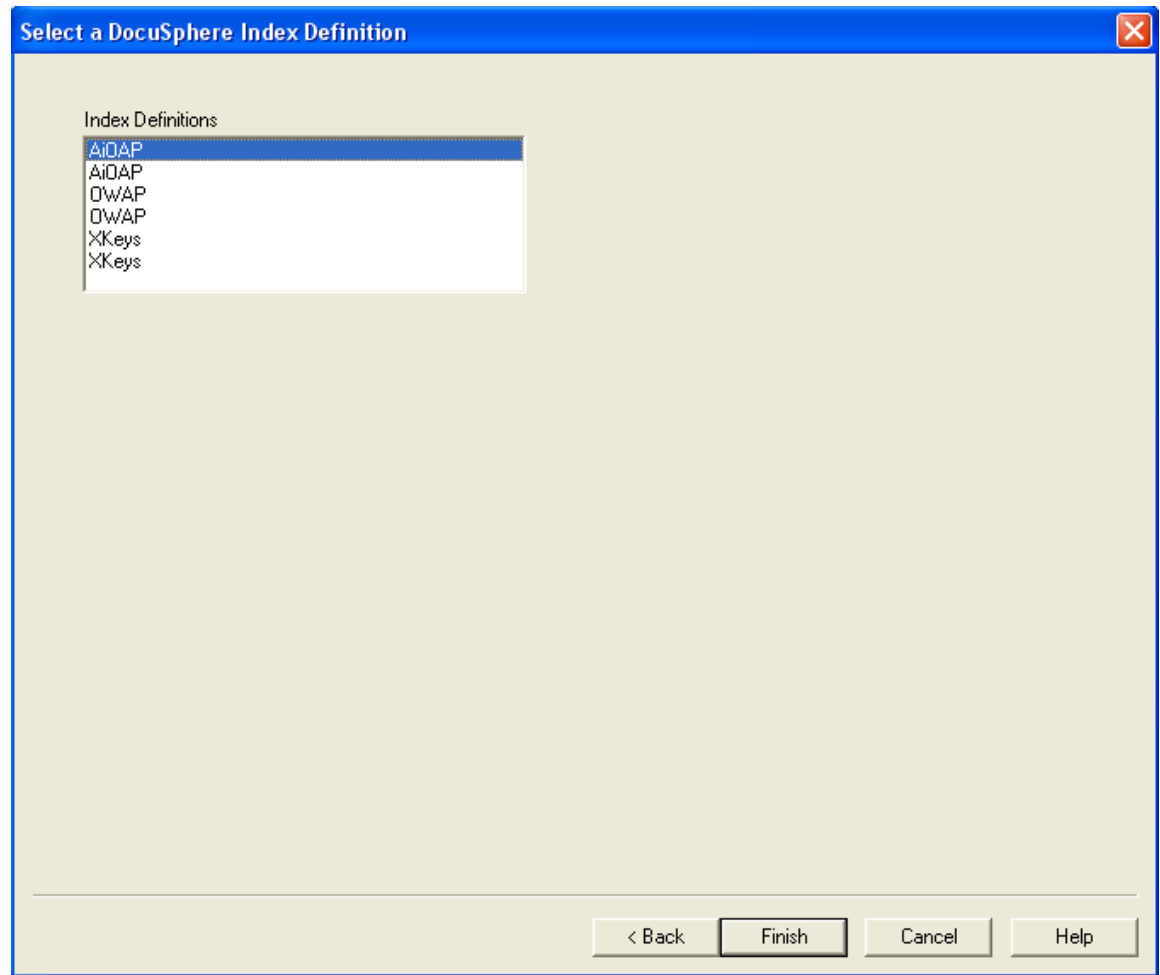
Username: JohnE

Password: xxxxxxx

< Back Next > Cancel Help

- 6 Enter the Docusphere **Server Name**.
- 7 Enter the login information in the **Username** and **Password** fields.
- 8 Click **Next**.

The **Select A DocuSphere Index Definition** window is displayed.

Destinations

- 9 Select an **Index Definition** and click **Finish**.

The **Dest. Setup** tab is displayed.

Destination Mappings for DocuSphere

Be sure to map a source field to the Record Title field. The Record Title field must have a value.

Steps

- 1 Click the **Dest. Mappings** tab.
- 2 Map the **Source Fields** in the left pane to the appropriate destination or **Target Fields** in the right pane by dragging and dropping each source field into the associated target field.

OR

Click **Automap** to have EXCHANGEit automatically map fields. Source field are mapped to target fields that have similar names.

- 3 Ensure that the **Type** and **Length** fields are correct.
- 4 If any changes occurred in the source or destination, click **Refresh Fields** to update the Dest. Mappings tab.
The **Refresh Selection** window is displayed.
- 5 Select all applicable options and click **OK**:
 - Select the **Source Fields** check box if the source has changed.
The **Source Fields** grid is refreshed.
 - Select the **Destination Fields** check box if the destination has changed.
 - The **Target Fields** grid is refreshed.
- 6 To unmap a source and target field, select the target field and click **Unmap**.
- 7 To unmap all target fields, click **Unmap All**.
- 8 To view a report of the current mappings, click **Report** and select where the report should be displayed. Options include:
 - **Screen**
The report is displayed on the screen in the **Report** window. Click **Close**.
 - **File**
Specify the name and location to save the report and click **Save**. The file is saved as a .TXT file.
 - **Printer**
Specify the print options and click **OK**.

The report displays all of the information within the target field grid, such as the source field mapped to the target field, type and length. Use the report to identify problems occurring in the destination and to view the results of the source-to-target field mappings.

Destination Options for DocuSphere

Most of the values specified in the Destination Setup wizard can be changed on the Dest. Options tab. Some fields might be displayed on this tab for informational purposes only and cannot be changed without deleting the destination and recreating it.

Login

Destinations

Option	Description
Username	Username used to log into DocuSphere.
Password	Password used to log into DocuSphere.
Server	The Docusphere Server Name.
Test Login	Click to connect to the specified DocuSphere server.

Option	Description
Make all values UPPERCASE	Select this check box to change all values transferred into DocuSphere to uppercase.
Process Line Item Data	Select this check box to connect line item values to a document field.
Select a Document ID Field	If Process Line Item Data is selected, select the document ID that connects the document field to the line item data. The selected field is then added to the Dest. Mapping tab and can then be mapped.
Error Threshold	Enter the number of errors that can occur while processing a job. When this limit is reached the job is stopped.

Destination Selection for DocuSphere

The Dest. Selection tab determines which records to transfer to the destination. VBScript can also be added to this specific destination from this tab. If implementing VBScript in all the destinations, do so in the **Job Scripts** tab. For more information, see Use VBScript (page [307](#)).

Steps

- 1 Click the **Dest Selection** tab.
- 2 Select one of the following options in the **Type of selection** section:
 - **Select All Records** - all records in the destination file are selected.
 - **Select First N records** - the first to the Nth records are selected, where N represents the total number of records to select. Indicate the number of records in the **Total** field.
 - **Range of records** - all records within the specified range are selected. Define the range in the **Start** and **End** fields.

- **Every Nth record** - only each Nth record is selected, where N represents the multiple at which to select records. Define the Nth number in the **Nth** field and at which record to start the multiple count in the **Start At** field. For example, if the Nth number is 5 and the Start At number is 1, every record that is a multiple of 5 is selected. Therefore, records 5, 10, 15, and 20 are selected.
- 3 To add scripts to this specific destination, click **Expression**.
The **Expression Builder** window is displayed.
 - 4 In the **Expression Builder** window, click **OK** when complete.
 - 5 Click **Apply**.
 - 6 Save the .XJB file.

Marex Group FileBound On-Demand/On-Site

EXCHANGEit integrates with FileBound On-Site (local) and On-Demand (web hosted) 5.4.2. The configuration process is the same for both On-Demand and On-Site.

Destination Setup for Marex Group FileBound On-Demand/On-Site

Steps

- 1 Click the **Dest. Setup** tab.
- 2 Click **Configure Destination**. The **Select Destination Type** window is displayed.
- 3 Select **Imaging Applications**. The supported imaging applications are displayed.
To assist in ensuring that the selected Imaging Application meets currently supported version requirements, the **View Certified Versions** button is available. Click to access additional information on the AnyDoc Software website regarding supported Imaging Applications.
- 4 Select **Marex Group FileBound On-Demand** or **On-Site** and click **Next**.
The **FileBound Log In and Server Setup** window is displayed.
- 5 Do one of the following:
 - Enter your FileBound **Username** and **Password**.
 - Select the **Windows User Account** check box.
- 6 Enter the **Server** to connect to and Click **Next**.
The **Select A FileBound Project** window is displayed.
- 7 Select the destination project and click **Finish**.

Destinations

The **Dest. Setup** tab is displayed.



If it is necessary to change the setup, click **Edit Configuration** and repeat the setup process again.

Destination Mappings for Marex Group FileBound On-Demand/On-Site

If there are no mapped index fields, the documents are classified as un-indexed documents. Unindexed documents are routed to an Unindexed Document directory within FileBound; they are not put into the intended project as unindexed.

The following Target options are not index fields and are unique to the Marex Group FileBound mappings:

- Separators and Dividers
These options map values to the Separators and Dividers that are specified in FileBound.
- Route To
This field allows Ad Hoc routing in the Filebound **Workflow Manager** process. Unindexed documents cannot be routed within the **Workflow Manager** process; they must be indexed prior to being routed.

Steps

- 1 Click the **Dest. Mappings** tab.
- 2 Map the **Source Fields** in the left pane to the appropriate destination or **Target Fields** in the right pane by dragging and dropping each source field into the associated target field.
OR
Click **Automap** to have EXCHANGEit automatically map fields. Source field are mapped to target fields that have similar names.
- 3 Ensure that the **Type** and **Length** fields are correct.
- 4 If any changes occurred in the source or destination, click **Refresh Fields** to update the Dest. Mappings tab.
The **Refresh Selection** window is displayed.
- 5 Select all applicable options and click **OK**:
 - Select the **Source Fields** check box if the source has changed.
The **Source Fields** grid is refreshed.
 - Select the **Destination Fields** check box if the destination has changed.

- The **Target Fields** grid is refreshed.
- 6 To unmap a source and target field, select the target field and click **Unmap**.
 - 7 To unmap all target fields, click **Unmap All**.
 - 8 To view a report of the current mappings, click **Report** and select where the report should be displayed. Options include:
 - **Screen**
The report is displayed on the screen in the **Report** window. Click **Close**.
 - **File**
Specify the name and location to save the report and click **Save**. The file is saved as a .TXT file.
 - **Printer**
Specify the print options and click **OK**.

The report displays all of the information within the target field grid, such as the source field mapped to the target field, type and length. Use the report to identify problems occurring in the destination and to view the results of the source-to-target field mappings.

Destination Options for Marex Group FileBound On-Demand/On-Site

Most of the values specified in the Destination Setup wizard can be changed on the Dest. Options tab. Some fields might be displayed on this tab for informational purposes only and cannot be changed without deleting the destination and recreating it.

Login

Option	Description
Username	Username used to log into FileBound.
Password	Password used to log into FileBound.
Server	Enter the FileBound server to connect to.
Windows User Account	Select this check box to log into FileBound with your Windows username. This only applies if the account was configured in FileBound.
Test Login	Click to confirm that the specified login information is valid.

Destinations

Option	Description
Merge Duplicate Files	Select this check box to merge duplicate files in FileBound into one file.
Error Threshold	Enter the number of errors that can occur while processing a job. When this limit is reached the job is stopped.

Destination Selection for Marex Group FileBound On-Demand/On-Site

The Dest. Selection tab determines which records to transfer to the destination. VBScript can also be added to this specific destination from this tab. If implementing VBScript in all the destinations, do so in the **Job Scripts** tab. For more information, see Use VBScript (page [307](#)).

Steps

- 1 Click the **Dest Selection** tab.
- 2 Select one of the following options in the **Type of selection** section:
 - **Select All Records** - all records in the destination file are selected.
 - **Select First N records** - the first to the Nth records are selected, where N represents the total number of records to select. Indicate the number of records in the **Total** field.
 - **Range of records** - all records within the specified range are selected. Define the range in the **Start** and **End** fields.
 - **Every Nth record** - only each Nth record is selected, where N represents the multiple at which to select records. Define the Nth number in the **Nth** field and at which record to start the multiple count in the **Start At** field. For example, if the Nth number is 5 and the Start At number is 1, every record that is a multiple of 5 is selected. Therefore, records 5, 10, 15, and 20 are selected.
- 3 To add scripts to this specific destination, click **Expression**.
The **Expression Builder** window is displayed.
- 4 In the **Expression Builder** window, click **OK** when complete.
- 5 Click **Apply**.
- 6 Save the .XJB file.

Microsoft SharePoint

The option is given to export source information to a Microsoft® SharePoint 2007, 2010 or 2013 destination.

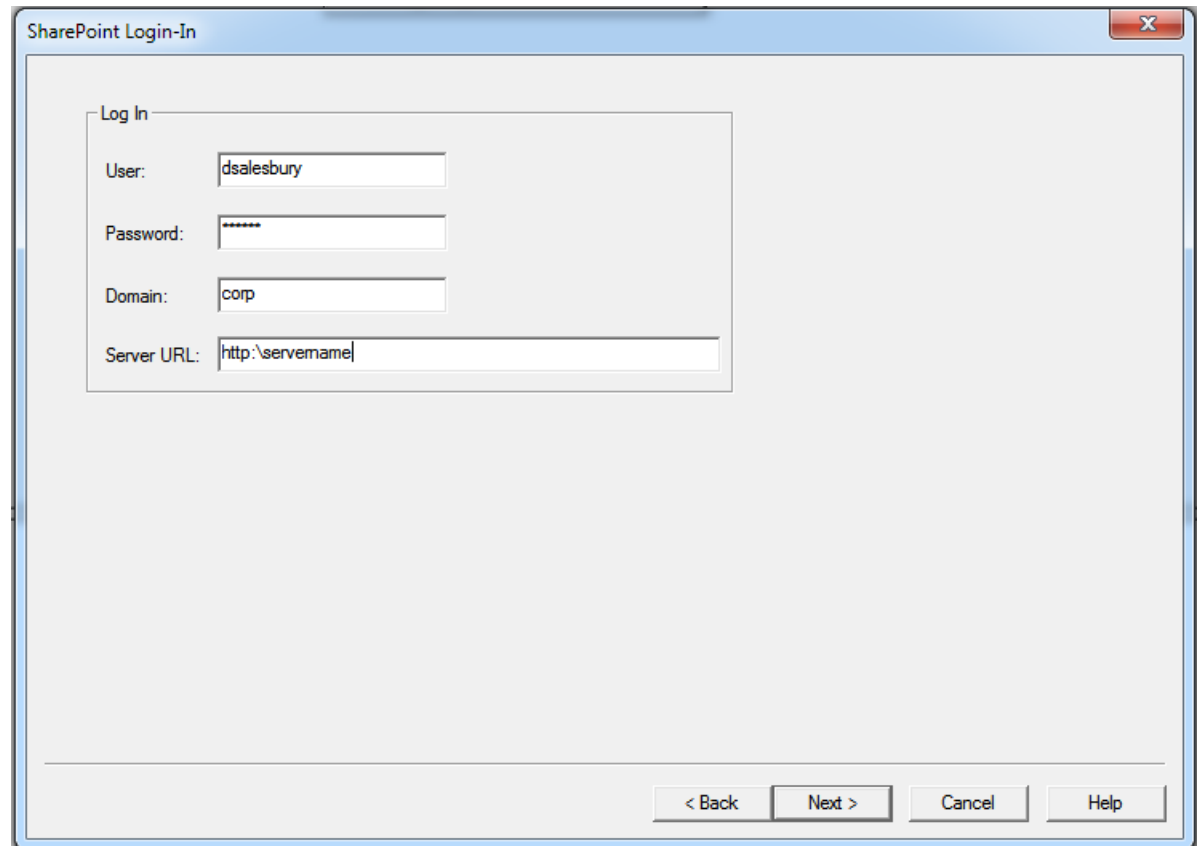
Destination Setup for Microsoft SharePoint

Steps

- 1 Click the **Dest. Setup** tab.
- 2 Click **Configure Destination**. The **Select Destination Type** window is displayed.
- 3 Select **Imaging Applications**. The supported imaging applications are displayed.
To assist in ensuring that the selected Imaging Application meets currently supported version requirements, the **View Certified Versions** button is available. Click to access additional information on the AnyDoc Software website regarding supported Imaging Applications.
- 4 Select **SharePoint** and click **Next**.

Destinations

The **SharePoint Log-In** window is displayed.

A screenshot of the 'SharePoint Login-In' window. The window has a title bar with the text 'SharePoint Login-In' and a close button (X). Inside the window, there is a 'Log In' section with four input fields: 'User:' containing 'dsalesbury', 'Password:' containing six asterisks, 'Domain:' containing 'corp', and 'Server URL:' containing 'http://servername'. At the bottom of the window, there are four buttons: '< Back', 'Next >', 'Cancel', and 'Help'.

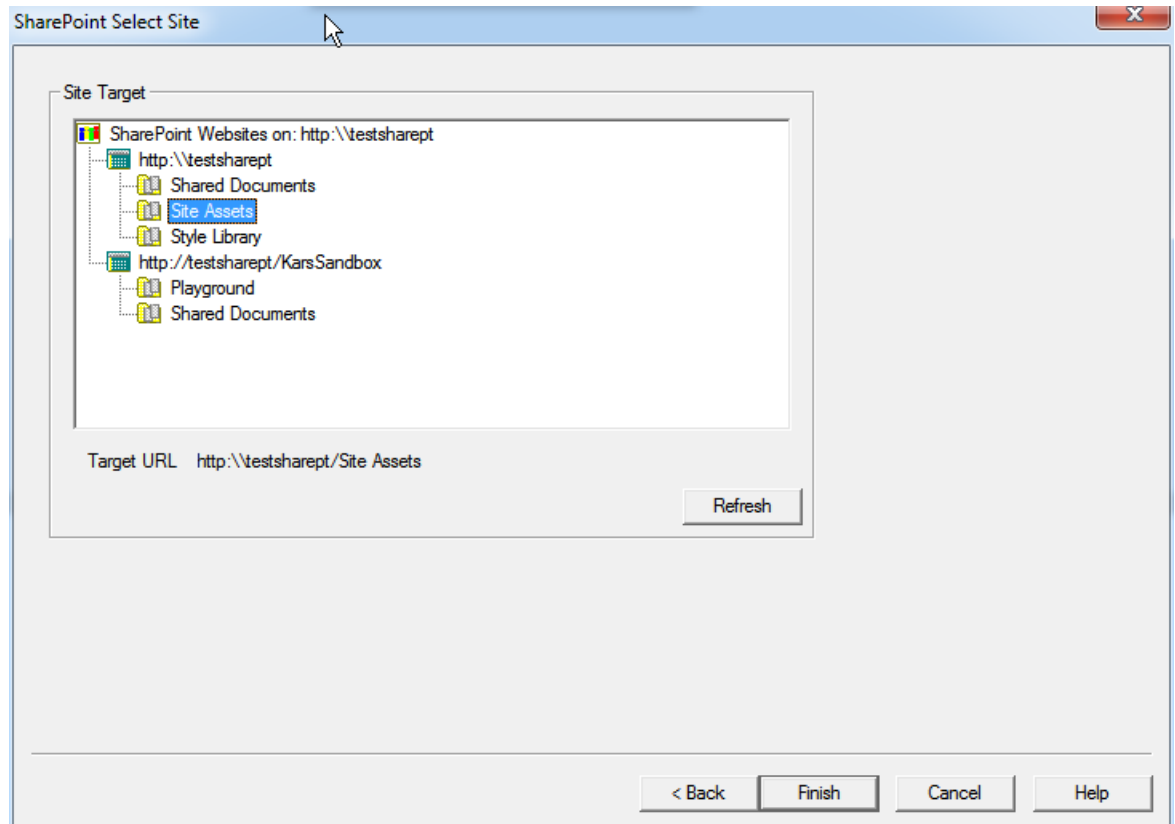
5 Enter the following system login information:

- **User Name**
- **Password**
- **Domain**
- **Home Server**

Name of the SharePoint Server url to connect to

6 Click **Next**.

The **SharePoint Select Site** window is displayed and lists all available document libraries. Within each Document Library are the folders that are available to import the source data into.



- 7 Select a folder.
The **Target URL** is displayed.
- 8 Click **Finish**.



If it is necessary to change the setup, click **Edit Configuration** and repeat the setup process again.

Destination Mappings for Microsoft SharePoint

Steps

- 1 Click the **Dest. Mappings** tab.
- 2 Map the **Source Fields** in the left pane to the appropriate destination or **Target Fields** in the right pane by dragging and dropping each source field into the associated target field.
OR

Destinations

- 3 Click **Automap** to have EXCHANGEit automatically map fields. Source field are mapped to target fields that have similar names.
- 4 If any changes occurred in the source or destination, click **Refresh Fields** to update the Dest. Mappings tab.
The **Refresh Selection** window is displayed.
- 5 Select all applicable options and click **OK**:
 - Select the **Source Fields** check box if the source has changed.
The **Source Fields** grid is refreshed.
 - Select the **Destination Fields** check box if the destination has changed.
 - The **Target Fields** grid is refreshed.
- 6 To view a report of the current mappings, click **Report** and select where the report should be displayed. Options include:
 - **Screen**
The report is displayed on the screen in the **Report** window. Click **Close**.
 - **File**
Specify the name and location to save the report and click **Save**. The file is saved as a .TXT file.
 - **Printer**
Specify the print options and click **OK**.
The report displays all of the information within the target field grid, such as the source field mapped to the target field, type and length. Use the report to identify problems occurring in the destination and to view the results of the source-to-target field mappings.

Destination Options for Microsoft SharePoint

Most of the values specified in the Destination Setup wizard can be changed on the Dest. Options tab. Some fields might be displayed on this tab for informational purposes only and cannot be changed without deleting the destination and recreating it.

Option	Description
Error Threshold	Enter the number of errors that can occur while processing a job. When this limit is reached the job is stopped.
Server URL	Enter the server to connect to.

Option	Description
Auto Login	Select this check box to automatically logon to the server with the system login credentials.
Delete Image File When Update Fails	Select this check box to delete orphan image files when data is not transferred successfully.

Destination Selection for Microsoft SharePoint

The Dest. Selection tab determines which records to transfer to the destination. VBScript can also be added to this specific destination from this tab. If implementing VBScript in all the destinations, do so in the **Job Scripts** tab. For more information, see Use VBScript (page [307](#)).

Steps

- 1 Click the **Dest Selection** tab.
- 2 Select one of the following options in the **Type of selection** section:
 - **Select All Records** - all records in the destination file are selected.
 - **Select First N records** - the first to the Nth records are selected, where N represents the total number of records to select. Indicate the number of records in the **Total** field.
 - **Range of records** - all records within the specified range are selected. Define the range in the **Start** and **End** fields.
 - **Every Nth record** - only each Nth record is selected, where N represents the multiple at which to select records. Define the Nth number in the **Nth** field and at which record to start the multiple count in the **Start At** field. For example, if the Nth number is 5 and the Start At number is 1, every record that is a multiple of 5 is selected. Therefore, records 5, 10, 15, and 20 are selected.
- 3 To add scripts to this specific destination, click **Expression**.
The **Expression Builder** window is displayed.
- 4 In the **Expression Builder** window, click **OK** when complete.
- 5 Click **Apply**.
- 6 Save the .XJB file.

Open Text Alchemy

Destination Setup for Open Text Alchemy

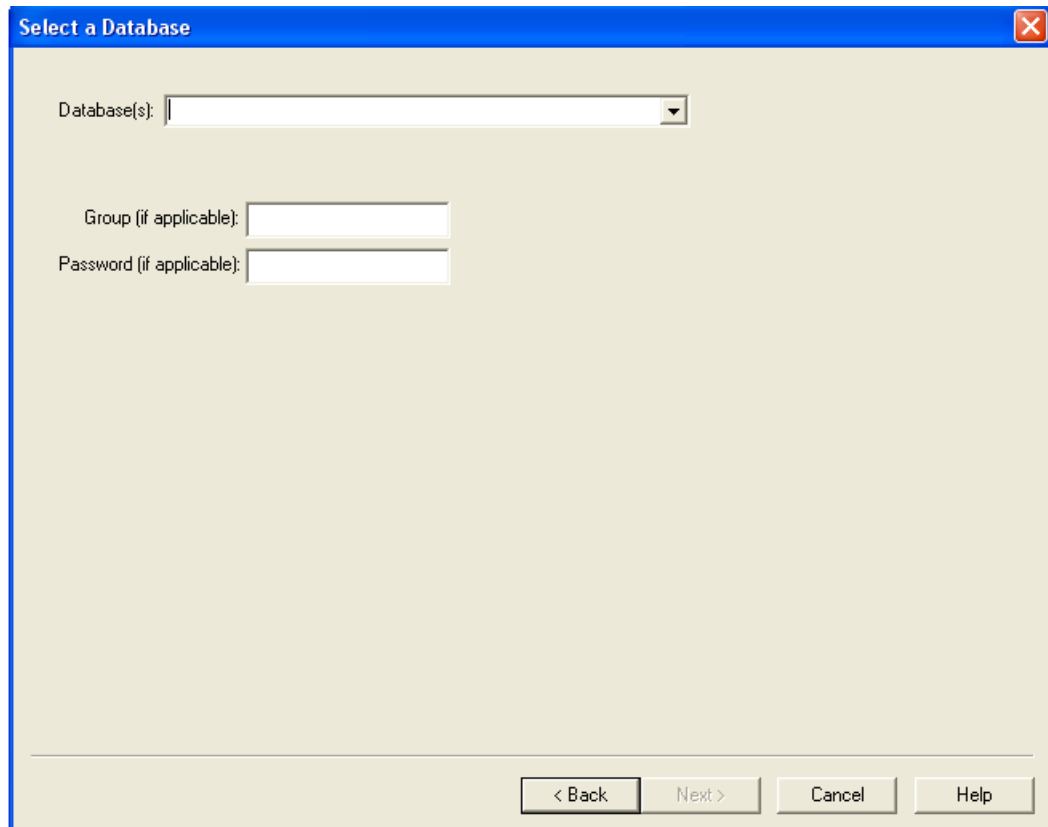
Steps

- 1 Click the **Dest. Setup** tab.
- 2 Click **Configure Destination**. The **Select Destination Type** window is displayed.
- 3 Select **Imaging Applications**. The supported imaging applications are displayed.

To assist in ensuring that the selected Imaging Application meets currently supported version requirements, the **View Certified Versions** button is available. Click to access additional information on the AnyDoc Software website regarding supported Imaging Applications.

- 4 Select **Alchemy** and click **Next**.

The **Select a Database** window is displayed.



- 5 Select a **Database** from the drop down list.

- 6 Enter the **Group** and **Password** if applicable and click **Next**.
The **Select a Folder** window is displayed.

- 7 Select the folder and click **Finish**.
The **Dest. Setup** tab is displayed.



If it is necessary to change the setup, click **Edit Configuration** and repeat the setup process again.

Destination Mappings for Open Text Alchemy

Steps

- 1 Click the **Dest. Mappings** tab.
- 2 Map the **Source Fields** in the left pane to the appropriate destination or **Target Fields** in the right pane by dragging and dropping each source field into the associated target field.
OR
Click **Automap** to have EXCHANGEit automatically map fields. Source field are mapped to target fields that have similar names.
- 3 Ensure that the **Type** and **Length** fields are correct.
- 4 If necessary, click **Purge Dest** to delete all records in the destination.
- 5 If any changes occurred in the source or destination, click **Refresh Fields** to update the Dest. Mappings tab.
The **Refresh Selection** window is displayed.
- 6 Select all applicable options and click **OK**:
 - Select the **Source Fields** check box if the source has changed.
The **Source Fields** grid is refreshed.
 - Select the **Destination Fields** check box if the destination has changed.
 - The **Target Fields** grid is refreshed.
- 7 If necessary, designate unique key fields in the destination. Key fields are fields that must contain a unique value in each record. Click the number in the **Target Fields** grid that contains the key field and click the **Key** button. A key symbol appears in the target field. Repeat this step for all key fields.
- 8 To unmap a source and target field, select the target field and click **Unmap**.
- 9 To unmap all target fields, click **Unmap All**.
- 10 To view a report of the current mappings, click **Report** and select where the report

Destinations

should be displayed. Options include:

- **Screen**

The report is displayed on the screen in the **Report** window. Click **Close**.

- **File**

Specify the name and location to save the report and click **Save**. The file is saved as a .TXT file.

- **Printer**

Specify the print options and click **OK**.

The report displays all of the information within the target field grid, such as the source field mapped to the target field, type and length. Use the report to identify problems occurring in the destination and to view the results of the source-to-target field mappings.

Destination Options for Open Text Alchemy

Most of the values specified in the Destination Setup wizard can be changed on the Dest. Options tab. Some fields might be displayed on this tab for informational purposes only and cannot be changed without deleting the destination and recreating it.

Option	Description
Error Threshold	Enter the number of errors that can occur while processing a job. When this limit is reached the job is stopped.

Destination Selection for Open Text Alchemy

The Dest. Selection tab determines which records to transfer to the destination. VBScript can also be added to this specific destination from this tab. If implementing VBScript in all the destinations, do so in the **Job Scripts** tab. For more information, see Use VBScript (page [307](#)).

Steps

- 1 Click the **Dest Selection** tab.
- 2 Select one of the following options in the **Type of selection** section:
 - **Select All Records** - all records in the destination file are selected.
 - **Select First N records** - the first to the Nth records are selected, where N represents the total number of records to select. Indicate the number of records in the **Total** field.

- **Range of records** - all records within the specified range are selected. Define the range in the **Start** and **End** fields.
 - **Every Nth record** - only each Nth record is selected, where N represents the multiple at which to select records. Define the Nth number in the **Nth** field and at which record to start the multiple count in the **Start At** field. For example, if the Nth number is 5 and the Start At number is 1, every record that is a multiple of 5 is selected. Therefore, records 5, 10, 15, and 20 are selected.
- 3 To add scripts to this specific destination, click **Expression**.
The **Expression Builder** window is displayed.
 - 4 In the **Expression Builder** window, click **OK** when complete.
 - 5 Click **Apply**.
 - 6 Save the .XJB file.

Open Text eDocs (Hummingbird) DM

Images can be imported into this destination to do the following:

- Batch process image files to the Hummingbird DM Server.
- Create a Document Profile form for each image imported into the DM Library
- Define the information to enter in the Document Profile form
- Indicate which application to assign as the viewer
- Map data from the source file to custom fields added to the Profile form

Before Creating the Job

Gather the following information before creating a Hummingbird DM job:

- Library to send the source information to
- Application viewer
- Document Type

Destination Setup for Open Text eDocs (Hummingbird) DM

Steps

- 1 Click the **Dest. Setup** tab.
- 2 Click **Configure Destination**. The **Select Destination Type** window is displayed.
- 3 Select **Imaging Applications**. The supported imaging applications are displayed.

Destinations

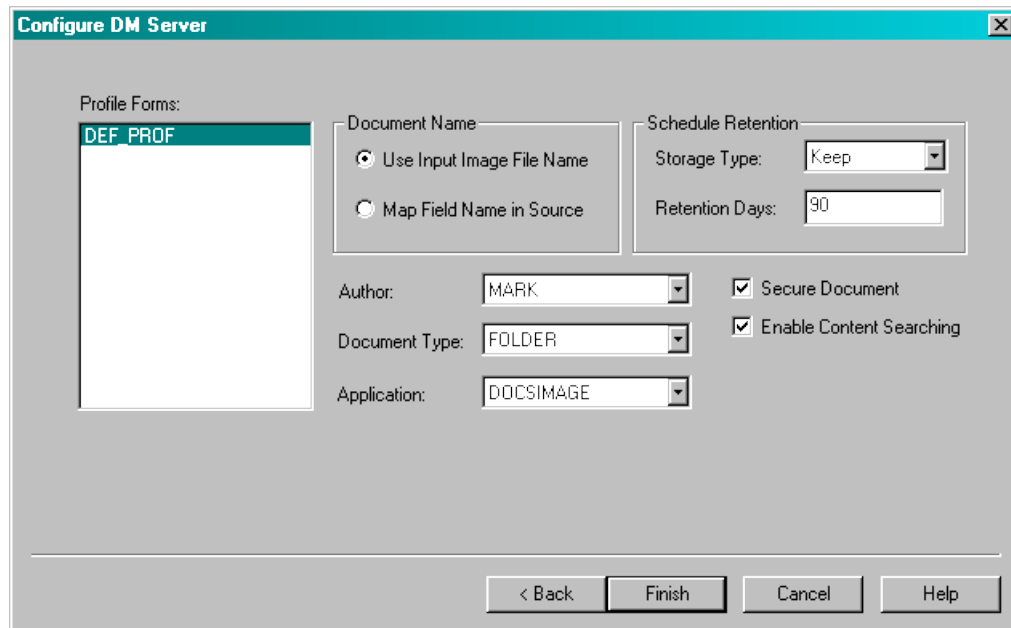
To assist in ensuring that the selected Imaging Application meets currently supported version requirements, the **View Certified Versions** button is available. Click to access additional information on the AnyDoc Software website regarding supported Imaging Applications.

- 4 Select **Hummingbird DM** and click **Next**.

The **Hummingbird DM** window is displayed.

- 5 Enter the **User Name** and **Password** used to connect to the DM Server.
- 6 Select the library on the DM Server to log into from the **Login Library** drop down list.
- 7 Click **Next**.

The **Configure DM Server** window is displayed.



The fields of the Configure DM Server window correlate to the required fields and options on the Profile form. The values entered here are imported into the Document Profile when the job is run.

- 8 Highlight the Profile form to assign to imported images in the **Profile Forms** column.
- 9 Select the method by which to assign the **Document Name**. Options include:
 - **Use Input Image File Name** - select this option to name the Document Profile | Document Name field by the image's file name. For example, 0000123.tif.
 - **Map Field Name in Source** - select this option to map a source field to the

Document Profile | Document Name field. The value in the source field is entered in the Document Name field when the job is run.

- 10 Assign the **Storage Type** and enter the number of **Retention Days**.
- 11 Select which **Author**, **Document Type** and **Application** viewer to assign to the Document Profile.
- 12 Keep the **Secure Document** check box enabled to restrict document access.
- 13 Keep the **Enable Content Searching** check box enabled to allow users to perform a full-text search on the content of the image and Document Profile.
- 14 Click **Finish**.
The **Dest. Setup** tab is displayed.

Destination Mappings for OpenText eDocs (Hummingbird) DM

The Target Fields available in the Dest. Mappings tab depend on the Document Name option selected in the Dest. Setup tab.

- If the Use Input Image File Name option was selected, then only custom fields added to the Profile form are available for mapping.
- If the Map Field Name in Source option was selected, then a DOCNAME field as well as custom fields in the Profile form are available for mapping. Select a source field to map to the DOCNAME field. The value in the source field is used to name the Document Profile.

Steps

- 1 Click the **Dest. Mappings** tab.
- 2 Map the **Source Fields** in the left pane to the appropriate destination or **Target Fields** in the right pane by dragging and dropping each source field into the associated target field.
OR
Click **Automap** to have EXCHANGEit automatically map fields. Source field are mapped to target fields that have similar names.
- 3 Ensure that the **Type** and **Length** fields are correct.
- 4 If necessary, click **Purge Dest** to delete all records in the destination.
- 5 If any changes occurred in the source or destination, click **Refresh Fields** to update the Dest. Mappings tab.
The **Refresh Selection** window is displayed.
- 6 Select all applicable options and click **OK**:

Destinations

- Select the **Source Fields** check box if the source has changed.
The **Source Fields** grid is refreshed.
 - Select the **Destination Fields** check box if the destination has changed.
 - The **Target Fields** grid is refreshed.
- 7 If necessary, designate unique key fields in the destination. Key fields are fields that must contain a unique value in each record. Click the number in the **Target Fields** grid that contains the key field and click the **Key** button. A key symbol appears in the target field. Repeat this step for all key fields.
 - 8 To unmap a source and target field, select the target field and click **Unmap**.
 - 9 To unmap all target fields, click **Unmap All**.
 - 10 To view a report of the current mappings, click **Report** and select where the report should be displayed. Options include:
 - **Screen**
The report is displayed on the screen in the **Report** window. Click **Close**.
 - **File**
Specify the name and location to save the report and click **Save**. The file is saved as a .TXT file.
 - **Printer**
Specify the print options and click **OK**.The report displays all of the information within the target field grid, such as the source field mapped to the target field, type and length. Use the report to identify problems occurring in the destination and to view the results of the source-to-target field mappings.

Destination Options for OpenText eDocs (Hummingbird) DM

Most of the values specified in the Destination Setup wizard can be changed on the Dest. Options tab. Some fields might be displayed on this tab for informational purposes only and cannot be changed without deleting the destination and recreating it. Changes to the Document Profile settings are implemented the next time the job is run. If the Library or Profile Form must be changed, it is necessary to reset the source. For more information, see Reset Source Nodes (page [286](#)).

Document Name

Option	Description
--------	-------------

Option	Description
Use Input Image File Name	Select this option to name the Document Profile Document Name field by the image's file name. For example, 0000123.tif.
Map Field Name in Source	Select this option to map a source field to the Document Profile Document Name field. The value in the source field is entered in the Document Name field when the job is run.

Schedule Retention

Option	Description
Storage Type	
Retention Days	Specify the number of days that documents must be kept.

Option	Description
Author	
Document Type	Select the type of Hummingbird document.
Application	
Secure Document	Select this check box to restrict document access
Enable Content Searching	Select this check box to allow users to perform a full-text search on the content of the image and Document Profile.

Destination Selection for OpenText eDocs (Hummingbird) DM

The Dest. Selection tab determines which records to transfer to the destination. VBScript can also be added to this specific destination from this tab. If implementing VBScript in all the destinations, do so in the **Job Scripts** tab. For more information, see [Use VBScript \(page 307\)](#).

Steps

- 1 Click the **Dest Selection** tab.
- 2 Select one of the following options in the **Type of selection** section:
 - **Select All Records** - all records in the destination file are selected.
 - **Select First N records** - the first to the Nth records are selected, where N

Destinations

represents the total number of records to select. Indicate the number of records in the **Total** field.

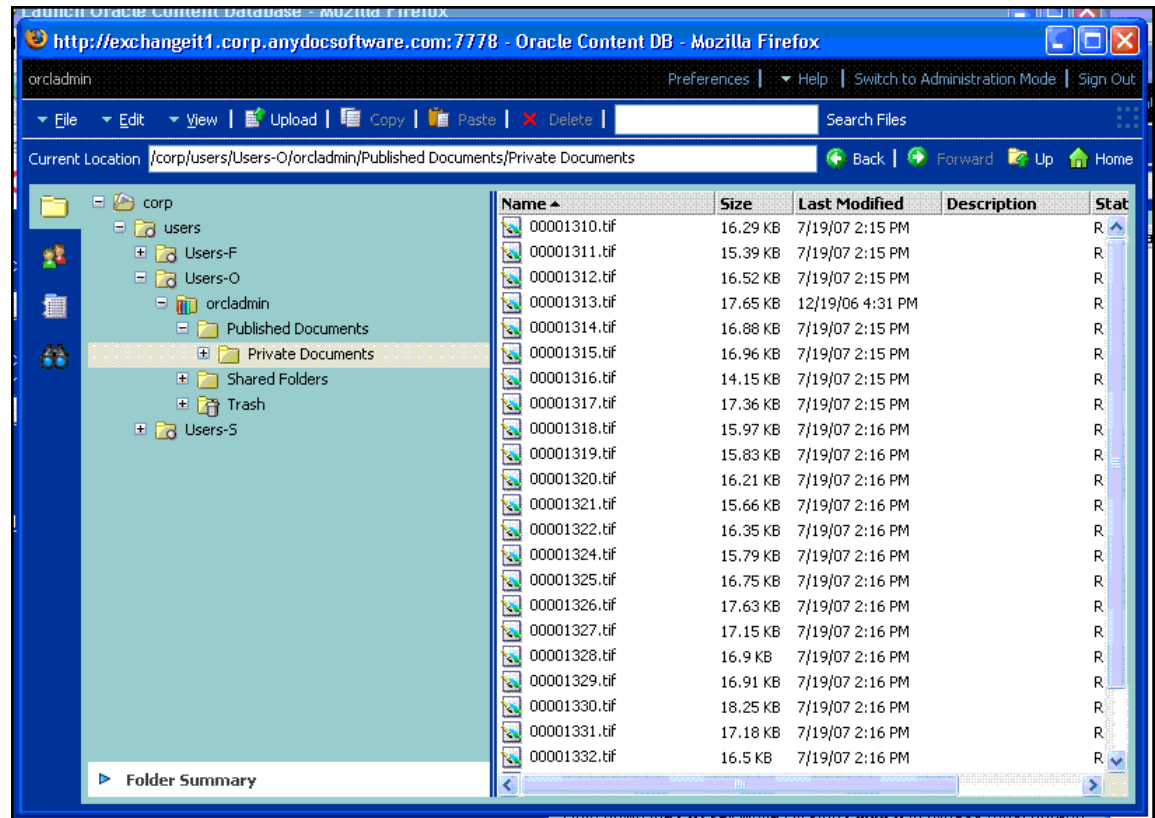
- **Range of records** - all records within the specified range are selected. Define the range in the **Start** and **End** fields.
 - **Every Nth record** - only each Nth record is selected, where N represents the multiple at which to select records. Define the Nth number in the **Nth** field and at which record to start the multiple count in the **Start At** field. For example, if the Nth number is 5 and the Start At number is 1, every record that is a multiple of 5 is selected. Therefore, records 5, 10, 15, and 20 are selected.
- 3 To add scripts to this specific destination, click **Expression**.
The **Expression Builder** window is displayed.
 - 4 In the **Expression Builder** window, click **OK** when complete.
 - 5 Click **Apply**.
 - 6 Save the .XJB file.

Oracle 10G Content DB

The Oracle Content Database is a large multi-server system with a Web interface. It will store any type of file or object and has work flow capabilities, but no built in record organizing.

The Content Database works with another Oracle component, the Records Database, to form a traditional imaging and data system. The Content Database is organized by folders while the Record Database is organized by record categories. Bridging these folders with categories is achieved through EXCHANGEit.

The screen shown below displays Oracle folders from the Oracle user interface. Each folder can be configured with a record category from the Oracle Records database. In the screen below, *.tif files are already loaded as a result of EXCHANGEit.



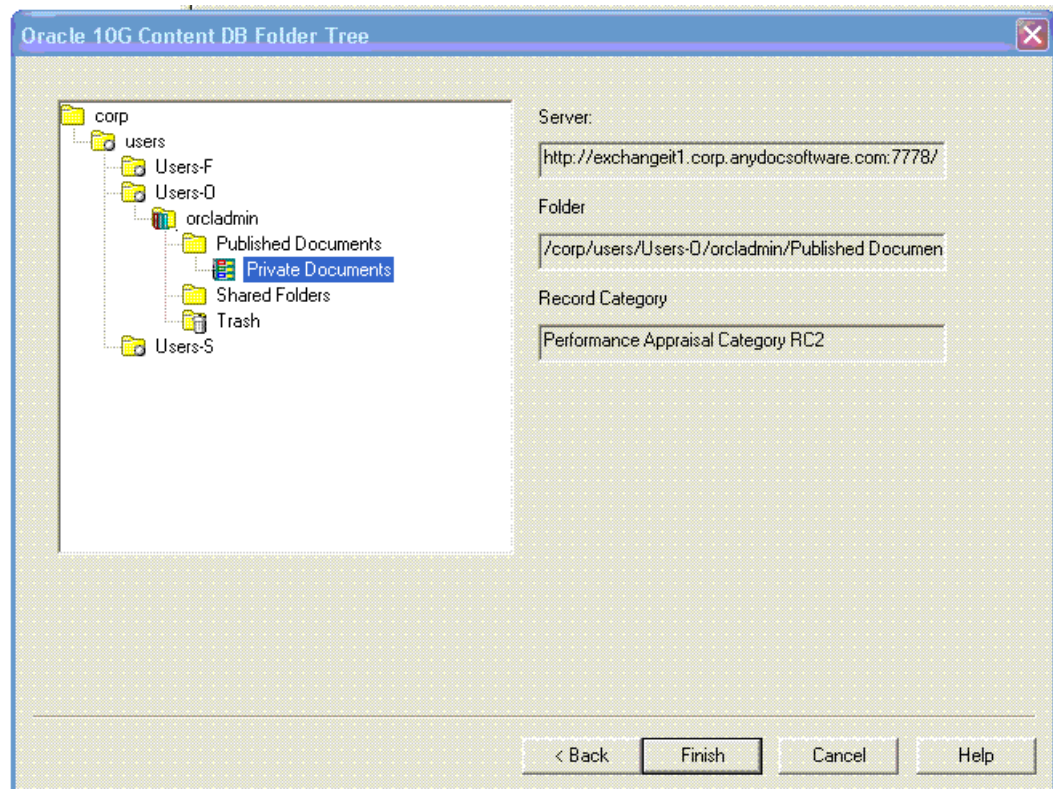
Destination Setup for Oracle 10G Content DB

Steps

- 1 Click the **Dest. Setup** tab.
- 2 Click **Configure Destination**. The **Select Destination Type** window is displayed.
- 3 Select **Imaging Applications**. The supported imaging applications are displayed.
To assist in ensuring that the selected Imaging Application meets currently supported version requirements, the **View Certified Versions** button is available. Click to access additional information on the AnyDoc Software website regarding supported Imaging Applications.
- 4 Select **Oracle 10G Content DB** and click **Next**.
The **Oracle 10G Content DB Folder Tree** window is displayed.
- 5 Enter the following information:

Destinations

- Username
 - Password
 - Server URL
- 6 Usable folders will show a Record Category graphic on them. A warning message is displayed if a folder is selected that has no corresponding Record Category.



When you select the folder, the Folder and Record Category fields are automatically filled in with the names of the respective locations.

- 7 Click **Finish**.

The **Dest. Setup** tab is displayed.



If it is necessary to change the setup, click **Edit Configuration** and repeat the setup process again.

Destination Mappings for Oracle 10G Content DB

Steps

- 1 Click the **Dest. Mappings** tab.

- 2 Map the **Source Fields** in the left pane to the appropriate destination or **Target Fields** in the right pane by dragging and dropping each source field into the associated target field.

OR

Click **Automap** to have EXCHANGEit automatically map fields. Source field are mapped to target fields that have similar names.

- 3 Ensure that the **Type** and **Length** fields are correct.
- 4 If necessary, click **Purge Dest** to delete all records in the destination.
- 5 If any changes occurred in the source or destination, click **Refresh Fields** to update the Dest. Mappings tab.

The **Refresh Selection** window is displayed.

- 6 Select all applicable options and click **OK**:

- Select the **Source Fields** check box if the source has changed.
The **Source Fields** grid is refreshed.
- Select the **Destination Fields** check box if the destination has changed.
- The **Target Fields** grid is refreshed.

- 7 To unmap a source and target field, select the target field and click **Unmap**.
- 8 To unmap all target fields, click **Unmap All**.

- 9 To view a report of the current mappings, click **Report** and select where the report should be displayed. Options include:

- **Screen**

The report is displayed on the screen in the **Report** window. Click **Close**.

- **File**

Specify the name and location to save the report and click **Save**. The file is saved as a .TXT file.

- **Printer**

Specify the print options and click **OK**.

The report displays all of the information within the target field grid, such as the source field mapped to the target field, type and length. Use the report to identify problems occurring in the destination and to view the results of the source-to-target field mappings.

Destinations

Destination Options for Oracle 10G Content DB

Most of the values specified in the Destination Setup wizard can be changed on the Dest. Options tab. Some fields might be displayed on this tab for informational purposes only and cannot be changed without deleting the destination and recreating it.

Option	Description
Error Threshold	Enter the number of errors that can occur while processing a job. When this limit is reached the job is stopped.

Destination Selection for Oracle 10G Content DB

The Dest. Selection tab determines which records to transfer to the destination. VBScript can also be added to this specific destination from this tab. If implementing VBScript in all the destinations, do so in the **Job Scripts** tab. For more information, see Use VBScript (page [307](#)).

Steps

- 1 Click the **Dest Selection** tab.
- 2 Select one of the following options in the **Type of selection** section:
 - **Select All Records** - all records in the destination file are selected.
 - **Select First N records** - the first to the Nth records are selected, where N represents the total number of records to select. Indicate the number of records in the **Total** field.
 - **Range of records** - all records within the specified range are selected. Define the range in the **Start** and **End** fields.
 - **Every Nth record** - only each Nth record is selected, where N represents the multiple at which to select records. Define the Nth number in the **Nth** field and at which record to start the multiple count in the **Start At** field. For example, if the Nth number is 5 and the Start At number is 1, every record that is a multiple of 5 is selected. Therefore, records 5, 10, 15, and 20 are selected.
- 3 To add scripts to this specific destination, click **Expression**.
The **Expression Builder** window is displayed.
- 4 In the **Expression Builder** window, click **OK** when complete.
- 5 Click **Apply**.
- 6 Save the .XJB file.

Oracle I/PM 7.7 & Stellent IBPM 7.6

Oracle Imaging and Process Management (I/PM) was previously known as Stellent IBPM 7.6. Both of these products are supported by EXCHANGEit. The setup process is the same for both applications.

Destination Setup for Oracle I/PM 7.7 & Stellent IBPM 7.6

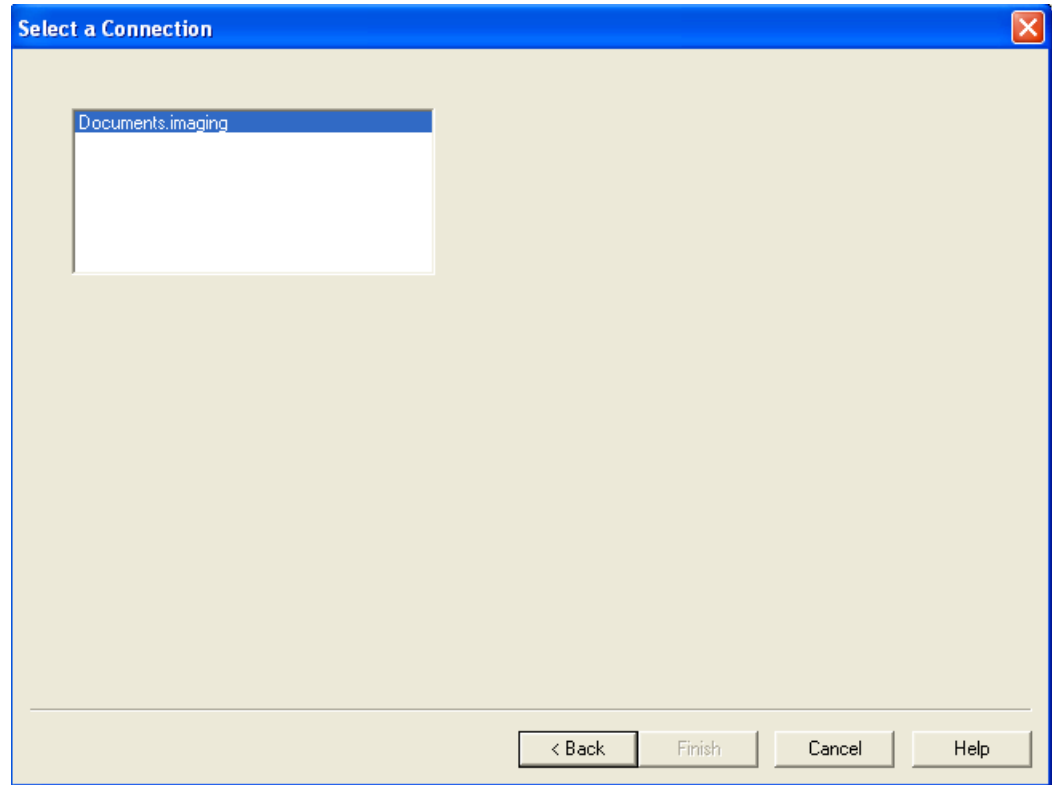
Steps

- 1 Click the **Dest. Setup** tab.
- 2 Click **Configure Destination**. The **Select Destination Type** window is displayed.
- 3 Select **Imaging Applications**. The supported imaging applications are displayed.

To assist in ensuring that the selected Imaging Application meets currently supported version requirements, the **View Certified Versions** button is available. Click to access additional information on the AnyDoc Software website regarding supported Imaging Applications.
- 4 Select Stellent or Oracle I/PM and click **Next**.
The **Login** window is displayed.
- 5 Enter the login information in the **User Name** and **Password** fields and click **OK**.

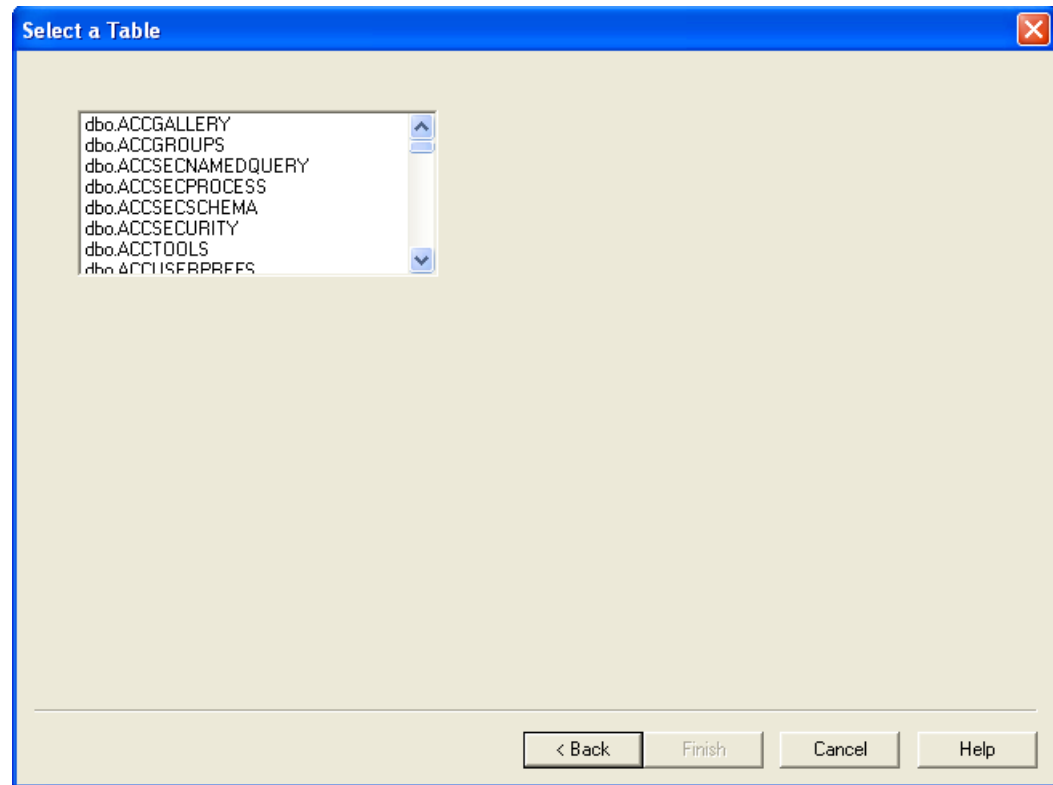
Destinations

The **Select a Connection** window is displayed.




- 6 Select the connection from which to configure the destination and click **Next**.

The **Select a Table** window is displayed.



- 7 Select the table associated with the connection and click **Finish**.

The **Dest. Setup** tab is displayed.

 If it is necessary to change the setup, click **Edit Configuration** and repeat the setup process again.

Destination Mappings for Oracle I/PM 7.7 & Stellent IBPM 7.6

Steps

- 1 Click the **Dest. Mappings** tab.
- 2 Map the **Source Fields** in the left pane to the appropriate destination or **Target Fields** in the right pane by dragging and dropping each source field into the associated target field.
OR
Click **Automap** to have EXCHANGEit automatically map fields. Source field are mapped to target fields that have similar names.
- 3 Ensure that the **Type** and **Length** fields are correct.

Destinations

- 4 If necessary, click **Purge Dest** to delete all records in the destination.
- 5 If any changes occurred in the source or destination, click **Refresh Fields** to update the Dest. Mappings tab.
The **Refresh Selection** window is displayed.
- 6 Select all applicable options and click **OK**:
 - Select the **Source Fields** check box if the source has changed.
The **Source Fields** grid is refreshed.
 - Select the **Destination Fields** check box if the destination has changed.
 - The **Target Fields** grid is refreshed.
- 7 If necessary, designate unique key fields in the destination. Key fields are fields that must contain a unique value in each record. Click the number in the **Target Fields** grid that contains the key field and click the **Key** button. A key symbol appears in the target field. Repeat this step for all key fields.
- 8 To unmap a source and target field, select the target field and click **Unmap**.
- 9 To unmap all target fields, click **Unmap All**.
- 10 To view a report of the current mappings, click **Report** and select where the report should be displayed. Options include:
 - **Screen**
The report is displayed on the screen in the **Report** window. Click **Close**.
 - **File**
Specify the name and location to save the report and click **Save**. The file is saved as a .TXT file.
 - **Printer**
Specify the print options and click **OK**.
The report displays all of the information within the target field grid, such as the source field mapped to the target field, type and length. Use the report to identify problems occurring in the destination and to view the results of the source-to-target field mappings.

Destination Options for Oracle I/PM 7.7 & Stellent IBPM 7.6

Most of the values specified in the Destination Setup wizard can be changed on the Dest. Options tab. Some fields might be displayed on this tab for informational purposes only and cannot be changed without deleting the destination and recreating it.

Option	Description
Error Threshold	Enter the number of errors that can occur while processing a job. When this limit is reached the job is stopped.

Destination Selection for Oracle I/PM 7.7 & Stellent IBPM 7.6

The Dest. Selection tab determines which records to transfer to the destination. VBScript can also be added to this specific destination from this tab. If implementing VBScript in all the destinations, do so in the **Job Scripts** tab. For more information, see Use VBScript (page [307](#)).

Steps

- 1 Click the **Dest Selection** tab.
- 2 Select one of the following options in the **Type of selection** section:
 - **Select All Records** - all records in the destination file are selected.
 - **Select First N records** - the first to the Nth records are selected, where N represents the total number of records to select. Indicate the number of records in the **Total** field.
 - **Range of records** - all records within the specified range are selected. Define the range in the **Start** and **End** fields.
 - **Every Nth record** - only each Nth record is selected, where N represents the multiple at which to select records. Define the Nth number in the **Nth** field and at which record to start the multiple count in the **Start At** field. For example, if the Nth number is 5 and the Start At number is 1, every record that is a multiple of 5 is selected. Therefore, records 5, 10, 15, and 20 are selected.
- 3 To add scripts to this specific destination, click **Expression**.
The **Expression Builder** window is displayed.
- 4 In the **Expression Builder** window, click **OK** when complete.
- 5 Click **Apply**.
- 6 Save the .XJB file.

Saperion Enterprise Content Management (ECM)

Destination Setup for Saperion Enterprise Content Management

Destinations

(ECM)

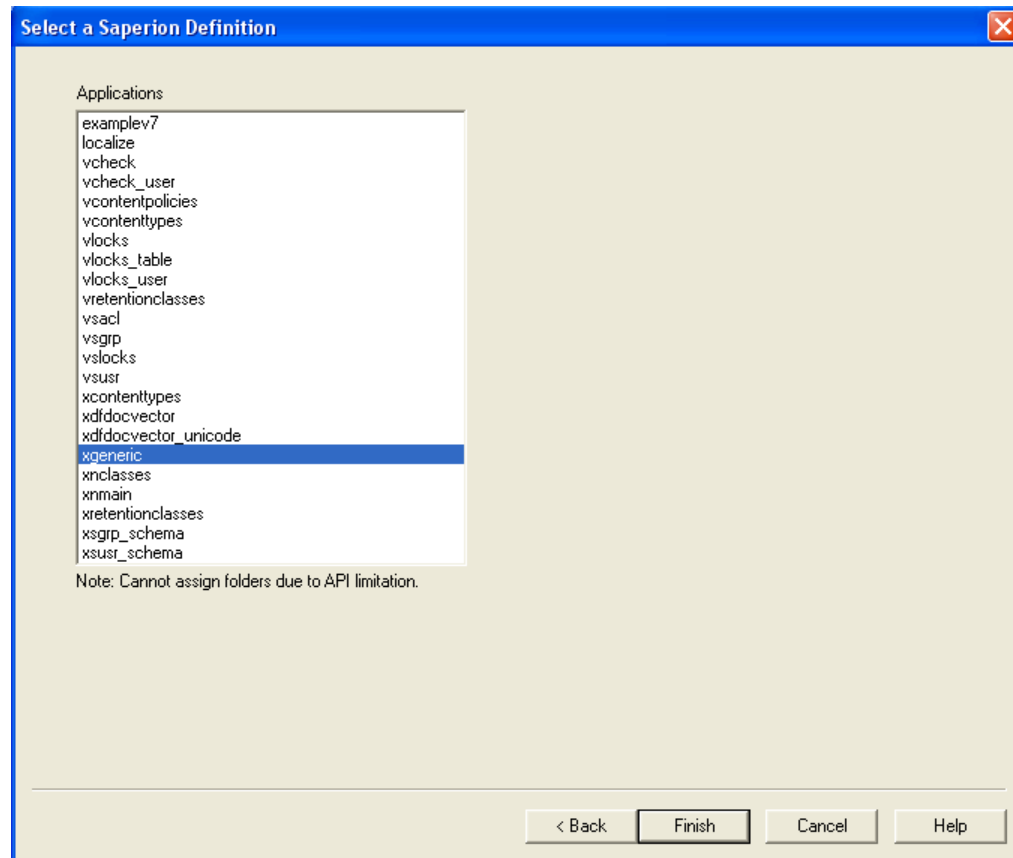
Steps

- 1 Click the **Dest. Setup** tab.
- 2 Click **Configure Destination**. The **Select Destination Type** window is displayed.
- 3 Select **Imaging Applications**. The supported imaging applications are displayed.

To assist in ensuring that the selected Imaging Application meets currently supported version requirements, the **View Certified Versions** button is available. Click to access additional information on the AnyDoc Software website regarding supported Imaging Applications.
- 4 Select **Saperion Enterprise Content Management** and click **Next**.

The **Saperion ECM Login and Server Setup** window is displayed.
- 5 Enter the Saperion **Server Address**.
- 6 Enter the login information in the **Username** and **Password** fields.
- 7 Click **Next**.

The **Select A Saperion Definition** window is displayed.



- 8 Select an **Application** and click **Finish**.

The **Dest. Setup** tab is displayed.

Destination Mappings for Saperion Enterprise Content Management (ECM)

Steps

- 1 Click the **Dest. Mappings** tab.
- 2 Map the **Source Fields** in the left pane to the appropriate destination or **Target Fields** in the right pane by dragging and dropping each source field into the associated target field.

OR

Click **Automap** to have EXCHANGEit automatically map fields. Source field are mapped to target fields that have similar names.

- 3 Ensure that the **Type** and **Length** fields are correct.

Destinations

- 4 If any changes occurred in the source or destination, click **Refresh Fields** to update the Dest. Mappings tab.
The **Refresh Selection** window is displayed.
- 5 Select all applicable options and click **OK**:
 - Select the **Source Fields** check box if the source has changed.
The **Source Fields** grid is refreshed.
 - Select the **Destination Fields** check box if the destination has changed.
 - The **Target Fields** grid is refreshed.
- 6 If necessary, designate unique key fields in the destination. Key fields are fields that must contain a unique value in each record. Click the number in the **Target Fields** grid that contains the key field and click the **Key** button. A key symbol appears in the target field. Repeat this step for all key fields.
- 7 To unmap a source and target field, select the target field and click **Unmap**.
- 8 To unmap all target fields, click **Unmap All**.
- 9 To view a report of the current mappings, click **Report** and select where the report should be displayed. Options include:
 - **Screen**
The report is displayed on the screen in the **Report** window. Click **Close**.
 - **File**
Specify the name and location to save the report and click **Save**. The file is saved as a .TXT file.
 - **Printer**
Specify the print options and click **OK**.
The report displays all of the information within the target field grid, such as the source field mapped to the target field, type and length. Use the report to identify problems occurring in the destination and to view the results of the source-to-target field mappings.

Destination Options for Saperion Enterprise Content Management (ECM)

Most of the values specified in the Destination Setup wizard can be changed on the Dest. Options tab. Some fields might be displayed on this tab for informational purposes only and cannot be changed without deleting the destination and recreating it.

Login

Option	Description
Username	Username used to log into Saperion.
Password	Password used to log into Saperion.
Server	The Saperion Server Name.
Test Login	Click to connect to the specified Saperion server.

Option	Description
Error Threshold	Enter the number of errors that can occur while processing a job. When this limit is reached the job is stopped.

Destination Selection for Saperion Enterprise Content Management (ECM)

The Dest. Selection tab determines which records to transfer to the destination. VBScript can also be added to this specific destination from this tab. If implementing VBScript in all the destinations, do so in the **Job Scripts** tab. For more information, see Use VBScript (page [307](#)).

Steps

- 1 Click the **Dest Selection** tab.
- 2 Select one of the following options in the **Type of selection** section:
 - **Select All Records** - all records in the destination file are selected.
 - **Select First N records** - the first to the Nth records are selected, where N represents the total number of records to select. Indicate the number of records in the **Total** field.
 - **Range of records** - all records within the specified range are selected. Define the range in the **Start** and **End** fields.
 - **Every Nth record** - only each Nth record is selected, where N represents the multiple at which to select records. Define the Nth number in the **Nth** field and at which record to start the multiple count in the **Start At** field. For example, if the Nth number is 5 and the Start At number is 1, every record that is a multiple of 5 is selected. Therefore, records 5, 10, 15, and 20 are selected.
- 3 To add scripts to this specific destination, click **Expression**.

Destinations

The **Expression Builder** window is displayed.

- 4 In the **Expression Builder** window, click **OK** when complete.
- 5 Click **Apply**.
- 6 Save the .XJB file.

Westbrook Technologies File Magic & Fortis

Destination Setup for Westbrook Technologies File Magic & Fortis

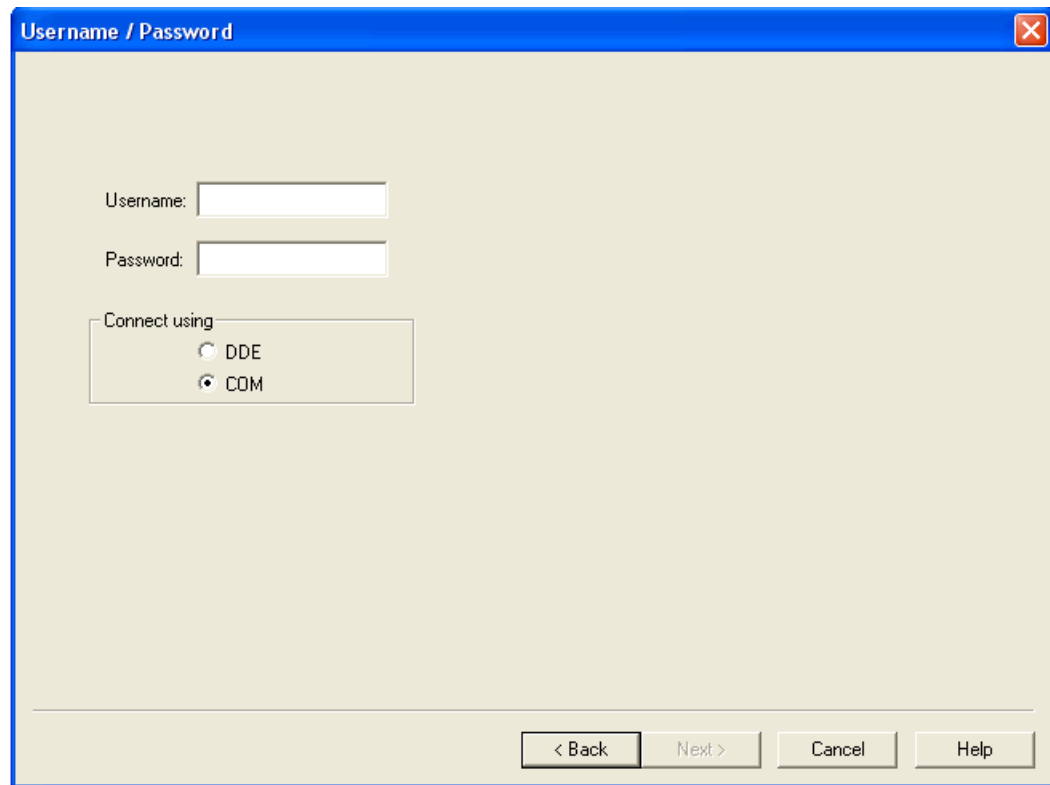
Because configuration is similar for File Magic and Fortis, the destination configuration procedures are combined. File Magic is used as the example.

Steps

- 1 Click the **Dest. Setup** tab.
- 2 Click **Configure Destination**. The **Select Destination Type** window is displayed.
- 3 Select **Imaging Applications**. The supported imaging applications are displayed.

To assist in ensuring that the selected Imaging Application meets currently supported version requirements, the **View Certified Versions** button is available. Click to access additional information on the AnyDoc Software website regarding supported Imaging Applications.
- 4 Select either **File Magic** or **Fortis** and click **Next**.

The **Username / Password** window is displayed.



- 5 Enter the File Magic or Fortis login information in the **Username** and **Password** fields.
- 6 Select a connection method. Options include **COM** or **DDE**.
- 7 Click **Next**.

The **Database / Folder** window is displayed.

- 8 Select the File Magic or Fortis database from the **Select DB** drop down list and folder and click **Next**. The **Select a Document Type** window is displayed.
- 9 Select the document type from the drop down list and click **Finish**.

The **Dest. Setup** tab is displayed.



If it is necessary to change the setup, click **Edit Configuration** and repeat the setup process again.

Destination Mappings for Westbrook Technologies File Magic & Fortis

Steps

Destinations

- 1 Click the **Dest. Mappings** tab.
- 2 Map the **Source Fields** in the left pane to the appropriate destination or **Target Fields** in the right pane by dragging and dropping each source field into the associated target field.
OR
Click **Automap** to have EXCHANGEit automatically map fields. Source fields are mapped to target fields that have similar names.
- 3 Ensure that the **Type** and **Length** fields are correct.
- 4 If necessary, click **Purge Dest** to delete all records in the destination.
- 5 If any changes occurred in the source or destination, click **Refresh Fields** to update the Dest. Mappings tab.
The **Refresh Selection** window is displayed.
- 6 Select all applicable options and click **OK**:
 - Select the **Source Fields** check box if the source has changed.
The **Source Fields** grid is refreshed.
 - Select the **Destination Fields** check box if the destination has changed.
 - The **Target Fields** grid is refreshed.
- 7 If necessary, designate unique key fields in the destination. Key fields are fields that must contain a unique value in each record. Click the number in the **Target Fields** grid that contains the key field and click the **Key** button. A key symbol appears in the target field. Repeat this step for all key fields.
- 8 To unmap a source and target field, select the target field and click **Unmap**.
- 9 To unmap all target fields, click **Unmap All**.
- 10 To view a report of the current mappings, click **Report** and select where the report should be displayed. Options include:
 - **Screen**
The report is displayed on the screen in the **Report** window. Click **Close**.
 - **File**
Specify the name and location to save the report and click **Save**. The file is saved as a .TXT file.
 - **Printer**
Specify the print options and click **OK**.

The report displays all of the information within the target field grid, such as the source field mapped to the target field, type and length. Use the report to identify problems occurring in the destination and to view the results of the source-to-target field mappings.

Destination Options for Westbrook Technologies File Magic & Fortis

Most of the values specified in the Destination Setup wizard can be changed on the Dest. Options tab. Some fields might be displayed on this tab for informational purposes only and cannot be changed without deleting the destination and recreating it. These settings are defined by Westbrook. Consult Westbrook Technical Support or AnyDoc Technical Support before changing the settings.

Option	Description
DDE Timeout	Enter the server response time limit. If the server does not respond within the amount of time specified in the DDE Timeout field, the application times out.
Import Timeout	Enter the total time allotted to importing records. If all records are not imported within the amount of time specified in the Import Timeout field, the application times out.
Quality Factor	Enter the percentage of quality to give imported records. This percentage is directly related to the image file size. Decreasing the quality factor will remove pixels from the original image to create a lower quality image and file size. Increasing the quality factor will keep more pixels in the original image and produce a higher quality image and file size.
Error Threshold	Enter the number of errors that can occur while processing a job. When this limit is reached the job is stopped.

Destination Selection for Westbrook Technologies File Magic & Fortis

The Dest. Selection tab determines which records to transfer to the destination. VBScript can also be added to this specific destination from this tab. If implementing VBScript in all the destinations, do so in the **Job Scripts** tab. For more information, see Use VBScript (page [307](#)).

Steps

- 1 Click the **Dest Selection** tab.

Destinations

- 2 Select one of the following options in the **Type of selection** section:
 - **Select All Records** - all records in the destination file are selected.
 - **Select First N records** - the first to the Nth records are selected, where N represents the total number of records to select. Indicate the number of records in the **Total** field.
 - **Range of records** - all records within the specified range are selected. Define the range in the **Start** and **End** fields.
 - **Every Nth record** - only each Nth record is selected, where N represents the multiple at which to select records. Define the Nth number in the **Nth** field and at which record to start the multiple count in the **Start At** field. For example, if the Nth number is 5 and the Start At number is 1, every record that is a multiple of 5 is selected. Therefore, records 5, 10, 15, and 20 are selected.
- 3 To add scripts to this specific destination, click **Expression**.
The **Expression Builder** window is displayed.
- 4 In the **Expression Builder** window, click **OK** when complete.
- 5 Click **Apply**.
- 6 Save the .XJB file.

Text File as a Destination


A text file is a plain ASCII file encoded in a format that most computers can read. The information can be output in a delimited format as a string of characters delimited by a specified character or in a fixed format where each field begins a specified column.

Destination Setup for a Text File



Steps

- 1 Click the **Dest. Setup** tab.
- 2 Click **Configure Destination**. The **Select Destination Type** window is displayed.
- 3 Select **Text File** and click **Next**.

The **Specify Destination Text File** window is displayed.

- 4 Review and change, if necessary, the **File Folder** where the output text file is to be written. Defaults to the **Text File Directory** defined in **Preferences | Directory and Computer Settings**. Click the Browse, , button to select a different output folder.
- 5 Specify the **Subdirectory Type**. Options include:
 - **None**
 - **Date**
 - **OCR for AnyDoc Batch ID**
Creates a subfolder in the output directory named using the OCR for AnyDocBatch Number.
 - **OCR for AnyDoc Batch Control Number**
Creates a subfolder in the output directory named using the OCR for AnyDoc Batch Control Number.
- 6 Indicate how to name the text file. Options include:

Destinations

- **Name by File** - names the output file by the name specified in the **File Name** field or click the **Browse** button, , and map to an existing file.
 - **Name by Date** - names the output file according to the date the job was processed. Additional naming options include:
 - **File Prefix** - enter a prefix to be attached before the file name, such as JOB-.
 - **Date Format Settings** - click the Browse, , button to select a different date format.
 - **File Suffix** - enter a suffix to be attached after the file name, such as -EI.
 - **File Extension** - enter a file extension for the output file. Default is TXT.
 - **Name by Input File (GTO, TXT or XML)** - names the output file with the same name as the source file. For example, if the .GTO file name is "ABC123.GTO", the output file name is "ABC123.TXT". Additional naming options include **File Prefix**, **File Suffix**, and **File Extension** as shown above.
 - **OCR for AnyDoc Batch Number**
Names the output file with the OCR for AnyDoc Batch Number.
 - **OCR for AnyDoc Batch Control Number**
Creates a subfolder in the output directory named using the OCR for AnyDoc Batch Control Number.
- 7 Select a **Type of Output** option:
- **Fixed** - Separates fields with columns and spaces.
 - **Delimited** - Separates fields with delimiters, such as commas or semicolons.
- 8 If you selected Delimited output, do the following:
- In the **String Delimiter** field, enter the delimiter character to use.
 - In the **Field Delimiter** field, select **Tab**, **Space**, or **Other**. If you select **Other**, enter the delimiter character to use.
- 9 Indicate how to identify the end of a line from the **End of Line** drop down list. Options include:
- **CR-LF** - (Carriage Return-Line Feed). Return to the beginning of the current line and automatically advance to the next line.
 - **CR** - (Carriage Return). Advance to the beginning of the next line.
 - **LF** - (Line Feed). Advance to the line below the current line without moving the

position of the cursor or print head.


- **LF-CR** - (Line Feed-Carriage Return). Advance one line below the current line and advance to the beginning of the line.
- **FF** - (Form Feed). Advance to the next form.

10 Click **Finish**. The Dest. Setup tab is displayed.

Destination Mappings for a Text File

When mapping source and destination fields, the Source Fields list can be updated to include any new fields that were added to the source file. However, the source must be refreshed on the Source Mappings tab before refreshing the source in the Dest. Mappings tab.

Steps

- 1** Click the **Dest. Mappings** tab.
- 2** Create the text file and click the Run Job button, .
- 3** Click the **View Dest** button to confirm the connection to the destination and view the information that was transferred to the destination. This option is helpful to ensure that you have selected the appropriate settings for the destination and that the information is formatted in the correct manner. A list of records appears below the Dest. Mappings tab.
- 4** Map the **Source Fields** in the left pane to the appropriate destination or **Target Fields** in the right pane by dragging and dropping each source field into the associated target field.
- 5** Ensure that the **Type** and **Length** fields are correct.
The Length field only applies to fixed length fields, not delimited fields.
- 6** If necessary, click **Purge Dest** to delete all records in the destination.
- 7** If any changes occurred in the source or destination, click **Refresh Fields** to update the Dest. Mappings tab.
The **Refresh Selection** window is displayed.
- 8** Select all applicable options and click **OK**:
 - Select the **Source Fields** check box if the source has changed.
The **Source Fields** grid is refreshed.
 - Select the **Destination Fields** check box if the destination has changed.
 - The **Target Fields** grid is refreshed.

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The Destination fields will be lost.

- 9 If necessary, designate unique key fields in the destination. Key fields are fields that must contain a unique value in each record. Click the number in the **Target Fields** grid that contains the key field and click the **Key** button. A key symbol appears in the target field. Repeat this step for all key fields.
- 10 To unmap a source and target field, select the target field and click **Unmap**.
- 11 To unmap all target fields, click **Unmap All**.
- 12 To view a report of the current mappings, click **Report** and select where the report should be displayed. Options include:
 - **Screen**
The report is displayed on the screen in the **Report** window. Click **Close**.
 - **File**
Specify the name and location to save the report and click **Save**. The file is saved as a .TXT file.
 - **Printer**
Specify the print options and click **OK**.The report displays all of the information within the target field grid, such as the source field mapped to the target field, type and length. Use the report to identify problems occurring in the destination and to view the results of the source-to-target field mappings.



Destination Options for a Text File

Most of the values specified in the Destination Setup wizard can be changed on the Dest. Options tab. Some fields might be displayed on this tab for informational purposes only and cannot be changed without deleting the destination and recreating it.

Option	Description
File Folder	Specify the directory that the output file will be saved in.

Name Output File By

Option	Description
--------	-------------

Option	Description
File	Names the output file by the name specified in this field or click the Browse button,  , and map to an existing file.
Date	Names the output file according to the date the job was processed. Click the Browse button,  , to select a date format from the Date Format Settings window. For more information, see Set Date Format Settings (page 92).
Input File Name (GTO and TXT)	Names the output file with the same file name as the source (but with the .EDI extension). The source file must be in either .GTO or .TXT format.
Batch Number	Names the output file with the batch number.
Batch Control Number	Names the output file with the batch control number.

Subdirectory Type

Option	Description
None	Select this option to save the output file in the specified File Folder without creating a subfolder.
Date	Select this option to create a subfolder using the current date in the yyymmdd format.
Batch No.	This option is only available if a batch number exists in the source file. Select this option to create a subfolder for each batch, using the batch number.
Batch Ctrl No.	This option is only available if a batch control number exists in the source file. Select this option to create a subfolder based on the batch control number.

Type Of Output

Option	Description
Fixed	Select this option to align fields in columns by width using spaces to fill in the extra characters. A field length is required on the Destination Mapping tab for each field.

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Option	Description
Delimited	<p>If selected, the fields are delimited with the before and after characters specified in the String Delimiter and Field Delimiter fields.</p> <p>The entire field is output and a field length on the Destination Mapping tab does not apply.</p>

Option	Description
Purge Destination Before Running Job	<p>Select this check box to delete files from the destination directory before processing the job.</p> <p>Clear this check box to keep the files in the destination directory before processing the job.</p>
Error Threshold	Enter the number of errors that can occur while processing a job. When this limit is reached the job is stopped.
String Delimiter	Applies if the Delimited output type is selected.
End of Line	<p>Select how to indicate the end of a line. Options include:</p> <ul style="list-style-type: none">• CR-LF - (Carriage Return-Line Feed) Return to the beginning of the current line and automatically advance to the next line.• CR - (Carriage Return) Advance to the beginning of the next line.• LF - (Line Feed) Advance one line below the current line without moving the position of the cursor or print head.• LF-CR - (Line Feed-Carriage Return) Advance one line below the current line and advance to the beginning of the line.• FF - (Form Feed) Advance to the next form.
Field Delimiter	Applies if the Delimited output type is selected. Options include Tab, Space, Other. If Other is selected, specify the field delimiter to use.

Destination Selection for a Text File

The Dest. Selection tab determines which records to transfer to the destination. VBScript can also be added to this specific destination from this tab. If implementing VBScript in all the destinations, do so in the **Job Scripts** tab. For more information, see Use VBScript (page [307](#)).

Steps

- 1 Click the **Dest Selection** tab.
- 2 Select one of the following options in the **Type of selection** section:
 - **Select All Records** - all records in the destination file are selected.
 - **Select First N records** - the first to the Nth records are selected, where N represents the total number of records to select. Indicate the number of records in the **Total** field.
 - **Range of records** - all records within the specified range are selected. Define the range in the **Start** and **End** fields.
 - **Every Nth record** - only each Nth record is selected, where N represents the multiple at which to select records. Define the Nth number in the **Nth** field and at which record to start the multiple count in the **Start At** field. For example, if the Nth number is 5 and the Start At number is 1, every record that is a multiple of 5 is selected. Therefore, records 5, 10, 15, and 20 are selected.
- 3 To add scripts to this specific destination, click **Expression**.
The **Expression Builder** window is displayed.
- 4 In the **Expression Builder** window, click **OK** when complete.
- 5 Click **Apply**.
- 6 Save the .XJB file.

SAP Setup and the HTTP Content Repository

Setting up the SAP destination in AnyDoc EXCHANGEit assumes that SAP and the Content Repository (if you are using one) are already set up and fully functional. The SAP administrator will need to setup the HTTP Content Repository before EXCHANGEit can be used to store invoice images in a repository.

These steps can be used as a guideline to set up your HTTP Content Repository but ultimately, the SAP administrator will need to either contact the third-party vendor of the repository for specific instructions or obtain documentation from the vendor for that purpose.

Destinations

Steps

- 1 Add the function module Z_SCMS_DOC_URL_GET.

The ABAP code for this function module can be found in Z_SCMS_DOC_URL_GET.TXT which is in the SAP subfolder of the EXCHANGEit program folder which is typically:

C:\Program Files\AnyDoc Software\EXCHANGEit 5.1\SAP

as of the 5.1 release but a different directory may be specified during installation.

This function module is the wrapper of the standard function module SCMS_DOC_URL_GET. This wrapper has the same functionality as the standard function module and it is designed to make it a remote-enabled function module. The function must be remote enabled and activated to work properly. The Imports, Exports and Exceptions are documented in the source file. All other files necessary to create SAP invoices and store documents in a Content Repository are installed and registered during the installation of EXCHANGEit.

- 2 Create the Content Repository ID.

The Content Repository should be ArchiveLink 4.5 or HTTP Content Server 4.5 certified by SAP to guarantee support of the necessary functionality.

The repository should be tested through OAC0. Double click the Content Repository ID to display the **Detail** window. The buttons to send a certificate and test the connection are beside the “CS Admin” button. Send a certificate once and then test the connection.

Display Content Repositories: Detail

Content Rep. ID: I2 Active 51 / 111
 Description: Test for Karl

Document Area: ArchiveLink
 Storage type: HTTP content server

Version no.: 0046 Content Server version 4.6
 HTTP server: EXCHANGEIT1.CORP.ANYDOC SOFTWARE.COM
 Port Number: 1090 SSL Port Number:
 HTTP Script: ContentServer/ContentServer.dll
 Transfer drctry:
 Phys. path: D:\usr\sap\TR1\SYSGlobal

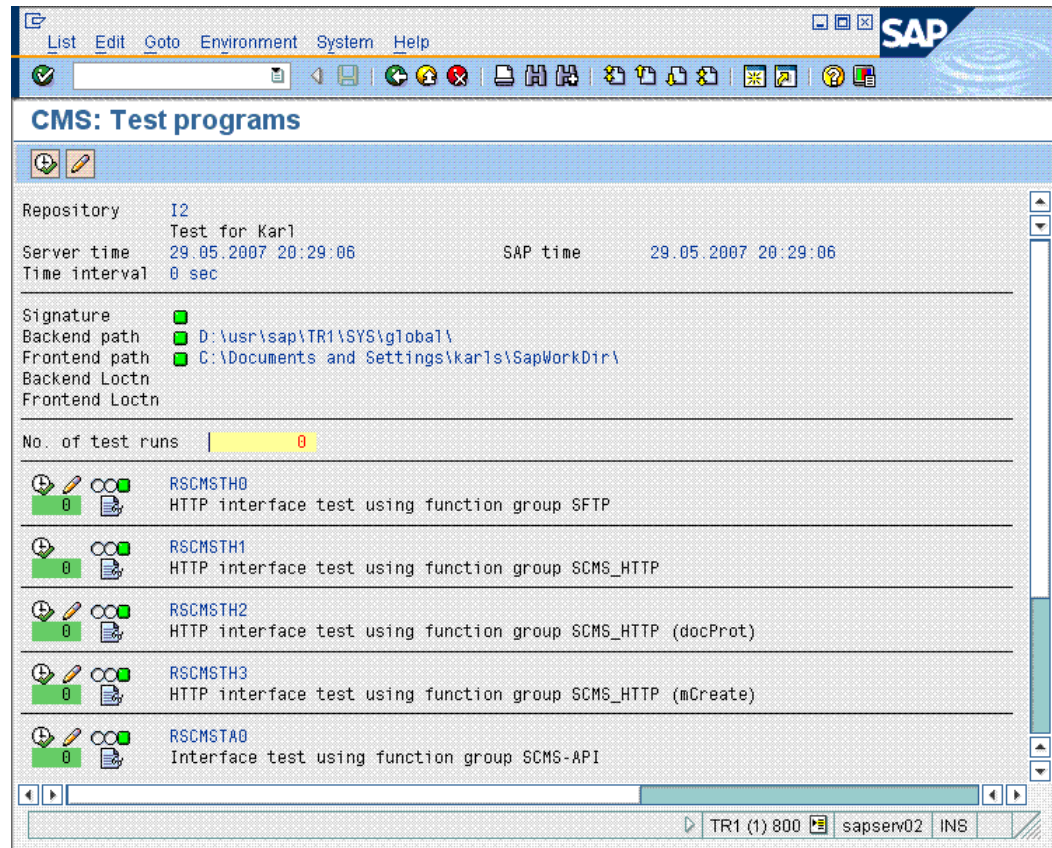
Time created: 04/24/07 16:21:53
 Created by: KSMART
 Name: KSMART

Last Changed At: 05/15/07 15:08:01
 Last changed by: KSMART
 Name: KSMART

TR1 (2) 800 sap serv02 INS

- 3 Test to see if the repository supports the needed functionality by using the program RSCMST via SE38 and do the following 5 tests:
 RSCMSTH0, RSCMSTH1, RSCMSTH2, RSCMSTH3 and RSCMSTA0.

Destinations



- 4 Create the Global Document Type and links between your repository and SAP objects (BKPF for FB60 invoices and BUS2081 for MIRO invoices). Transactions OAD5 and OAC2 may be useful for creating the document type and OAC3 for establishing links between your document type and SAP objects.

SAP as Destination

SAP is a software suite designed to handle comprehensive financial tasks for a business. Setting up a SAP system as a destination for jobs run through EXCHANGEit (i.e. invoice data, etc.) is addressed here.

Steps

- 1 Click the **Dest. Setup** tab.
- 2 Click **Configure Destination**. The **Select Destination Type** window is displayed.
- 3 Select **SAP** and click **Next**.

The **SAP Logon** window is displayed.

The screenshot shows the SAP Logon window with the following fields and values:

Field	Value
Client	800
System ID	TR1
User	sap_test
System Number	01
Password	xxxxxxxx
Application Server	sapserv02
Router String	
Gateway Server	

Buttons at the bottom: < Back, Next >, Cancel, Help.

- 4 Enter the following required information:
 - **Client**
 - **User**
 - **Password**
 - **System ID**
 - **System Number**
 - **Application Server**
- 5 If necessary, enter the following information:
 - **Router String**
 - **Gateway Server**
- 6 Click **Next**.

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The **Invoice Options** window is displayed.

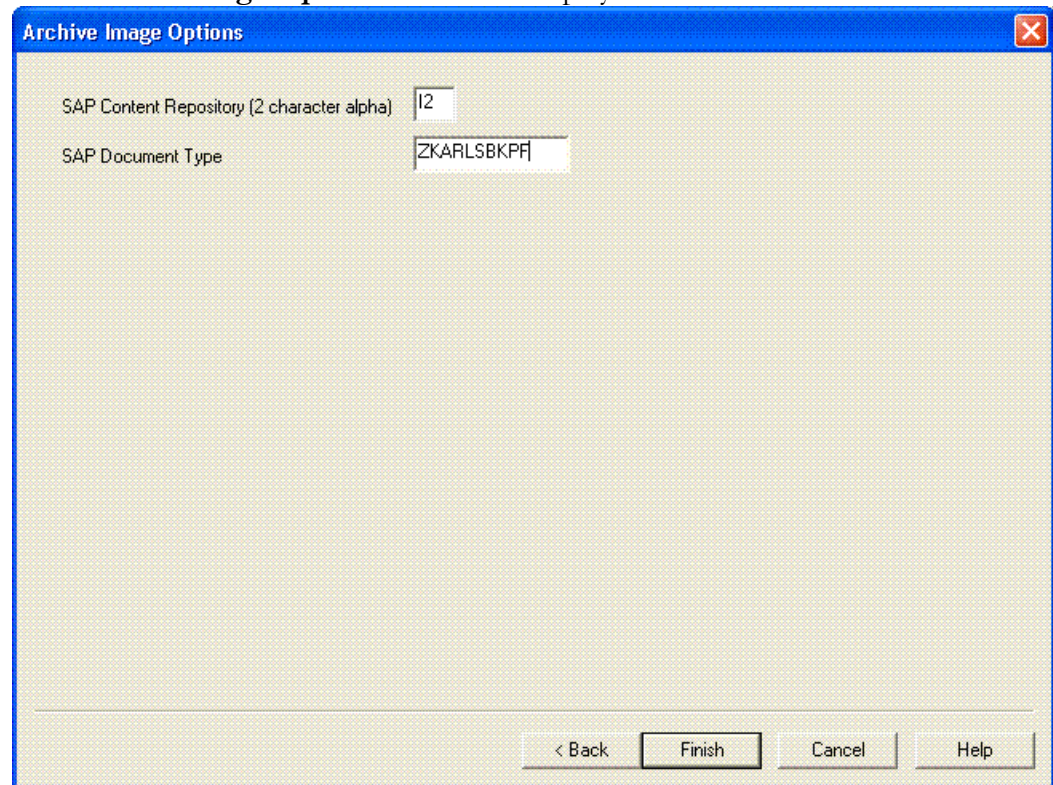
The screenshot shows the 'Invoice Options' dialog box. It has a blue title bar with the text 'Invoice Options' and a close button. The main area is light beige. It contains two sections: 'Invoice Type' with two radio buttons, 'AP Vendor (MIRO or FB60)' (selected) and 'AR Customer (FB70)'; and 'MIRO Action (with PO)' with two radio buttons, 'Park' and 'Post' (selected), and a checked checkbox 'Park if Post fails'. At the bottom right are four buttons: '< Back', 'Next >', 'Cancel', and 'Help'.

- 7 In the **Invoice Type** section, select one of the following options:
 - **AP Vendor (MIRO or FB60)**
 - **AR Customer (FB70)**
- 8 In the **MIRO Action (With PO)** section, select one of the following options:
 - **Park**

The invoice data will be held in SAP until ready for posting.
 - **Post**

The invoice data is posted to SAP. The **Park if Post** fails check box is selected by default. If selected and the data fails to post to SAP, then the invoice data is held in SAP for further review.
- 9 Click **Next**.

The **Archive Image Options** window is displayed.



- 10 If you plan on storing attachments with the invoice, specify the **SAP Content Repository** and **SAP Document Type**.

If an image path is included with your invoice data, EXCHANGEit will attempt to store the image and link it to the invoice. If the image is missing, this will be treated as an error and the invoice will not be created. If multiple image paths are specified (OCR attachments), then each one will be added as a separate attachment to the invoice.

- 11 Click **Finish**.

The **Dest. Setup** tab is displayed.

SAP Destination Mapping

For both MIRO (with PO) and FB60 (no PO) invoices, there are 4 specific fields that must be mapped: Invoice Date, Posting Date, Company Code and Item-Amount.

There are also fields required for each specific type of invoice.

Required fields for MIRO: Item-Purchase Order, Amount, Item and Item-Quantity. Amount is the total invoice amount and Item is the SAP item number.

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Required fields for FB60: Vendor Name, Vendor City, G/L Account and Cost Center.

Required fields for one time vendors: Vendor Name and Vendor City.

Steps

- 1 Click the **Dest. Mappings** tab.
- 2 Map the **Source Fields** in the left pane to the appropriate destination or **Target Fields** in the right pane by dragging and dropping each source field into the associated target field.
OR
Click **Automap** to have EXCHANGEit automatically map fields. Source field are mapped to target fields that have similar names.
- 3 If any changes occurred in the source or destination, click **Refresh Fields** to update the Dest. Mappings tab.
The **Refresh Selection** window is displayed.
- 4 Select all applicable options and click **OK**:
 - Select the **Source Fields** check box if the source has changed.
The **Source Fields** grid is refreshed.
 - Select the **Destination Fields** check box if the destination has changed.
 - The **Target Fields** grid is refreshed.
- 5 To unmap a source and target field, select the target field and click **Unmap**.
- 6 To unmap all target fields, click **Unmap All**.
- 7 To view a report of the current mappings, click **Report** and select where the report should be displayed. Options include:
 - **Screen**
The report is displayed on the screen in the **Report** window. Click **Close**.
 - **File**
Specify the name and location to save the report and click **Save**. The file is saved as a .TXT file.
 - **Printer**
Specify the print options and click **OK**.The report displays all of the information within the target field grid, such as the source field mapped to the target field, type and length. Use the report to identify problems occurring in the destination and to view the results of the source-to-target field mappings.

Park Invoice and Payment Block Fields

SAP Destination Mapping has two fields, Park Invoice and Payment Block, that have unique characteristics.

	Target Fields	Source Field	Type	Length	Truncated
21	Item-Booking OK		Boo...	1	
22	Item-Order Unit		Inte...	10	
23	Item-PO Text		Char	40	
24	Item-Purchase Order	afdemoPO_Number	Char	16	
25	Item-Quantity		Inte...	12	
26	Item-Tax Code		Char	2	
27	Item-Tax Jurisdiction		Char	15	
28	Item-Text		Char	50	
29	Net Terms		Inte...	3	
30	Park Invoice	afdemo.PARK_IT	Char	5	
31	Payment Block	afdemo.PAYMENT_BLOCK	Char	1	
32	Payment Terms		Char	4	
33	Posting Date		Date	10	
34	Reference		Char	16	
35	Tax Amount		Cur...	12	
36	Text		Char	40	

If you map "I", "Y", "1", or "X" to the Park Invoice field, then the invoice will be parked; any other value results in a post being attempted.

If the value is blank or the field is not mapped, then the default action will be the setting you define on the Destination Options tab.

If Payment Block is mapped, then the value will be set on the invoice. SAP defines the following payment block keys:

- <blank> Free for payment
- * Skip account
- A Blocked for payment
- B Blocked for payment
- N IP post processing
- P Payment request
- R Invoice verification
- V Payment clearing

Destinations

Any non-blank value will result in the payment being blocked but a reason (key) may not be defined.

Destination Options for SAP

Most of the values specified in the Destination Setup wizard can be changed on the Dest. Options tab. Some fields might be displayed on this tab for informational purposes only and cannot be changed without deleting the destination and recreating it.

Option	Description
Client	The number that corresponds to your SAP system.
User	User ID used to log into SAP.
Password	Password used to log into SAP.
System ID	The three-character name that identifies a SAP System.
System Number	
Application Server	
Content Repository	The specific storage media within the SAP system.
Document Type	The classification for documents that are stored in the specified SAP system.
One Time Vendor/Customer	The term for a collective customer or vendor master record that is used for processing transactions with customers or vendors with whom you do not regularly do business with.
Error Threshold	Enter the number of errors that can occur while processing a job. When this limit is reached the job is stopped.

Optional For SAP Routers

Option	Description
Router String	A description of the steps in a desired connection between two servers.
Gateway Server	Server on which the SAP gateway is running.

Invoice Type

Option	Description
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Option	Description
AP Vendor (MIRO/FB60)	The company or individual to whom amounts are payable for goods delivered or services performed.
AR Customer (FB70)	The company or individual from whom money is due.

MIRO Action (has PO)

Option	Description
Park	You park a document if you want someone to check the budgeting and post it a later time. Only then can the document be completely saved. You can change, delete, save as complete, or post parked documents.
Post	Creates a document and saves the data in the database. Before saving the data, the SAP System performs consistency checks.
Park if Post Fails	If an error occurs when posting, the document is parked for review.

Destination Selection for SAP

The Dest. Selection tab determines which records to transfer to the destination. VBScript can also be added to this specific destination from this tab. If implementing VBScript in all the destinations, do so in the **Job Scripts** tab. For more information, see Use VBScript (page [307](#)).

Steps

- 1 Click the **Dest Selection** tab.
- 2 Select one of the following options in the **Type of selection** section:
 - **Select All Records** - all records in the destination file are selected.
 - **Select First N records** - the first to the Nth records are selected, where N represents the total number of records to select. Indicate the number of records in the **Total** field.
 - **Range of records** - all records within the specified range are selected. Define the range in the **Start** and **End** fields.
 - **Every Nth record** - only each Nth record is selected, where N represents the multiple at which to select records. Define the Nth number in the **Nth** field and at which record to start the multiple count in the **Start At** field. For example, if

Destinations

the Nth number is 5 and the Start At number is 1, every record that is a multiple of 5 is selected. Therefore, records 5, 10, 15, and 20 are selected.

- 3 To add scripts to this specific destination, click **Expression**.
The **Expression Builder** window is displayed.
- 4 In the **Expression Builder** window, click **OK** when complete.
- 5 Click **Apply**.
- 6 Save the .XJB file.

Chapter 6

Links and New Fields

After you have mastered moving data from a source to a destination, you are ready to incorporate some of EXCHANGEit's advanced features into your projects, such as:

- Moving data from multiple sources by adding a link
- Adding a new field
- Creating tables

For simple jobs, information is moved from one source to one destination. For jobs that are more complicated, information may be moved from multiple sources into a destination. EXCHANGEit enables you to do this by adding a link or new field.

Links

A link allows access to another source of data. Identify the following information before configuring the link or field:

- Configured primary source
- File name and Extension, if applicable
- Location of the link information
- Common fields between the source and link
- Key Fields

Fields

A new field performs a variety of operations. For example, a new field may do the following:

- Function as a qualifier
- Hold data
- Create a concatenation with information from several other fields using VBScript
- Act as a key field to link to another database

Links and New Fields

When using VBScript, creating a new field is often necessary to create information that is either not present in the source or not present in the format in which it is needed. For example, using VBScript, this new field can contain a concatenation of data to add the current system date to the output or to parse many fields from one field. See Use VBScript (page [307](#)).

Tables

EXCHANGEit accepts any tables created in an ODBC-compliant database application. Creating a new table is a convenient alternative to jumping between applications when creating new tables. For example, use the Create New Table option to transfer information from a .GTO source file to a different table configuration. Before creating a new table, a source must be configured.

Link/New Field Tabs

Similar to setting up a source, links and new fields are configured in five steps. The steps correlate with each Link/New Field tab and must be completed in the order from left to right, as follows:

- 1 **Link/New Field Desc.** - Name of the link/new field and any comments regarding the specific project. The link/new field description displays on the link node.
- 2 **Link/New Field Setup** - If the node is a link, this tab folder indicates the database type, location and table that is linked. If the node is a new field, the tab folder indicates the field name.
- 3 **Link/New Field Mappings** - Displays the available fields that can be linked to the destination or provides the blank rows in which to add the new field. A **View Link** button is provided to view the linked data.
- 4 **Link/New Field Options** - This tab folder displays optional settings for links.
- 5 **Link Selections** - Indicates which records to transfer from the source. The Expression Builder is accessed from this tab folder to add VBScript to the project. See Using VBScript for other ways to access the Expression Builder.

- 6 **Job Scripts** - Where the VBScript being run on the link is entered, if applicable. The Expressions Builder is accessed from this tab folder to add VBScript to the project. For more information, see Use VBScript (page [307](#)).

The screenshot shows a tabbed interface with the following tabs: Link/New Field Desc., Link/New Field Setup, Link/New Field Mappings, Link/New Field Options, Link Selections, and Job Scripts. The 'Link/New Field Desc.' tab is active. It contains a 'Description' text box with the text 'Link to new table' and an 'Apply' button to its right. Below the description is a 'Comments' text box with the text 'Link to Contacts table' and a vertical scrollbar on its right side.

Add a Link

Steps

- 1 Select the node in the flowchart for which to add the link.
- 2 Right-click and select **Add Link\New Field**.
The **Add new link\field** window is displayed.

The screenshot shows a dialog box titled 'Add new link\field'. It has a blue title bar with a close button (X) on the right. The main area contains a 'Description:' label followed by an empty text input field. At the bottom of the dialog are three buttons: 'OK', 'Cancel', and 'Help'.

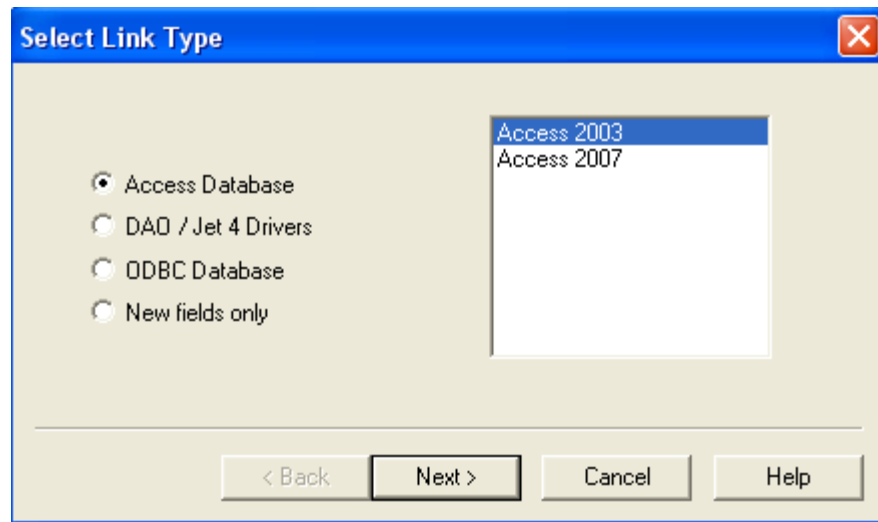
- 3 Enter the link name in the **Description** field and click **OK**.
The name of the link appears in a new node between the Source and Destination nodes in the left pane of the screen.

Configure the Link

Steps

- 1 Click the **Link/New Field Setup** tab.
- 2 Click **Configure Link**.

The **Select Link Type** window is displayed.



3 Select one of the following options and click **Next**:

- **Access Database (.MDB)**

Transfer information from an Access database table.

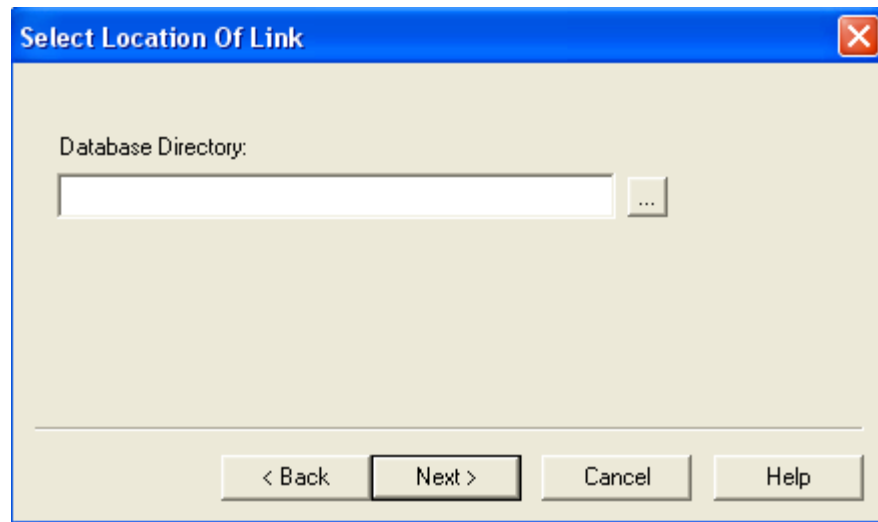
- **DAO Database**


Transfer information from Btrieve®, dBase®, FoxPro® and Paradox® databases. DAO databases are accessed by a Microsoft® Jet® database engine.

- **ODBC Database**

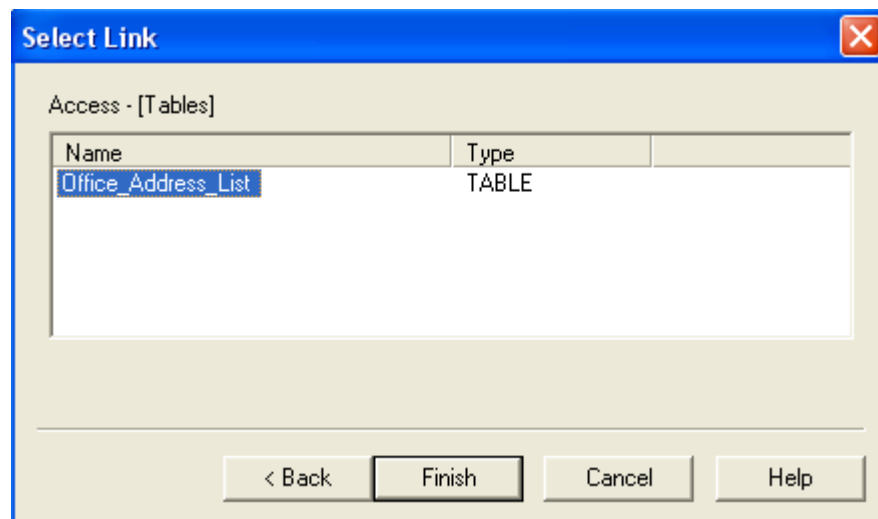
Transfer information from Oracle®, SQL Server®, Sybase® and Visual FoxPro® databases, among others.

The **Select Location of Link** window is displayed.



- 4 Click the **Browse** button, , and map to the location of the ODBC-compliant database table.
- 5 Click **Next**.

The **Select Link** window is displayed.



- 6 Select the table and click **Finish**.

Links and New Fields

The **Link/New Field Setup** tab is displayed.

Link/New Field Desc.	Link/New Field Setup	Link/New Field Mappings	Link/New Field Options	Link Selections
<div>C:\Program Files\AnyDoc Software\EXCHANGEit 4.0\aiim.mdb</div> <div>AIIM Info</div> <div>Microsoft Access Table</div>				

Map a Link

The link is the only option that allows a single source to produce more than one output record. Link mapping, unlike source-to-destination mapping, requires mapping the link's key fields. Do not map fields other than those used to retrieve records.

Steps

- 1 Click the **Link/New Field Mappings** tab. Source fields display in the left pane. Fields that can be linked display in the right pane. Fields on this screen include the following:
 - **Available Fields**
Displays the new field names
 - **Mapped Field**
Displays the name of the field mapped to the new field (not used in this option)
 - **Field Type**
Displays the type of field. For example, character, number, date, or currency.
 - **Length**
Displays the number of characters parameter
 - **Scale**
Displays the number of digits to the right of the decimal point
 - **Default Value**
Not available at this time
 - **Image**

Indicates the field that contains the image path.

Only one field can be identified as an image path. Additionally, the image path must be valid to transfer the image.

- Click **View Link** to check if information is present and correct in the linked table. A list of records appears below the Link/New Field Mappings tab.

Link/New Field Desc.	Link/New Field Setup	Link/New Field Mappings	Link/New Field Options	Link Selections
Available Fields		Available Fields	Mapped Fi	Script Expr
B_NBR_OF_DOCS		1	AIIM Info.rec no	Integer
VERSION		2	AIIM Info.lname	Char
1999aim.FName		3	AIIM Info.fname	Char
1999aim.MI		4	AIIM Info.comp...	Char
1999aim.LName		5	AIIM Info.busi...	Char
1999aim.Company		6	AIIM Info.addr...	Char
1999aim.Address_A1		7	AIIM Info.city	Char
1999aim.City_AC		8	AIIM Info.state	Char
1999aim.State_AS		9	AIIM Info.zip	Char
1999aim.Zip_AZ		10	AIIM Info.coun...	Char
1999aim.Phone				
1999aim.Province				
1999aim.Country				
1999aim.PostalCode				
<div>View Link Refresh Fields Unmap</div>				

AIIM Info.rec no	AIIM Info.lname	AIIM Info.fname	AIIM Info.company name	AIIM Info.business type	AIIM Info.address	AIIM
22	JONES	LISA	NEVADA IMAGING SOLUTIONS	--	4227 BURNHAM AVE	LAS
23	CLINTON	WILLIAM	FEDERAL GOVERNMENT	--	1600 PENNSYLVANIA AVE NW	WAS
24	GATES	WILLIAM	MICROSOFT	--	ONE MICROSOFT WAY	RED
25	JAMES	JESSE	WELLS FARGO	--	36711 JEFFERSON AVE	DAD
26	GREAVES	MERIT	MTI	--	3217 W 0815PO ST	TAM

- Click the **Refresh Fields** button to update the fields in the linked table. Use this option to update the data or the table structure in the linked table after the link has been configured.
- Click a common source field from the left pane and drag to the mapped field on the right pane. The pointer changes to a red arrow when dragging source fields and green arrow when moving to the mapped fields.


Link/New Field Desc.	Link/New Field Setup	Link/New Field Mappings	Link/New Field Options	Link : < >
Available Fields		Available Fields	Mapped Field	Script Expression
Contacts.ContactID		1	Contacts.Conta...	Contacts.Contact...
Contacts.FirstName		2	Contacts.FirstN...	Contacts.FirstName
Contacts.LastName		3	Contacts.LastN...	Contacts.LastName
Contacts.Address		4	Contacts.Addre...	
Contacts.City		5	Contacts.City	
Contacts.StateOrProvince		6	Contacts.StateO...	
Contacts.PostalCode		7	Contacts.Postal...	
Contacts.WorkPhone		8	Contacts.Work...	
Contacts.FaxNumber		9	Contacts.FaxNu...	
		10		
<div>View Link Refresh Fields Unmap</div>				

Unmap a Link


Steps

- 1 Click the **Link/New Field Mappings** tab.
- 2 Select the appropriate row by clicking the row number in the right pane.
- 3 Click **Unmap**.


Link Options for an Access Database

Option	Description
DB Path	Displays the database being linked to. To change the database, click Change and select another database. The new database must contain the same tables as the previous database. If the database contains the same fields, the mappings are retained.
Delete Record After Destination Is Updated	Select this check box to delete the source file after the job is processed. <div> The record is permanently deleted and cannot be retrieved.</div>
Pass source data through if no link record found	Select this check box to process the record, using only the source data, even if no data is available in the link.

Link Options for a DAO Database/Jet 4 Driver

Option	Description
Delete Record After Destination Is Updated	Select this check box to delete the source file after the job is processed. <div> The record is permanently deleted and cannot be retrieved.</div>
Pass source data through if no link record found	Select this check box to process the record, using only the source data, even if no data is available in the link.

Link Options for an ODBC Database

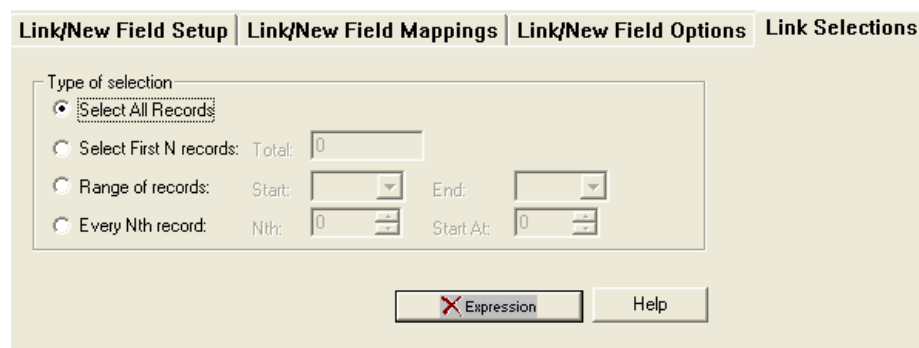
Option	Description
DSN	Displays the database being linked to. To change the database, click Change and select another database. The new database must contain the same tables as the previous database. If the database contains the same fields, the mappings are retained.
User ID	The User ID used to log into the database.
No Password	Select this check box if a password is not required.
Password	The password used to log into the database.
Delete Record After Destination Is Updated	Select this check box to delete the source file after the job is processed.  The record is permanently deleted and cannot be retrieved.
Pass source data through if no link record found	Select this check box to process the record, using only the source data, even if no data is available in the link.

Select the Linked Records

Use the Link Selections tab to configure filters to define which records to move from the source to the destination.

Steps

- 1 Click the **Link Selections** tab.



- 2 Select one of the following options in the **Type of selection** section:

Links and New Fields

- **Select All Records** - all records in the source file are selected.
 - **Select First N records** - the first to the Nth record is selected, where N represents the total number of records to select. Indicate the number of records in the **Total** field.
 - **Range of records** - all records within the specified range are selected. Define the range in the **Start** and **End** fields.
 - **Every Nth record** - only the Nth record is selected, where N represents the multiple at which to select records. Define the Nth number in the **Nth** field and at which record to start the multiple count in the **Start At** field. For example, if the Nth number is 5 and the Start At number is 1, every record that is a multiple of 5 is selected.
- 3 To add scripts to this specific link, click **Expression**.
The **Expression Builder** window is displayed.
 - 4 In the **Expression Builder** window, click **OK** when complete. For more information, see Use the Expression Builder (page [314](#)).

Add a New Field

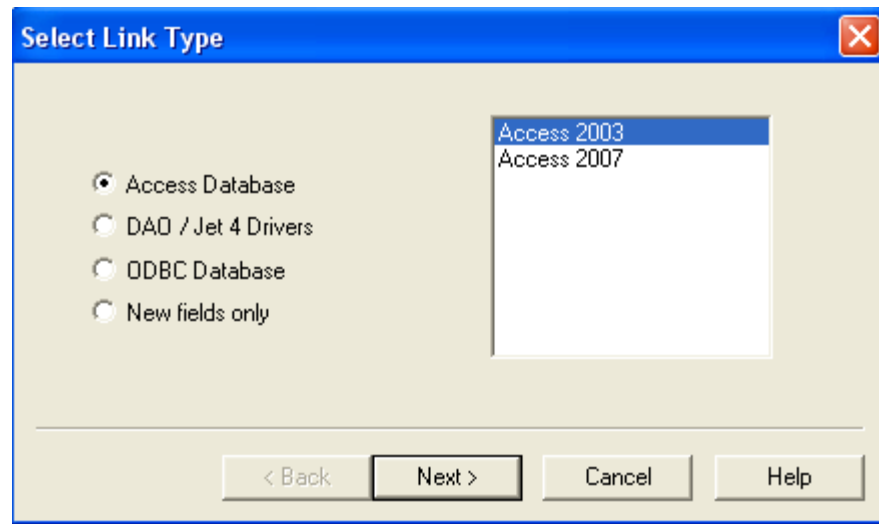
Steps

- 1 Select the node in the flowchart for which to add the field.
- 2 Right-click and select **Add Link\New Field**. The Add new link\field window is displayed.



- 3 Enter the field name in the **Description** field and click **OK**. The name of the field appears in a new node between the Source and Destination nodes in the left pane of the screen.
- 4 Click the **Link/New Field Setup** tab.
- 5 Click **Configure Link**.

The **Select Link Type** window is displayed.



- 6 Select **New fields only** and click **Next**.

The **Link/New Field Setup** tab is displayed.

- 7 Click the **Link/New Field Mappings** tab. Source fields display in the left pane. Fields that can be linked display in the right pane. Fields on this screen include the following:

- **Available Fields**
Displays the new field names
- **Mapped Field**
Displays the name of the field mapped to the new field (not used in this option)
- **Field Type**
Displays the type of field. For example, character, number, date, or currency.
- **Length**
Displays the number of characters parameter
- **Scale**
Displays the number of digits to the right of the decimal point
- **Default Value**
Not available at this time
- **Image**
Indicates the field that contains the image path.

Links and New Fields

Only one field can be identified as an image path. Additionally, the image path must be valid to transfer the image.

Chapter 7

Transferring Information

Information is ready to be transferred after both the source and destination are setup. The transfer can occur immediately or on a schedule.

Tasks can be run immediately from within EXCHANGEit. For more information, see [Run a Task](#). (page [274](#))

Scheduling is setup in the EXCHANGEit Windows Scheduler (EWS) which can be configured to process jobs hourly, daily, weekly, monthly, yearly or once. For more information, see [EWS \(EXCHANGEit Windows Scheduler\)](#) (page [275](#))

Create and Schedule Tasks

Tasks must be created and then scheduled to run.

Steps

- 1 Open the **EXCHANGEit 13.4 EWS Client** window.
 - Click **Start | All Programs | AnyDoc Software Suite | EXCHANGEit 13.4 | EWS Client**
 - From within EXCHANGEit, click **Scheduler | Job Scheduler**.
- 2 From the **File** menu, click **New**.
The **Task and Schedule Properties** window is displayed.
- 3 Complete the properties on each of the following tabs:
 - Task (page [271](#))
 - Schedule (page [272](#))
 - Security (page [273](#))
- 4 Click **OK**.

Setting General Task Properties

The **Task and Schedule Properties | Task** tab includes general information about the task and specifies the jobs that are included in the scheduled task.

Transferring Information

Interdependent tasks can also be created on this tab. Interdependent tasks are a series of tasks that depend on the outcome of a previous job. Indicating that jobs are interdependent ensures that errors encountered in one job do not effect dependant jobs.

If an error occurs in a job, the processing of all interdependent jobs is suspended. For example, the source of Task B is configured from the destination of Task A. If Task A fails to run, Task B is suspended because it depends on receiving information from the Task A destination. Restart suspended jobs after the error is fixed.

Steps

- 1 In the **Task Name** field, enter a name for the scheduled task.
- 2 In the **Job List field**, enter the job to include in the task.
OR
To select multiple jobs, display a list of the available jobs:
 - a) Click **Edit**.
 - b) The EXCHANGEit **Task Selector** window is displayed.
 - c) Select the .xjb files you want to include in the task and click the right arrow to move them to the right pane.
 - d) The projects displayed are those contained in the directory specified under **Preferences | Directories | Job File Directory**.
 - e) If the project you want to run is not displayed, edit the Job File Directory location in EXCHANGEit or copy the .xjb file into the specified Job File Directory. The **Actual Project Path** field displays the location of the job file. This field is read-only.
 - f) Click **OK**.
- 3 To allow this task to be run, select the **Enable** check box.
- 4 To make multiple selected jobs interdependent, select the **Jobs are Interdependent** check box.
- 5 If applicable, enter **Comments** associated with the task.

Setting Task Scheduling Properties

The **Task and Schedule Properties | Schedule** tab includes information about when the task should start running and how often it is run. All of the scheduling intervals, except Hourly, provide the additional option to repeat the task for a specific amount of time. When an applicable interval is selected, the **Advanced** button is available.

Steps

- 1 In the **Schedule Task** field, select the interval to run the task. Tasks can be

scheduled to run:

- **Hourly**
 - **Daily**
 - **Weekly**
 - **Monthly**
 - **Yearly**
 - **Once**
- 2 In the **Start Time** field, enter the time the job should be run at the scheduled interval.
 - 3 Set the scheduling options that correspond to the selected interval.
For example:
 - If you selected **Hourly**, select the specific hours the task should be run.
 - If you selected **Monthly**, select the months and the day of the month the task should be run.
 - If you selected **Once**, select the date the task should be run or click the **Create Job and Run Immediately** check box.
 - 4 To repeat the task, do the following:
 - a) Click **Advanced**.
The **Repetition Schedule** window is displayed.
 - b) Click the **Repeat Task** check box.
 - c) In the **Repeat** section, specify the number of minutes or hours between each scheduled run and the number of minutes or hours the task should continue to repeat.
 - d) Click **OK**.

Setting Task Security Properties

The **Task and Schedule Properties | Security** tab includes information about the user who is responsible for running this task.

Steps

- 1 In the **Domain** field, enter the domain the user belongs to.


Transferring Information

- 2 In the **User** field, enter the user name that will be associated with this task when it is run.
- 3 In the **Password** field, enter the password for the specified user.

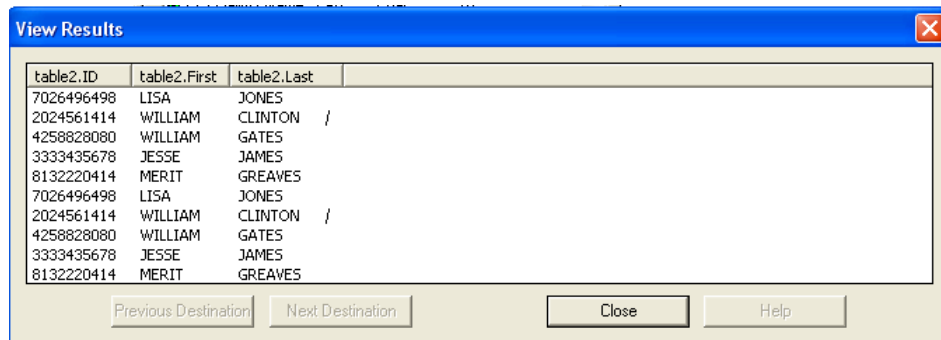
Run a Job


Moving data from a source to a destination is EXCHANGEit's main function. However, before you do this, you should always test the operation first to make sure everything is configured correctly. By running a test, you are given the opportunity to check all the information to ensure that it is correct.


Steps

- 1 Configure a source and destination and click the yellow **Test** button, , to verify configuration.

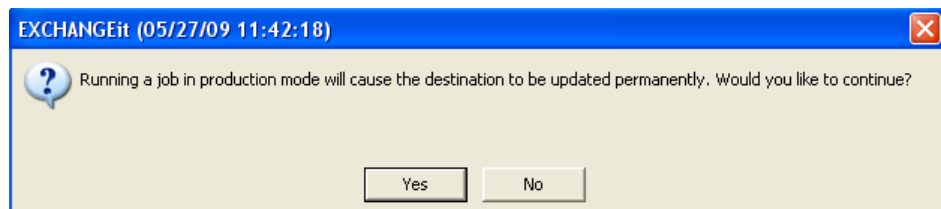
The **View Results** window displays the contents of the source files to be sent to the destination.



 If no data appears in the View Results window, then click View Source on the Source Mappings tab and review the source and mappings.

- 2 Click **Close**.
- 3 Click the green **Run** button, .

A warning message appears asking if you would like to continue. This message provides a last chance to correct anything before the transfer is committed.





If the run job transfer fails while the test worked, the problem could be the destination. Check your destination configurations for accuracy and browse the History Database to assist in determining the cause of the problem. See [Handle Record Errors](#) (page [297](#)).

- 4 Click **Yes** to run the task.
The **View Results** window is displayed, showing what actions were taken during the transfer. See [Handle Record Errors](#) (page [297](#)).
- 5 Click **Close**.
- 6 Select **File | Save As**, name the file, and click **Save** to save your file.

Delete a Scheduled Task

Steps

- 1 Open the **EXCHANGEit 13.4 EWS Client** window.
 - Click **Start | All Programs | AnyDoc Software Suite | EXCHANGEit 13.4 | EWS Client**
 - From within EXCHANGEit, click **Scheduler | Job Scheduler**.
- 2 From the **Edit** menu, click **Delete**.
The task is removed from the **EXCHANGEit 13.4 EWS Client** window.

EXCHANGEit Windows Scheduler (EWS)

After you create a task by linking source information with a destination, EWS can be setup to schedule the transfer of information. EWS transfers the source data to the destination on a specific schedule. A task is a scheduled set of one or more projects, where a "project" is the source/destination combination and its configuration stored in an .XJB file.

A source and destination must be configured before using the EWS. For more information about creating projects, see [Sources](#) (page [25](#)) and [Destinations](#) (page [97](#)).

Import Classic Scheduler Tasks

When the Classic EXCHANGEit Scheduler schedules a job it stores the job information in a Ixchange.scx file in the Job File Directory. The date, time, frequency, and job file names are stored in that file.

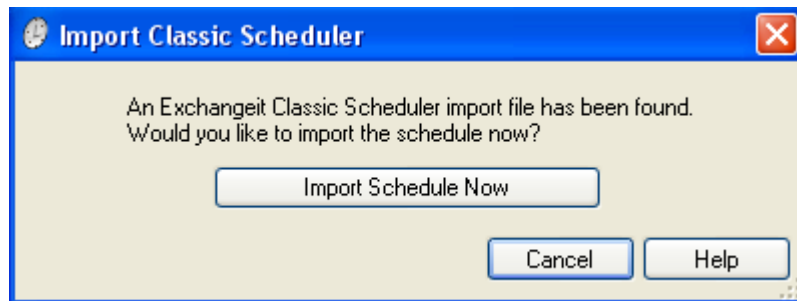
If the List Refresh Rate on the EWS Settings window is set to a number higher than zero and an Ixchange.scx file is found, then the EWS client automatically displays a message advising the import file was found. The message asks if the schedule should be imported to the EWS scheduler. If the Refresh Rate is set to zero, it must be done manually.

After the Ixchange.scx file is imported, each entry in the old scheduler is converted to an equivalent entry in the new schedule. Then the Ixchange.scx file is renamed Ixchange.scl for a backup

Steps

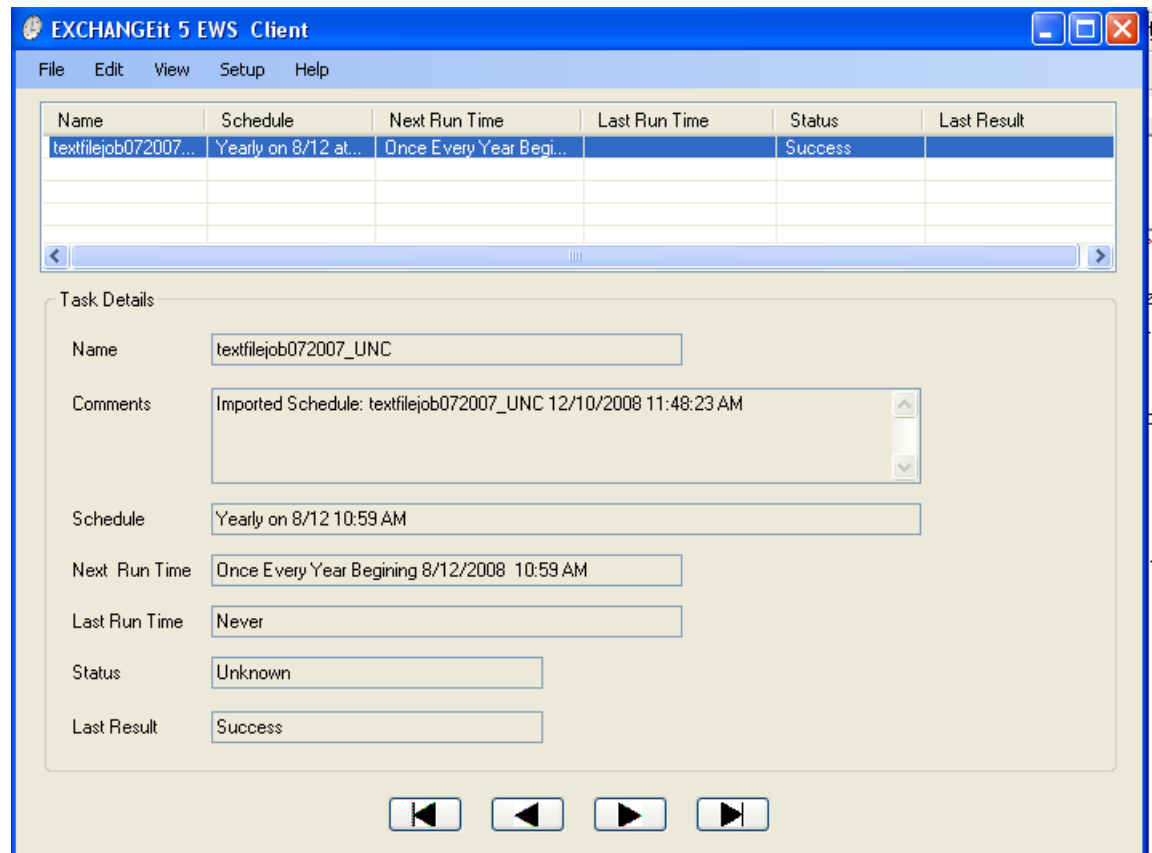
- 1 From the **Setup** menu, click **Import Scheduler File**.

A message is displayed advising the import file was found and asking if the schedule should be imported to the EWS scheduler.



- 2 Click **Import Schedule Now**.

The task is displayed on the **EXCHANGEit 13.4 EWS Client** window with a **Status** of **Success**.



EWS Components

The EWS consists of three components:

- The EWS Client
- The EWS Launcher
- The EWS Service

EXCHANGEit EWS Client

The EXCHANGEit 13.4 EWS Client window displays the scheduled tasks and is an editor for the EXCHANGEit task objects. The task objects contain all the information needed to run an EXCHANGEit job, including the calendar, the job file names, and parameters. To display the details associated with each task, select that row in the table. It will highlight in blue and the details are displayed in the fields below the table.

The screenshot shows the EXCHANGEit 5 EWS Client window. At the top is a menu bar with File, Edit, View, Setup, and Help. Below the menu is a table with the following columns: Name, Schedule, Next Run Time, Last Run Time, Status, and Last Result. The first row is highlighted in blue and contains the text: textfilejob072007..., Yearly on 8/12 at..., Once Every Year Begi..., (empty), Success, and (empty). Below the table is a section titled 'Task Details' which contains several input fields: Name (textfilejob072007_UNC), Comments (Imported Schedule: textfilejob072007_UNC 12/10/2008 11:48:23 AM), Schedule (Yearly on 8/12 10:59 AM), Next Run Time (Once Every Year Beginning 8/12/2008 10:59 AM), Last Run Time (Never), Status (Unknown), and Last Result (Success). At the bottom of the window are four navigation buttons: a double left arrow, a single left arrow, a single right arrow, and a double right arrow.

Name	Schedule	Next Run Time	Last Run Time	Status	Last Result
textfilejob072007...	Yearly on 8/12 at...	Once Every Year Begi...		Success	

Task Details

Name: textfilejob072007_UNC

Comments: Imported Schedule: textfilejob072007_UNC 12/10/2008 11:48:23 AM

Schedule: Yearly on 8/12 10:59 AM

Next Run Time: Once Every Year Beginning 8/12/2008 10:59 AM

Last Run Time: Never

Status: Unknown

Last Result: Success

EWS Launcher and Service

When an EXCHANGEit task is created, it is monitored until the scheduled time arrives. The task runs the EWS Launcher which has the EXCHANGEit job parameters embedded. The EWS Launcher connects via a port on the system to the EWS Service, which is listening on a corresponding port for service requests.

Once a connection is made between the EWS Launcher and the EWS Service, the job parameters are handed off to the service and the EWS Launcher terminates. The EWS Service queues up the job(s) and sequentially runs them using EXCHANGEit's Run (COM) interface.

The status of the EXCHANGEit jobs is monitored by private event logs, one each for the client, the launcher, and the service. In addition, normal status is maintained by EXCHANGEit in the history database and the exception handler. When problems are encountered using the EWS Scheduler to run EXCHANGEit jobs, use the private EWS and the built-in EXCHANGEit tools, the history database, and the exception handler to troubleshoot the problem.

Any EXCHANGEit job designed to be used by the EWS Scheduler must first be fully debugged and working. This means input and output must be verified and VBScripts must be tested and debugged.

Configure EWS .ini File Settings

The EWS .ini file settings must be configured to facilitate the communication between the EXCHANGEit Scheduler Service and EXCHANGEit as well as avoid conflicts between EWS and other active services.

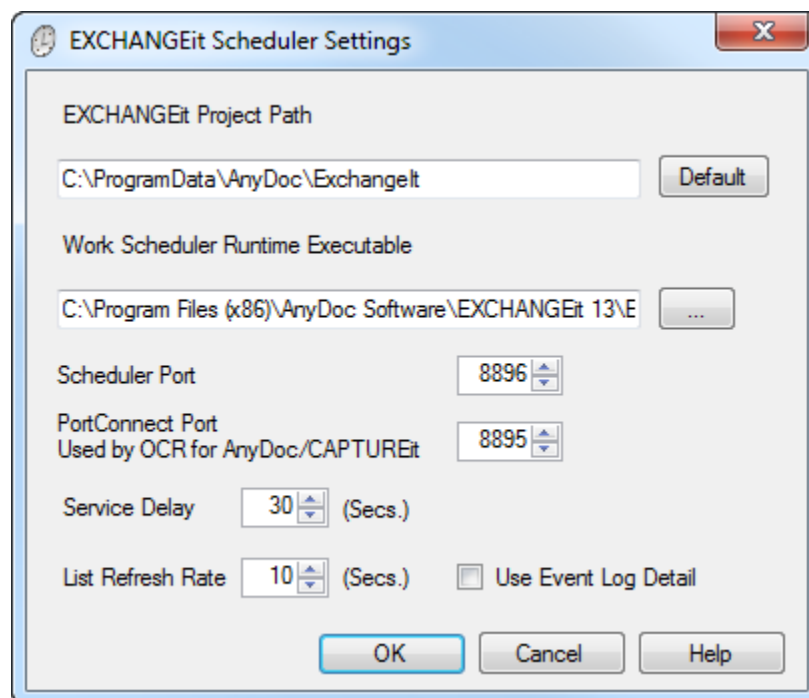
The EWS .ini file settings can be configured in EXCHANGEit or in the EWS Client. The available settings in each location vary. If a common setting is changed in one location it will be applied to both locations.

Configure EWS .ini File Settings in EWS Client

The EWS .ini file settings include additional settings that are specific to EWS. These settings specify the location of EXCHANGEit so the EWS service can communicate with EXCHANGEit.

Steps


- 1 Click **Start** | **All Programs** | **AnyDoc Software Suite** | **EXCHANGEit 13.4** | **EWS Client**.
- 2 From the **Setup** menu, click **Settings**.



- 3 In the **EXCHANGEit Project Path** field, enter the location of the EXCHANGEit project files.

To enter the default EXCHANGEit project file location, click **Default**. The default location is the Job File directory that is set up in EXCHANGEit.

- 4 In the **Work Scheduler Runtime Executable** field, if the default location of the ExchangeitLauncherDN.exe file is not correct, enter the correct location.
- 5 In the **Scheduler Port** field, enter the port number that should be used.
If the default system port is used by another application, change this to a value between 5001 and 9999. This number is stored in the registry and is used by both RunTime Executable launcher program and the EWS service module.
- 6 In the **PortConnect Port** field, enter the port number that should be used.
If the default system port is used by another application, change this to a value between 5001 and 9999. This is the port number that CAPTUREit, OCR for AnyDoc, and EXCHANGEit use to communicate with each other. This number must be different from the Scheduler Port number.
- 7 In the **Service Delay** field, enter the amount of time EWS pauses before accepting connections.
This specifies the amount of time that the EWS service has to start. Values are 1 to 100 seconds and the default is 30 seconds. If your computer experiences periods of slow response rates, then increase the Service Delay time.
- 8 In the **List Refresh Rate** field, enter the number of seconds between automatic refreshes of the task list.

 To achieve minimal display flickering, a value equal to or greater than 10 is recommended. The maximum number of seconds allowed is 60.
- 9 To include more detailed information about jobs when using EWS as a service, select the **Use Event Log Detail** check box.
- 10 Click **OK**.

Configure EWS .ini File Settings in EXCHANGEit

The EWS .ini file settings include additional settings that are specific to EWS. These settings specify the location of EXCHANGEit so the EWS service can communicate with EXCHANGEit. These settings can be modified within EXCHANGEit.

Steps

- 1 Open EXCHANGEit.
- 2 From the **Preferences** menu, click **Scheduler Settings**.
- 3 In the **Scheduler Port** field, enter the port number that should be used.

Transferring Information

If the default system port is used by another application, change this to a value between 5001 and 9999. This number is stored in the registry and is used by both RunTime Executable launcher program and the EWS service module.

- 4 In the **PortConnect Port** field, enter the port number that should be used.
If the default system port is used by another application, change this to a value between 5001 and 9999. This is the port number that CAPTUREit, OCR for AnyDoc, and EXCHANGEit use to communicate with each other. This number must be different from the Scheduler Port number.
- 5 In the **Service Delay** field, enter the amount of time EWS pauses before starting.
This specifies the amount of time that the EWS service has to start. Values are 1 to 100 seconds and the default is 30 seconds. If your computer experiences periods of slow response rates, then increase the Service Delay time.
- 6 Click **Ok**.

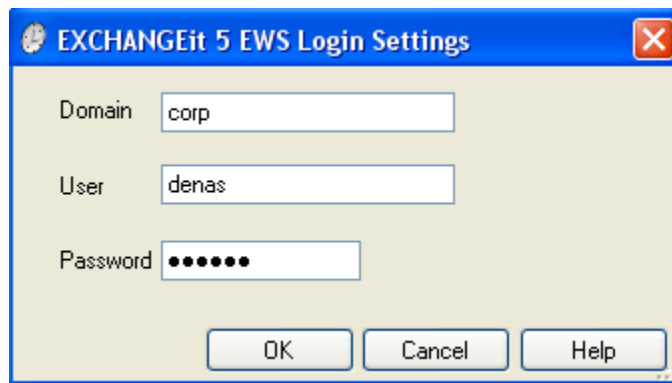
Configure EWS Login Settings

A login profile must be created for each EWS workstation. When the Windows task is stored, these login settings are stored with the task and allow the Windows Task Scheduler to run the task at the proper time. To create or run tasks, the proper network security settings must be associated with each login.

Steps

- 1 Click **Start | All Programs | AnyDoc Software Suite | EXCHANGEit 13.4 EWS Client**.
- 2 From the **Setup** menu, click **Login**.

The **EXCHANGEit EWS login Settings** window is displayed.



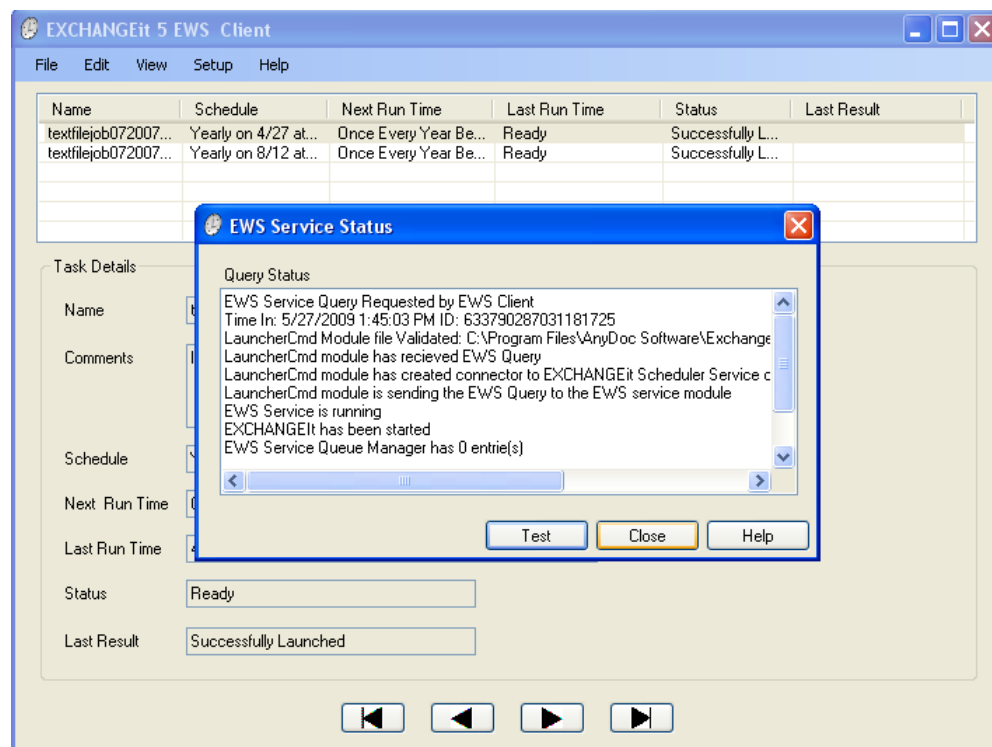
- 3 In the **Domain** field, enter the domain the user belongs to.
- 4 In the **User** field, enter the user name that will be associated with all tasks that are created or run.

- 5 In the **Password** field, enter the password for the specified user.
- 6 Click **OK**.

EWS Diagnostic Query

The Diagnostic Query tool allows the EWS to query EXCHANGEit and assign a unique ID number based on the system time at the beginning and end of each query.

If the proper response message arrives back from EXCHANGEit, EWS should run properly. Several tests are conducted, including validating the ExchangeitLauncherDN.exe file, checking the display of the EWS Server status, and the release of the EXCHANGEit COM object.



Chapter 8

Work with Project Nodes

A project can have one source and multiple links and destinations. Each of these elements within the project has an associated node that displays in a tree structure in the left project pane. The node stores the information pertaining to its type, which is either a source, destination, or link. Click a node to display its information in the right project pane.

Each node type has its own set of functions. To access these functions, right-click the node or highlight the node and select the function from the toolbar.

Functions for source nodes include:

- Paste
- Reset
- Add Link/New Field
- Add Destination

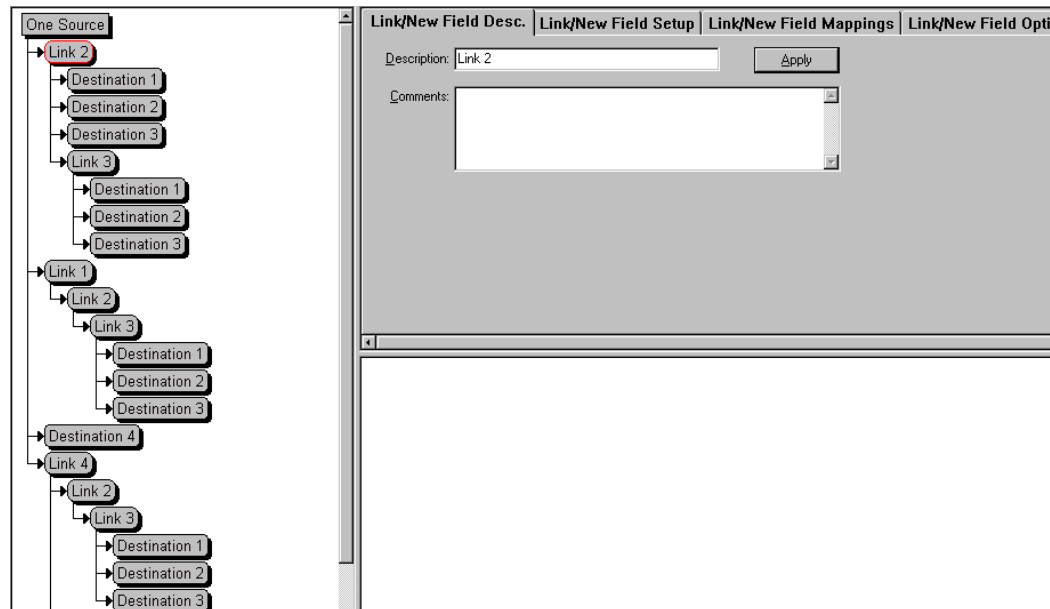
Functions for destination nodes include:

- Cut
- Copy
- Delete
- Reset

Functions for link nodes include:


- Cut
- Copy
- Paste
- Delete
- Reset
- Add Link/New Field
- Add Destination

A source can have any number of destinations, new fields and links. Additionally, the same link, destination and new field can be repeated numerous times in the same project. So the tree can be as complex or as simple as necessary to successfully move the source information to the destination. The image below shows a series of repeating nodes.



Add Destination Nodes


New destination nodes can be added in two ways:

- Right-click a source or link node and select **Add Destination**.
- Click the **Add Destination** button, , on the toolbar.

Adding destinations is discussed in detail in the Destinations (page [97](#)) section. Refer to this section for instructions on adding all of the available destinations to an EXCHANGEit project.

Add Link/New Field Nodes

New link/new field nodes can be added in two ways:

- Right-click a source or link node and select **Add Link/New Field**.
- Click the **Add Link/New Field** button, , on the toolbar.

Adding links and new fields is discussed in detail in the Links/New Fields (page [259](#)) section. Refer to this section for instructions on adding links and new fields to an EXCHANGEit project.

Reset Source Nodes

Only one source can be setup in the source node, and some options selected while setting up the source cannot be changed after setup is complete. However, it is possible to reset the source node. Resetting the node removes the previous settings in the source and allows a new source to be setup or the same source to be setup in a different way. Any options selected in the source tab folders are removed and returned to the default settings.

Two options are given when resetting a source:

- Remove the field mappings in the Source Mappings tab folder in addition to removing the setup from the remaining source tab folders. Select this option to map new fields.
- Keep the field mappings in the Source Mappings tab folder, but remove the setup in the remaining source tab folders. Select this option if the new source file contains the same fields.

Steps

- 1 Select the source node to reset. Selected nodes are outlined in red.
- 2 Right-click and select **Reset**. A prompt displays asking if you want to reset the selected node.
- 3 Click **Yes** to confirm the reset or **No** to clear the action.
If Yes was selected, another prompt displays asking if you want to reset the field mappings.
- 4 Click **Yes** to map new fields or click **No** to keep the current field mappings.
If No was selected, the Source Mappings tab contains the same field mappings as before.

Reset Destination Nodes

Similar to the source node, only one destination output can be defined per destination node. Resetting the node removes the previous settings in the destination and allows a new destination to be setup or the same destination to be setup in a different way. Any options selected in the destination tab folders are removed and returned to the default settings.

Steps

- 1 Select the destination node to reset. Selected nodes are outlined in red.
- 2 Right-click and select **Reset**. A prompt displays asking if you want to reset the selected node.
- 3 Click **Yes** to confirm the reset or **No** to clear the action.

Reset Link/New Field Nodes

Link and new field nodes are interchangeable because a link or new field is setup in the same tab folders. The only difference is what exactly is being setup in the tab folders. As with the source and destination, only one type of setup is possible in the Link/New Field Setup tab folder, although the option is available to reset the node. Resetting the node removes the previous settings in the link/new field and allows a new type of setup or an altered version of the previous setup to be entered in the tab folders. Any options selected in the link/new field tab folders are removed and returned to the default settings.

Steps

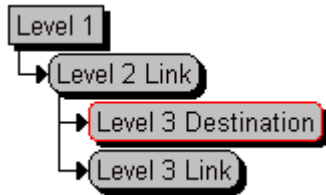
- 1 Select the link/new field node to reset. Selected nodes are outlined in red.
- 2 Right-click and select **Reset**. A prompt displays asking if you want to reset the selected node.
- 3 Click **Yes** to confirm the reset or **No** to clear the action.

Cut, Copy and Paste Nodes

Use the Cut function to move the node to a new location within the tree. Use the Copy function to make a copy of a node and add it to another location within the tree. The copied version is independent of the original version, so that changes made to one version are not automatically made to copied versions. Cut and copied nodes are held in the clipboard until pasted.

Multiple Levels

Nodes occur at different levels within the tree. The source node is always at the outer most level and all other node types can occur at different levels below the source.



When a node has nodes attached to it at lower levels, the top and subsequent level nodes act as a group. So if the top level node is cut or copied, subsequent level nodes are also cut and copied. For example, a level 2 node has subsequent nodes below it at level 3. When the node at level 2 is copied, the nodes at level 3 are also copied.

Cut and copy are available for the following node types:

- Destination
- Link

Cut and copied nodes can be pasted to the following node types:

- Source
- Link

The same link node can be pasted to itself and to other links.

To Cut or Copy a Node

- 1 Select the destination or link node to cut or copy. Selected nodes are outlined in red.
- 2 Right-click the node and select **Cut** or **Copy**.

To Paste a Node

- 1 Select the source or link node in which to paste the cut or copied node.
- 2 Right-click the node and select **Paste**. The cut or copied node and its subsequent nodes are pasted at one level below the selected node.

Change the Font

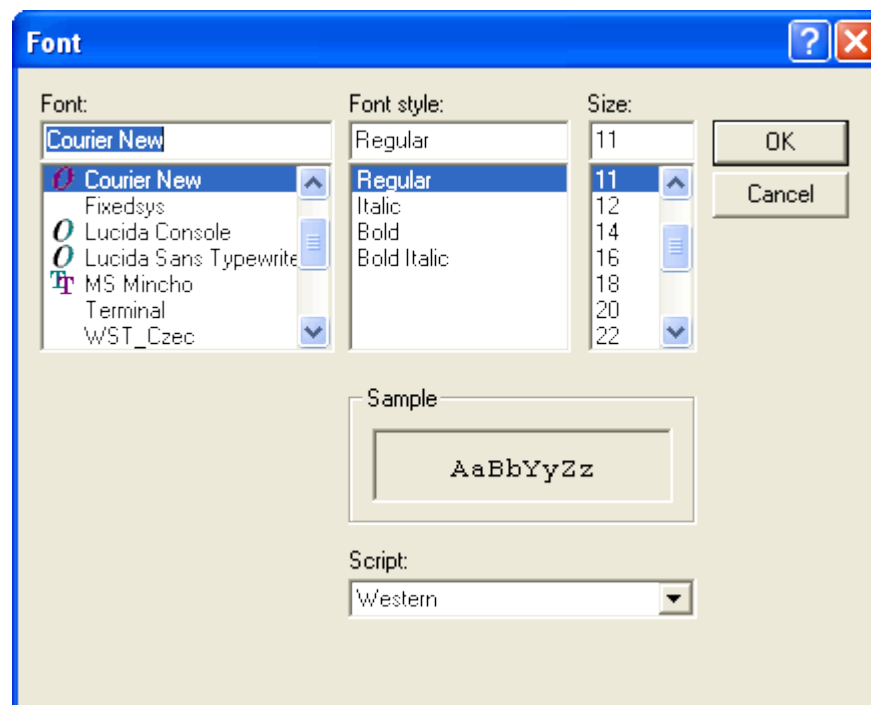
Customize the font used to display node text under the **Job | Change Font** menu. This setting is unique to the workstation and changes the font only for the open project. Change the font to a larger size to accommodate persons with low vision or to increase or decrease the node size. The node size is relative to the font. The default font settings are as follows:

- Font: Arial
- Font style: Regular
- Size: 10
- Color: Black
- Script: Western

Steps

- 1 Open the .XJB project file to change the font.
- 2 Select **Job | Change Font**.

The **Font** window is displayed.



- 3 Enter changes.

- 4 Click **OK** to save the font changes.

Expand and Collapse Nodes

Nodes comprise the tree structure in the left pane of a project window. Due to the nature of the tree structure, nodes occur at different levels below the source node and may even continue below the viewable area of your computer screen. Each level is referred to as a "branch" on the tree. EXCHANGEit provides menu options to expand or collapse the branches to provide more control over the viewable area. These menu options are located under the View menu and include the following:

- **Expand Tree One Level** - if the collapsed branch has more than one level, only the first level beneath the selected node is expanded
- **Expand Tree Branch** - expands all levels of the collapsed branch, rather than just the first level
- **Expand Entire Tree** - expands all collapsed branches throughout the tree
- **Collapse Tree Branch** - collapsed the nodes beneath the selected node

The options are available only when they apply to a selected node; otherwise the options are grayed out. For example, if the last node in the tree is selected, the Expand Tree One Level option is grayed out because no more levels exist below the selected node and no more levels can be expanded.

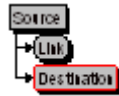
Steps

- 1 Select the node to expand or collapse. Selected nodes are outlined in red.
- 2 Select the appropriate menu option under the **View** menu. Options include:
 - **Expand Tree One Level** - if the collapsed branch has more than one level, only the first level beneath the selected node is expanded
 - **Expand Tree Branch** - expands all levels of the collapsed branch, rather than just the first level
 - **Expand Entire Tree** - expands all collapsed branches throughout the tree
 - **Collapse Tree Branch** - collapsed the nodes beneath the selected node

Zoom In and Out

Because the tree structure may extend below the viewable area of your computer screen, you can choose to zoom in and out of the tree structure to see more or less nodes. Zoom options are located under the View menu.

- Zoom out to decrease the node size, thereby increasing the number of nodes that can be viewed on screen.



Zoom Out

- Zoom in to increase the node size, thereby decreasing the nodes that can be viewed on screen or to restore the nodes to their original size.

Zoom In

Steps

- 1 From the **View** menu, select the appropriate option:
 - **Zoom 25%** - decreases the nodes to 25% of their original size
 - **Zoom 50%** - decreases the nodes to 50% of their original size
 - **Zoom 75%** - decreases the nodes to 75% of their original size
 - **Zoom 100%** - returns the nodes to their original size
 - **Zoom 150%** - increases the original node size by 50%
 - **Zoom 200%** - increases the original node size by 100%
 - **Zoom 300%** - increases the original node size by 200%
 - **Zoom Custom** - allows a custom zoom percentage to be entered
- 2 If **Zoom Custom** was selected, enter the **Y-Axis Zoom** and **X-Axis Zoom** percentages and click **OK**.

The node size changes according to the option selected.

Delete Nodes

Destination and link nodes can be deleted. Source nodes cannot be deleted. If a source is no longer necessary or needs to be changed, reset the node or delete the .XJB file. Only the selected node is deleted. Nodes occurring at levels below the selected node are not deleted, but are moved up one position in the tree.

Steps

- 1 Highlight the destination or link node to delete. Selected nodes are outlined in red.
 - 2 Right-click the node and select **Delete**.
- OR

Work with Project Nodes

From the main menu, select **Edit | Delete**.

A confirmation window is displayed.

- 3 Click the **Yes** button to delete the node or the **No** button to clear the action.

Chapter 9

History Database

Information is tracked on all jobs that EXCHANGEit processes and is stored in a History database. The History database also logs error messages when a job fails. For more information, see [Handling Record Errors](#) (page [297](#)).

Two tables are created in the History database:

- **Master History table:** The Master History table contains records of the transactions that occur when a job is processed, such as how many records are added.
- **Detail History table:** The Detail History table contains further details into the transactions, such as where and why an error occurs and when a field is truncated.

An empty history database is automatically created during installation. The AnyDoc EXCHANGEit Data Source Name (DSN) is also created. However, if a database or DSN already exists from a previous version, they will not be overwritten.

Generate a History Database Report

The history report can be viewed on the window, saved to a folder or printed as a hard copy. The history report is especially helpful when reporting issues to Technical Support.

The report displays the following items:

- **Job Name** - lists the name of the job to which the report refers
- **Start** - shows the date and time the job began
- **Stop** - shows the date and time the job finished
- **Add** - indicates how many records were transferred
- **Upd** - indicates how many records were updated
- **Err** - indicates how many errors were found
- **Error** - indicates the record in which the error was found and the nature of the error. To investigate and correct any errors that occurred in a job, open the Exception Handler (page [300](#)).

Steps

- 1 From the **View History Database** window, select the job name and click **Reports**.

History Database

The History Reports window appears. window is displayed. jobs to include in the report. Options include:

- **Selected Jobs** - generates a report on jobs selected from the View History Database window
- **Date Range** - selects jobs based on a range of dates. Indicate the **Start Date** and **End Date** in the drop down lists.
- **All Jobs** - generates a report on all processed jobs



To select several jobs that are adjacent to one another, select the first job, press the [Shift] key and select the last job. To select several jobs that are not adjacent to one another, press the [CTRL] key and select the jobs.

- 2 Click **OK**.

The **Reports** window is displayed.

- 3 Select where to generate the report. Options include:

- **Screen**

The report is displayed on the screen in the **Report** window. Click **Close**.

- **File**

Specify the name and location to save the report and click **Save**. The file is saved as a .TXT file.

- **Printer**

Specify the print options and click **OK**.

Purge the History Database

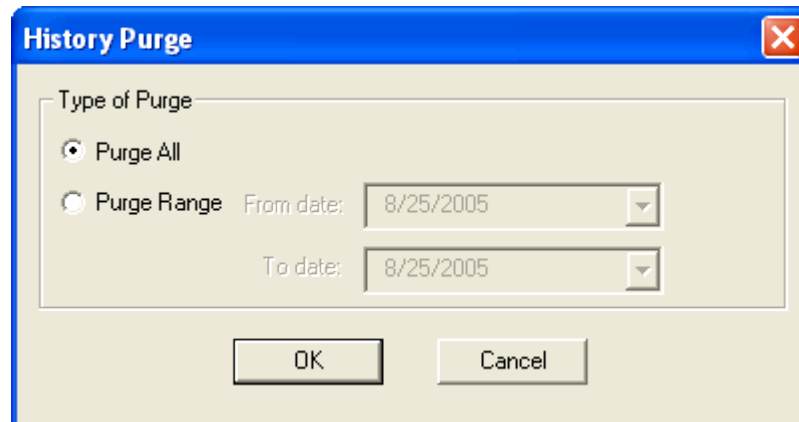
Over time, the History Database can increase in size as jobs are processed. Therefore, consider purging either a portion or the entire History Database.



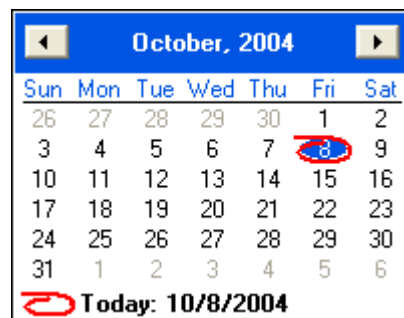
Backup the database before purging. Purged data cannot be recovered!

Steps

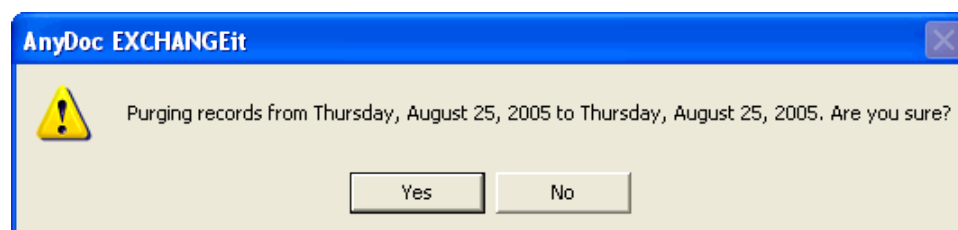
- 1 Select **Management | Purge History database**. The History Purge window is displayed.



- 2 Select the **Purge All** radio button to purge the entire History Database
OR
Select the **Purge Range** radio button to purge records that were processed within a particular range of dates.
- 3 If the **Purge Range** radio button was enabled, select a date from the **From date** field. A calendar appears.



- 4 Select a date and click **OK**. The selected date appears in the From date field. Change the month by clicking the forward and back arrows at the top of the calendar.
- 5 Follow the same procedure in the **To date** field.
- 6 Click **OK**. A window appears asking to confirm the purge.



History Database

- 7 Click **Yes** to purge the records
OR
Click **No** to cancel the action.

Chapter 10

Handle Record Errors

EXCHANGEit provides the following tools to manage and report errors that occur while processing jobs:

- **Error Threshold** (page [297](#)): Indicates how many errors can occur before the job is stopped.
- **History Database** (page [297](#)): Provides a list of jobs and the number of errors within the job.
- **History Database report** (page [293](#)): Generates a list by selected jobs and indicates any errors that occurred during processing; helpful when reporting issues to Technical Support.
- **Exception Handler** (page [300](#)): Logs only errors, or "exceptions," and aids in the investigation and correction of errors to resubmit the jobs for processing.
- **Trace file** (page [11](#)): Logs all transactions and events that occurred within the transaction, including errors.


Set the Error Threshold

Define an error threshold to indicate the number of errors that can occur while processing a job in the range of 1-999. The job is stopped when the error threshold is met. For example, if the Error Threshold is set at one, EXCHANGEit cancels the job after encountering one error.

Enter the error threshold number in the Dest. Options tab | Error Threshold field. Set the error threshold number according to your company's policy.

Identify Errors through the History Database


The History Database contains a list of processed jobs and any errors in each job. Access the History Database from two locations:

- **Job Scheduler** window
- **View Errors** button, 

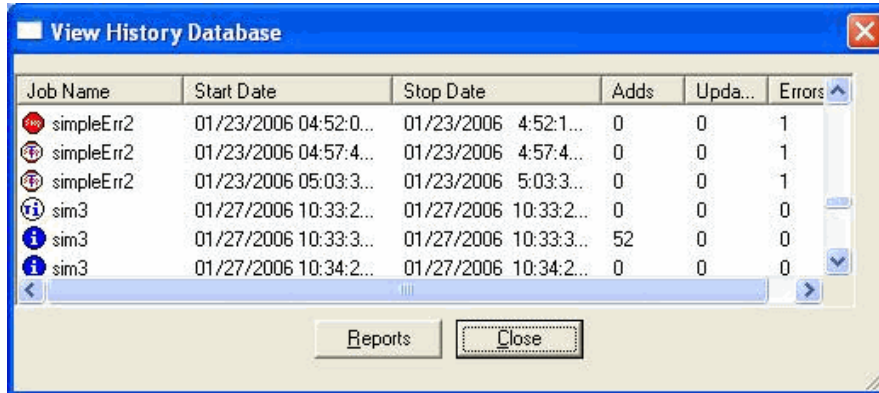
The View Errors button is available if an error occurs when a scheduled job is run.







Steps





Handle Record Errors

- 1 Do one of the following:
 - In the Job Scheduler window, select a job and click **View History Database**
 - In the Job Scheduler window, select **Management | History Database**.
 - From the EXCHANGEit toolbar, click the **View Errors** button, .

The **View History Database** window displays all jobs. A red stop sign displays next to the job that contains the error.

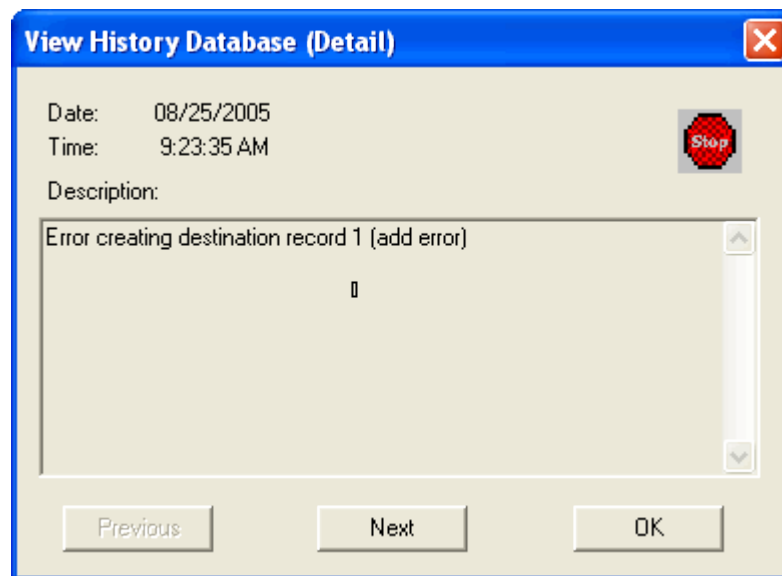


Job Name	Start Date	Stop Date	Adds	Upda...	Errors
 simpleErr2	01/23/2006 04:52:0...	01/23/2006 4:52:1...	0	0	1
 simpleErr2	01/23/2006 04:57:4...	01/23/2006 4:57:4...	0	0	1
 simpleErr2	01/23/2006 05:03:3...	01/23/2006 5:03:3...	0	0	1
 sim3	01/27/2006 10:33:2...	01/27/2006 10:33:2...	0	0	0
 sim3	01/27/2006 10:33:3...	01/27/2006 10:33:3...	52	0	0
 sim3	01/27/2006 10:34:2...	01/27/2006 10:34:2...	0	0	0

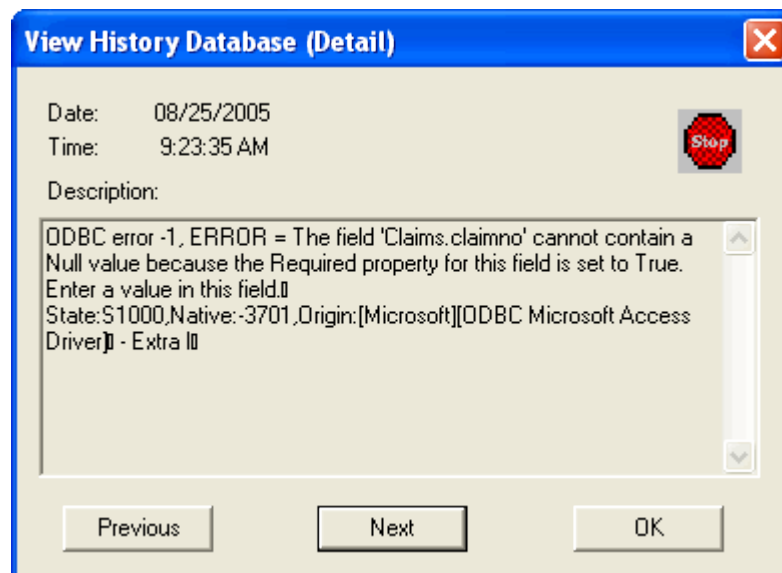
-  icon indicates a job run in Test mode
-  icon indicates an error encountered during a Test run
-  icon indicates a job run in Production mode
-  icon indicates an error occurred while processing the test or production job

- 2 Double-click the job to view.

The **View History Database (Detail)** window displays the date, time and record that contains the error.



- 3 Click **Next** to see additional details, such as the cause and possible resolution, about the error.



- 4 Click **Previous** to return to the previous window.
- 5 To view more errors, click **Next** again and repeat the process.
- 6 Click **OK**.

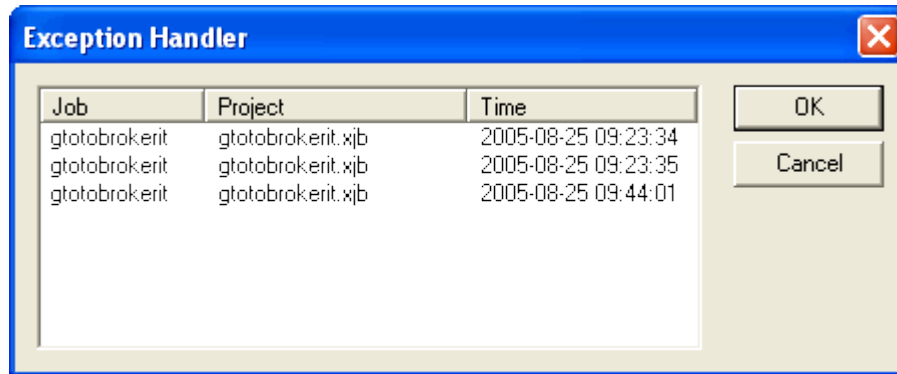
Exception Handler

Errors that occur during the processing of information between the source and destination are logged to the Exception Handler. These errors, or "exceptions," have an .XCP file extension and are stored in a log file in the job file directory, which is configured at **Preferences | Directories | Job File Directory**. The Exception Handler provides the option to edit incorrect data and reprocess the data without having to reprocess the entire job.

The job can be reprocessed from the following windows:

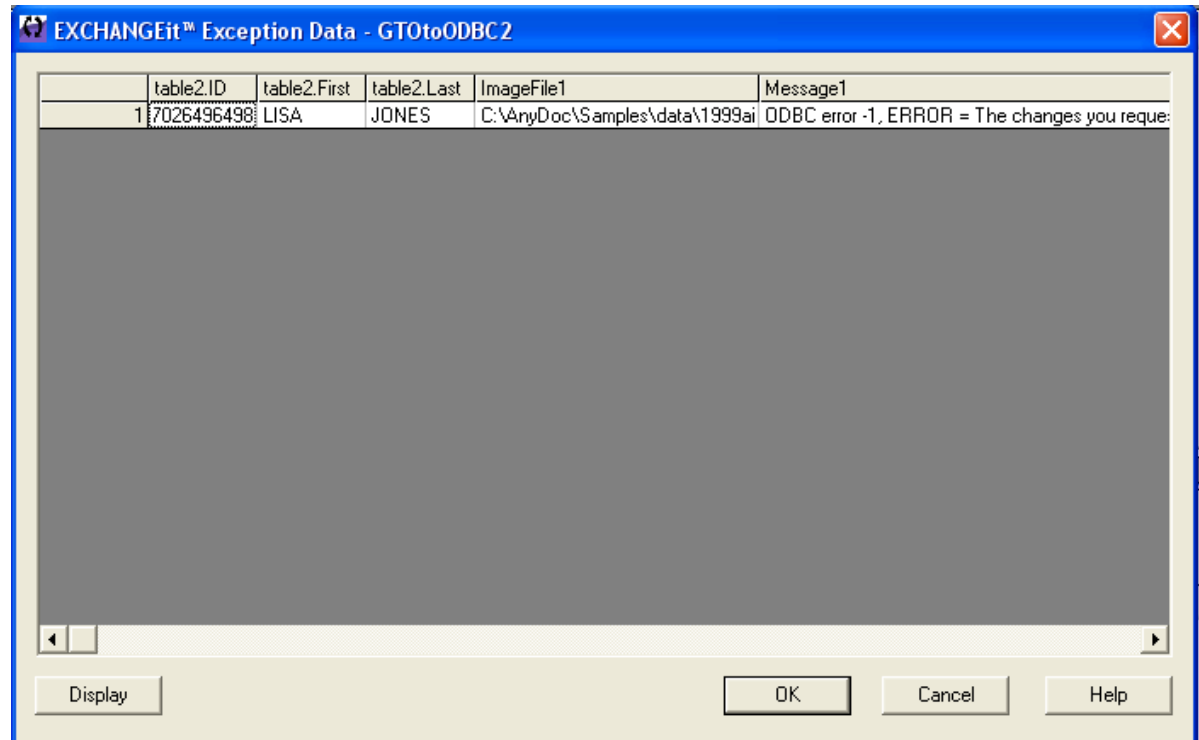
- **Exception Handler**

If the errors within the job have already been corrected, but the job has not been reprocessed, reprocess the job from the **Exception Handler** window by right-clicking the job and selecting **Reprocess**.



- **Exception Data**

If it is not necessary to view the image containing the errors, correct the fields directly from the **Exception Data** window. When all fields have been corrected, right-click in the **Exception Data** window and select **Reprocess**.



- **Exception Record**

Access the Exception Record window from **Management | Exception Handler** and double-click the job to resolve. Then select a row and click **Display**. The **Exception Record** window displays the image containing the incorrect field values. Additionally, the Exception Record window provides the ability to zoom up and down the image using the **Zoom Down** and **Zoom Up** buttons or the sliding toolbar to get a closer look at the fields. When all fields have been corrected, click **Reprocess**.

Handle Record Errors

For some image formats, such as PDF, the PDF toolbar is provided. PDF images are created by selecting the **Export PDF Images** check box in the **Source Options** tab.

Exception Record

Error Message:
 ODBC error -1, ERROR = The changes you requested to the table were not successful because they would create duplicate values in the index, primary key, or relationship. Change the data in the field or fields that contain duplicate data, remove the index, or redefine the index to permit duplicate entries and try again.
 State:23000,Native:-1605,Origin:[Microsoft][ODBC Microsoft Access Driver] - Extra Information = ID=7026496498 First=LISA Last=JONES

Name	Value
table2.ID	7026496498
table2.First	LISA
table2.Last	JONES

Zoom Up

Zoom Down

Reprocess Previous Next Close Help

If the job was reprocessed successfully, errors are removed from the Exception Handler window. After reprocessing, the Exception Handler Statistics window displays to provide statistics polled from the reprocessed job, such as how long each record took to correct, how many records successfully reprocessed and how many records failed to reprocess.

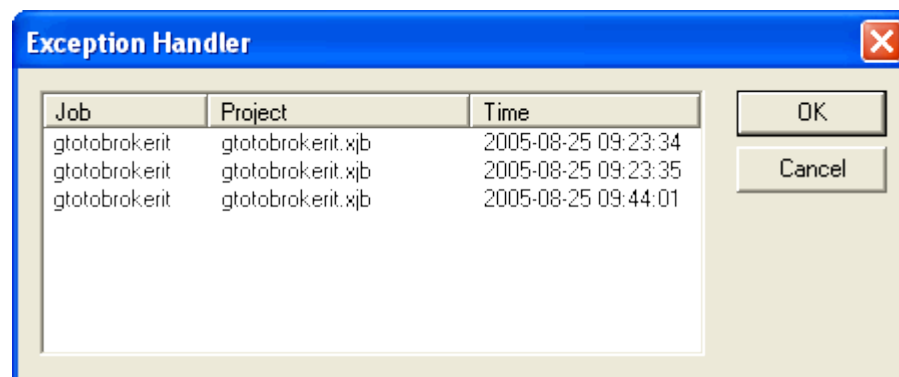


Correct Errors with the Exception Handler

Steps

- 1 Select **Management | Exception Handler**.

The **Exception Handler** window is displayed. The last job displayed is the one run most recently.



The following information displays in the **Exception Handler** window:

- **Job** - name assigned to the processed job

Handle Record Errors

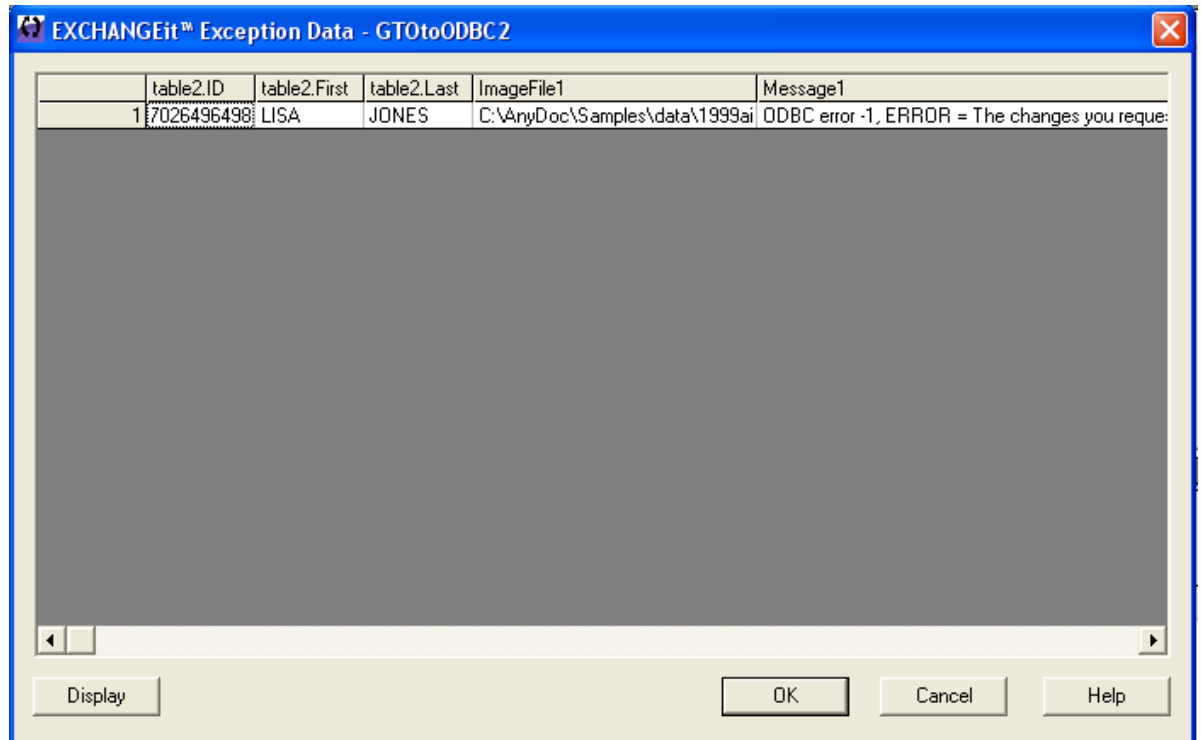
- **Project** - name assigned to the project
- **Time** - date/time the job was processed



If it is necessary to change the setup, click **Edit Configuration** and repeat the setup process again.

- 2 Double-click the job in the **Job** column.

The **Exception Data** window displays the records that contain errors.



- 3 Select the row and click **Display**.

The **Exception Record** window displays the fields, field values and image associated with the record. The **Error Message** field indicates the reason for the error.

Exception Record

Error Message:
 ODBC error -1, ERROR = The changes you requested to the table were not successful because they would create duplicate values in the index, primary key, or relationship. Change the data in the field or fields that contain duplicate data, remove the index, or redefine the index to permit duplicate entries and try again.
 State:23000,Native:-1605,Origin:[Microsoft][ODBC Microsoft Access Driver] - Extra Information = ID=7026496498 First=LISA Last=JONES

Name	Value
table2.ID	7026496498
table2.First	LISA
table2.Last	JONES

1999
 AllM International
 microsystems technology
 Information Capture Software
 First Name: LISA, Last Name: JONES
 Company: MICROSYSTEMS TECHNOLOGY, Phone: 702-444-4444
 Street Address: 401 E. JACKSON STREET, Suite 1200, Tampa, FL 33607
 City: TAMPA, State: FL, Zip: 33607
 Province: FL, Country: USA, Postal Code: 33607
 International Phone: , International Fax:
 What best describes your company's business?
☐ Government ☐ Manufacturing ☐ Health Care ☐ Law Enforcement ☐ Retail ☐ Service Business ☐ Tele Comm / Utilities ☐ Insurance ☐ Other
 What best describes your discipline?
☒ End-User ☐ VAR ☐ Integrator ☐ Software Vendor
 How many people within your company are responsible for entering data from forms?
☐ 1-9 ☐ 10-24 ☐ 25-49 ☐ 50-99 ☒ 100+
 What types of forms do these people key in?
 All types
 What types of forms would you like to see Web-enabled?
 None
 Do you use any type of internal e-forms? If so, what type of forms?
 Time Card
 Who else within your organization would be interested in this type of technology?
 Operations Manager

Zoom Up
 Zoom Down

Reprocess Previous Next Close Help

- 4 Double-click in the field containing the error and enter the correct field value.
- 5 Click **Reprocess** to process the job again.
- 6 If more than one record contains an error, click **Next** to move to the next record.
- 7 Continue to correct and reprocess the records.

Handle Record Errors

The **Exception Handler Statistics** window displays after a job is reprocessed to provide statistics polled from the reprocessed job, such as how long each record took to correct, how many records successfully reprocessed and how many records failed to reprocess.

If the **Records Failed** statistic displays a number above zero, one or more records were not successfully reprocessed. Repeat the exception process again to correct the error.



- 8 Click **OK**.

The **Exception Data** and **Exception Handler** windows are empty when all records have been corrected and reprocessed.

View the Log File

Steps

- 1 Close EXCHANGEit.
- 2 Open Windows Explorer.
- 3 Navigate to the trace file directory, which is configured at **Preferences | Directories | Trace File Directory**.
- 4 Select the appropriate log file. The log file for the last time that EXCHANGEit was run appears as **EXCHANGEit.log**. Old log files use the format: **EXCHANGEit###.log**, where **###** is the numerical sequence of their appearance in the directory.
- 5 Open the log file with a text editor, such as Notepad.

Chapter 11

Use VBScript

In EXCHANGEit, VBScript can be attached to sources, links, destinations, and AccuZip objects to manipulate the data in records by performing mathematical calculations, changing the data, skipping records, creating new field values based on source/link information and testing the data for logical relationships.

To effectively use VBScript in EXCHANGEit, you need to understand VBScript conventions as well as EXCHANGEit proprietary conventions.

Job Scripts Tab

VBScript can be attached to any source, destination, and link on the Job Scripts tab. The Job Scripts tab displays throughout EXCHANGEit wherever VBScript can be implemented.

There are three types of scripts available on the Job Scripts tab:

- 1 Global
- 2 Project
- 3 File

The screenshot shows the 'Job Scripts' tab with three main sections labeled 1, 2, and 3. Section 1 is 'Global' and contains 'Initialize' and 'Clean Up' buttons, each with an 'Expression' field. Section 2 is 'Project' and contains 'Header' and 'Trailer' buttons, each with an 'Expression' field. Section 3 is 'File' and contains 'Header' and 'Trailer' buttons, each with an 'Expression' field. At the bottom, there is a checkbox labeled 'Debug VB Script?'.

Global Scripts

Global scripts are run either before or after a job is run regardless of whether any processing has occurred. If the global script is entered in the source, destination, or link, the global script is the same and applies to the entire job.

Global Script Types	Description
---------------------	-------------

Use VBScript

Global Script Types	Description
Initialize	<p>Initialize scripts are run before the job. These scripts are processed regardless of whether any records or files require processing. Enter the following scripts and code under Global Initialize:</p> <ul style="list-style-type: none"> • Global variables • Any code that must be run regardless of whether any processing has occurred <p>For example</p> <p>Run an Initialize script to record what time the transaction was attempted. This script can be run even if the output directory has no files to process.</p>
Clean Up	<p>Clean Up scripts are run after the job is completed.</p> <p>Enter the following scripts and code under Global Clean Up:</p> <ul style="list-style-type: none"> • Object clean up • Final code that always runs after the job is complete <p>For example</p> <p>Run a Clean Up script to record what time the transaction was completed. This script can be run even if the output directory has no files to process.</p>

Project Scripts

Project Scripts are run before and after any data is processed and records are output. Project scripts allow a user to give a custom text file structure by outputting header and trailer records as needed based on Job, File, or Record levels.

Project Script Types	Description
Header	Header scripts are run before the first record is output. Unlike the Initialize script, output files must be present for a Project Header script to run.
Trailer	Trailer scripts are run after the last record is output. Unlike the Clean Up script, output files must be present for a Project Trailer script to run.

File Scripts

File scripts are run either before or after an input file is processed. The file Header/File Trailer scripts only apply if there is a *.txt, *.gto, or *.xml source file. Imaging or database sources do not apply here.

File Script Types	Description
Header	Header scripts are run before an input file is processed. This script type is only useful for sources with multiple input files that are GTO, XML or TXT.
Trailer	Trailer scripts are run after an input file is processed and before the next input file. This script type is only useful for sources with multiple input files that are GTO, XML or TXT.

Debug VBScript

Select this check box to stop the job and display the VBScript Error window when errors are encountered while running a job. For more information, see Edit VBScript Errors (page [330](#)).

Expression Builder


Enter VBScript in the Expression Builder. To access the Expression Builder click

 Expression. The button changes to  Expression, indicating that VBScript exists. For more information, see Use the Expression Builder (page [314](#)).

Converting Old Scripts

VBScript in job files prior to EXCHANGEit version 4.4 will be processed as before.

Prior to EXCHANGEit 4.4, VBScript was implemented wherever the Expression

button,  Expression occurred. However, if the job file is changed and saved in EXCHANGEit 4.4 or above, EXCHANGEit prompts you to promote the VBScript to the new format.

Consider the following when promoting VBScripts from EXCHANGEit version 4.3 and below to version 4.4 and above:

- The *Run Once Per Job* Link expressions are removed from the job. You are warned prior to the script being removed; however, you must enter the script again using the new object model. The Global Initialize or Project Header script locations are similar to the *Run Once Per Job* Link expressions in that they are only run once. However, they are run before the Source Expression, rather than after.
- New Field expressions are relocated to the Link expression and automatically prefixed in the order that they are run.

VBScript Basics

You should have a basic understanding of the following concepts:

- **Procedure**

A set of code that performs a function. For example, you could build a script in Expression Builder to create a list of products that fall below a specified inventory level (see Example 1 - Inventory Check (page [331](#))). Procedures are usually composed of statements, which are structured like a sentence: data fields and/or variables work as nouns and functions resemble verbs.

Formatting a procedure makes it more readable. This involves using white space. Nested blocks of code should also be indented four spaces, such as in Flow of Control statements.

- **Variable**

Item being manipulated while the VBScript is being run. Use existing variables or write new variables. For VBScript to correctly interpret your variable, do the following:

- Begin with a letter.
- Include any combination of letters, numbers, and underscores.
- Be unique.

Conversely, do not do the following:

- Contain embedded characters. For example, new.name.
- Exceed 255 characters.
- Use a reserved word, that is a word that has special meaning to the VBScript compiler such as If, Then, or Else.

- **Constant**

Stores types of data that do not change, such as numbers and letters.

- **Function**

Performs specific tasks that return values. In EXCHANGEit, functions are used to operate on fields one step at a time. Functions can contain arguments or expressions, which customize what the function does. For instance, the Right function contains two arguments: string (the field to manipulate) and length (how many characters are returned).

Some common string functions used with EXCHANGEit include the following:

- Left (string, length) returns a specified number of characters, starting from the

left of a specified string.

- **Right (string, length)** returns a specified number of characters, starting from the right of a specified string.
- **Mid (string, character position, length)** returns a specified number of characters, starting from a specified character position of a specified string.

- **Operators**

Control how VBScript handles values. There are four types of operators: arithmetic (+, -), logical (And, Or, Not), relational (=, <>) and precedence (using parentheses to order how VBScript evaluates an expression). If you do not use parentheses, arithmetic operations occur in the following order:

- 1 Negation
- 2 Exponation
- 3 Multiplication and division
- 4 Integer division and remainder (Mod) operation
- 5 Addition and subtraction

- **Flow of Control**

Defines the order in which code is run. Looping, a specific kind of flow control, allows you to tell the script to run some lines of code repeatedly. VBScript supports If Then/Elseif, GoTo, For/Next, Do/While, Case and Do/Until loops.

- **Comments**

Describe the purpose of the task that the procedure performs. Comments provide clarification of a code's purpose and function. Comments should be brief, and must be prefaced with an apostrophe (single quote) so they remain invisible to the VBScript compiler. Comments are generally separated from code by one space.

VBScript Prerequisites

Before adding VBScript to a job, you must know which sources, links and destinations are to be used. VBScript can be added to the following:

- Source Selection tab
- Link Selections tab
- Destination Selections tab

Use VBScript

- Segments and elements in an EDI destination | Dest. Mappings tab
For an EDI file destination, right-click an element or segment in the tree structure that appears in the right pane of the Dest. Mappings tab. For more information, see [Configure Destination Mappings for an EDI File \(page 141\)](#).

- Job Scripts

When adding VBScript to a job, you must:

- ☐ Configure the source. For more information about available sources, see [Sources \(page 25\)](#).
- ☐ If adding VBScript to an EDI destination, ensure that the EDI destination is configured. For more information, see [Electronic Data Interface \(EDI\) File as a Destination \(page 133\)](#).
- ☐ Add VBScript in the Expression Builder window. For more information, see [Use the Expression Builder \(page 314\)](#).
- ☐ Test run the job. For more information, see [Run a Job \(page 274\)](#).

Using Global Variables in VBScript

The VBScript syntax uses standard VB language. There is no need to wrap field variables in quotation marks.

Global variables have a runtime scope for values. There are six containers for the Global Variables:

- Global Initialize
This script runs before any processing occurs and is used to initialize global variables.
- Global Cleanup
This script runs after all record processing has finished. It can be used as a post-processing step.
- Project Header
This script runs before the first record when there are records to process. The difference between Global Initialize and the script is items like record count and filed items will be available.
- Project Trailer
This script runs after all the records have been processed but the job is not completely ended. A similar post-processing step to Global Cleanup.
- File Header

This script runs before the first record of a file whenever a source file changes. It can be used to reset a local record counter or to zero out totals.

- File Trailer

This script runs after the last record of a file. It can be used as a local record counter or for maintaining totals.

The file Header/File Trailer scripts are only applicable if there is a *.txt, *.gto, or *.xml source file. Imaging or database sources do not apply here.

Typical Syntax for a Global Initialize:

Dim RecordCounter

Dim JobRunAmountTotals

GlobalVars.Record Counter = 0

GlobalVars.JobRunAmountTotals = 0

Typical Syntax for a Global CleanUp Script:

MsgBox "Record Count = " & GlobalVars.RecCounter & vbCrLf & "Job Totals = " & GlobalVars.JobRunTotals

On the destination selection script, the following VB code increments the values:

GlobalVars.RecCounter = GlobalVars.RecCounter +1

GlobalVars.JobRunTotals = GlobalVars.JobRunTotals + Cdbl(Destination.Field9)

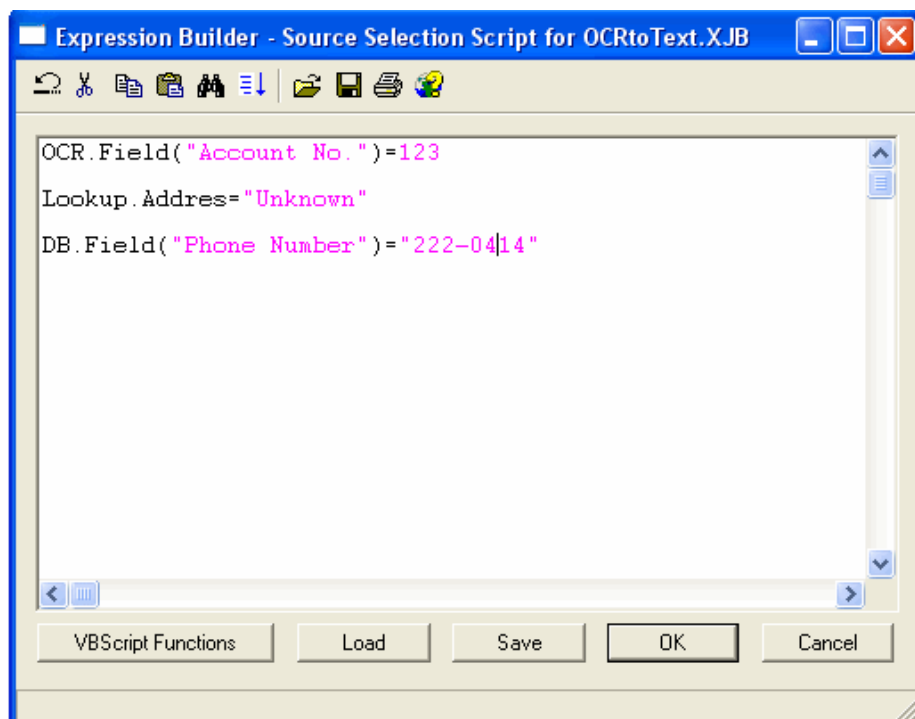
where the Field9 is mapped to a numeric value and wrapped by a Cdbl call to convert the file to a true numeric.

You must use the GlobalVars. prefix when accessing the global variables.




Use the Expression Builder








Adding VBScript to an EXCHANGEit project is convenient with Expression Builder, a tool that generates and edits VBScript. Use the Expression Builder to add a range of code to your projects. Although Expression Builder assists in adding correct code to your project, you must be familiar with VBScript coding conventions. You may enter code manually, or select from the provided objects. VBScript is automatically checked for syntax accuracy when the Expression Builder is closed.

The Expression Builder is accessed from the Job Scripts tab or the Selection tab for the source, destination, or link.



The toolbar contains the following buttons:

Button	Description
	Reverses the last action.
	Deletes the selected text (this does not put the text in the Paste buffer).
	Copies the selected text.

Button	Description
	Pastes copied text.
	Opens the Find window to search for specific text within the script.
	Performs a simple syntax check of the script.
	Opens a text file. The contents of the text file replace the current contents of the VBScript window. This can be used to import a script previously saved as a text file.
	Saves the current script to a text file. This can be used to export a script so it can be used in a different template or zone.
	Prints the script to the default printer.
	Opens the Microsoft VBScript Help. Use it for information related to native VBScript components.

VBScript Functions

Accesses the VBScript Functions window. Double-click the folders to access the available functions, operators, and constants.

Save

Saves the VBScript to a .bas file in the VBScript Library Directory. For more information, see Configure Directory Preferences (page [16](#)).

Load

Opens the VBScript Library Directory so a .bas file can be selected and opened.

OK

Saves the VBScript in the job. However, the job must be saved prior to closing or the VBScript will be lost.

Cancel

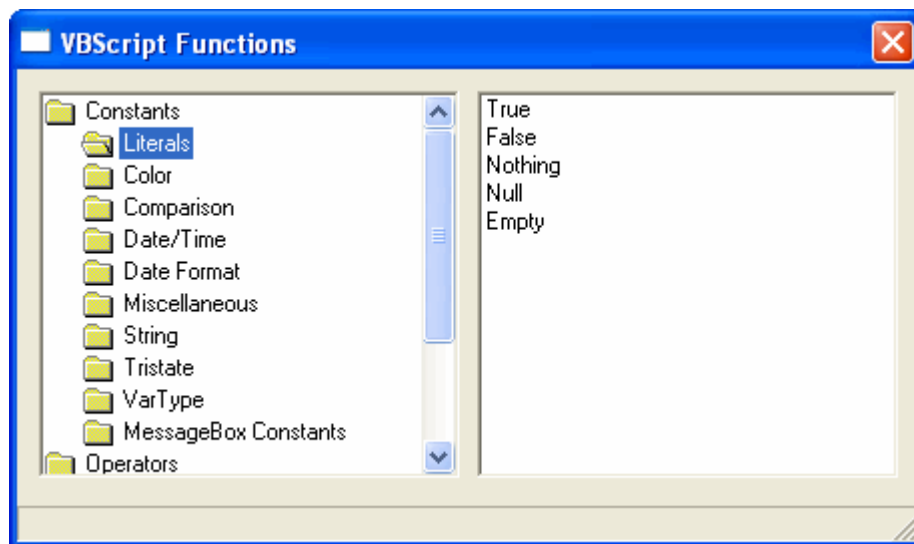
Closes the Expression Builder

Add Constants

Constants are available in the Expression Builder for sources, new fields, and links.

Use VBScript**Steps**

- 1 From the **Job Scripts** tab, click **Expression**.
The **Expression Builder** window is displayed.
- 2 Click **VBScript Functions**.
- 3 Double-click the **Constants** folder. Subfolders to the Constants folder display.
Subfolders are cataloged by the type of constants that are available. Options include:
 - Literals
 - Color
 - Comparison
 - Date/Time
 - Date Format
 - Miscellaneous
 - String
 - Tristate
 - VarType
 - MessageBox Constants



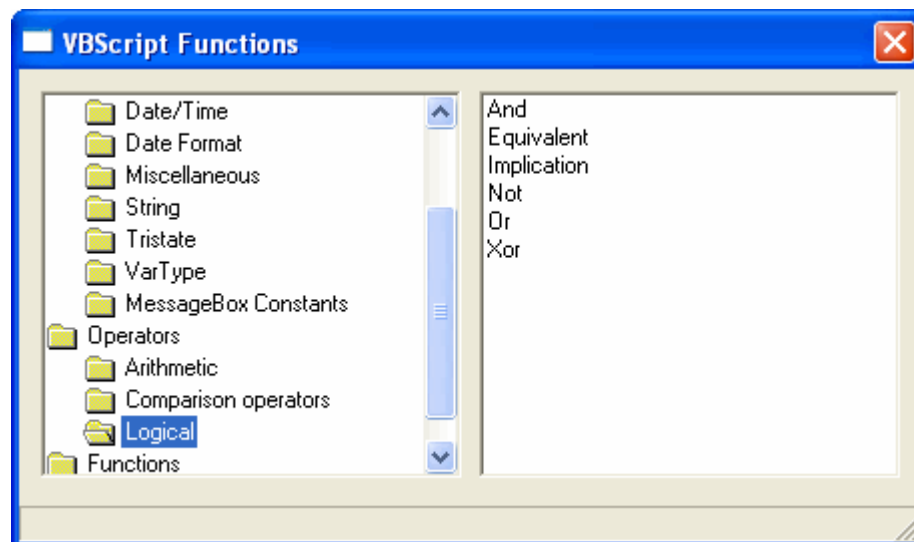
- 4 Click the subfolder pertaining to the constant to insert into the expression. The constants within the selected subfolder display in the Elements pane.
- 5 Double-click the constant to insert into the expression. The constant is added to the

Code Entry pane.

Add Operators

Steps

- 1 From the **Job Scripts** tab, click **Expression**.
The **Expression Builder** window is displayed.
- 2 Click **VBScript Functions**.
- 3 Double-click the **Operators** folder. Subfolders to the Operators folder display.
Subfolders are cataloged by the type of operators that are available. Options include:
 - Arithmetic
 - Comparison operators
 - Logical



- 4 Click the subfolder pertaining to the operator to insert into the expression. The operators within the selected subfolder display in the Elements pane.
- 5 Double-click the operator to insert into the expression. The operator is added to the Code Entry pane.

Add Functions

Functions are available in the Expression Builder for sources, new fields and links.

Steps

Use VBScript

- 1 From the **Job Scripts** tab, click **Expression**.
The **Expression Builder** window is displayed.
- 2 Click **VBScript Functions**.
- 3 Double-click the **Functions** folder.
Subfolders to the Functions folder are displayed. Subfolders are cataloged by the type of functions that are available. Options include:
 - Conversion
 - Date/Time
 - Math
 - Text
 - Variants
 - Miscellaneous
- 4 Click the subfolder pertaining to the function to insert into the expression. The functions within the selected subfolder display in the Elements pane.
- 5 Double-click the function to insert into the expression.
- 6 Add or delete expressions as needed. Replace the space holder, <<Expr>>, with a variable to hold the converted value.

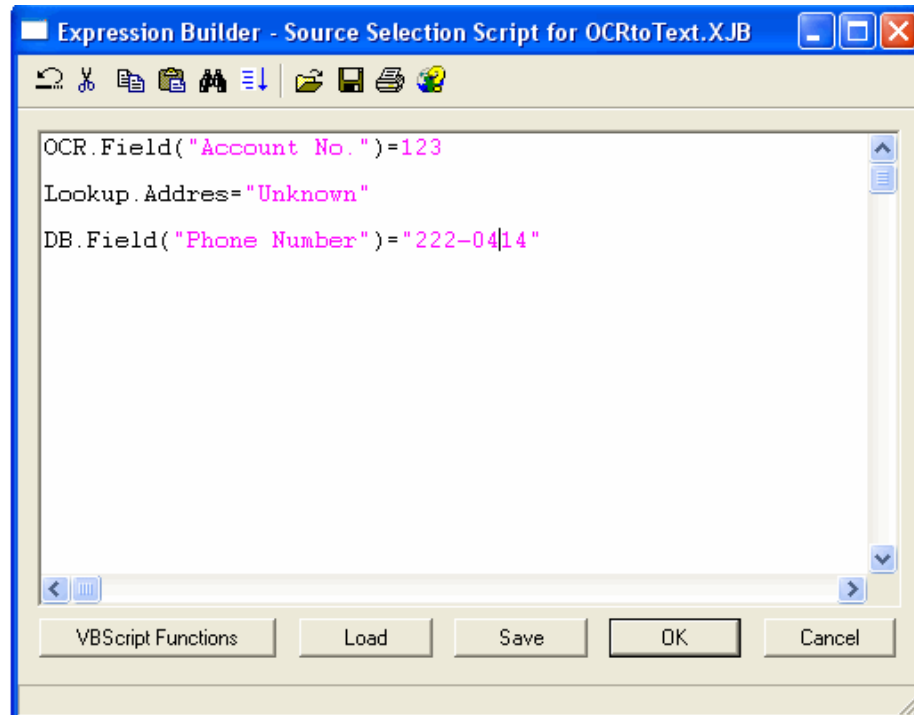
Add Field Names

Field names are only available in the Expression Builder window when adding the field names to sources, links, or destinations.

Steps

- 1 From the **Destination/Source/Link Selection** tab, click **Expression**.

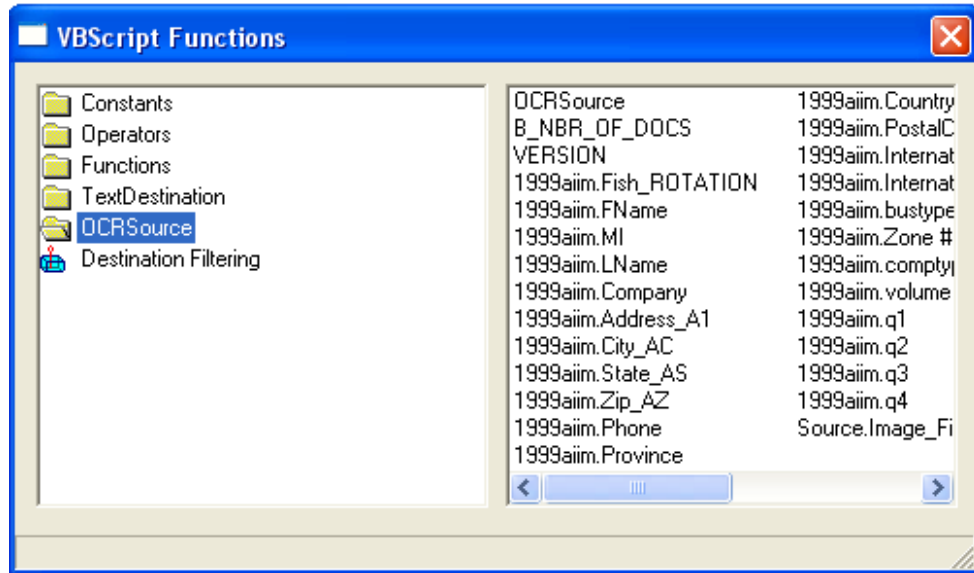
The **Expression Builder** window is displayed.



- 2 Click **VBScript Functions**.
- 3 Double-click the source, destination, or link folder.

Use VBScript

The folder is named the same as the source, destination, or link description specified on the **Source**, **Destination**, or **Link Desc.** tab. The field names are displayed in the right pane.



- 4 Double-click a field name.
It is entered in the **Expression Builder** window.
- 5 Close the **VBScript Functions** window.
- 6 Click **Save**.
- 7 Click **OK**.

Naming Fields

EXCHANGEit 4.4 and Above

The notation used for naming fields in VBScript is as follows:

Object.FieldName

For sources, destinations or links with an associated template or table, the notation is as follows:

Object.Table.FieldName.

The “Source” name is taken from the job file's Source Desc. | Description field.

Special Characters/Spaces

If the field name contains special characters or spaces that do not make valid VBS variable names, then write the field name as follows:

Object.Field("Field Name")

Object.Field("Table.Field Name")

EXCHANGEit 4.3 and Below

Prior to EXCHANGEit 4.4, the notation for naming fields in VBScript was as follows:

"Object.FieldName"

For VBScript that was entered in job files in EXCHANGEit 4.3 and below, the "Object.FieldName" notation still applies. If old VBScript is changed in EXCHANGEit 4.4, you are prompted to promote the VBScript to the new field naming convention of Source.FieldName.

Add Properties

Properties can be added to the VBScript for a particular source, destination, or link object. Properties can be accessed and added to the Expression Builder from the Source, Dest., or Link Selection tab.

FieldObjName

Description

This property is only available for fields that conform to VBScript variable naming conventions. For example, fields that start with a letter or contain no spaces.

Syntax

object.FieldObjName

Parameters

Object is a reference to the source, destination, or link.

FieldObjName is a reference to the name of the field.

Add Methods

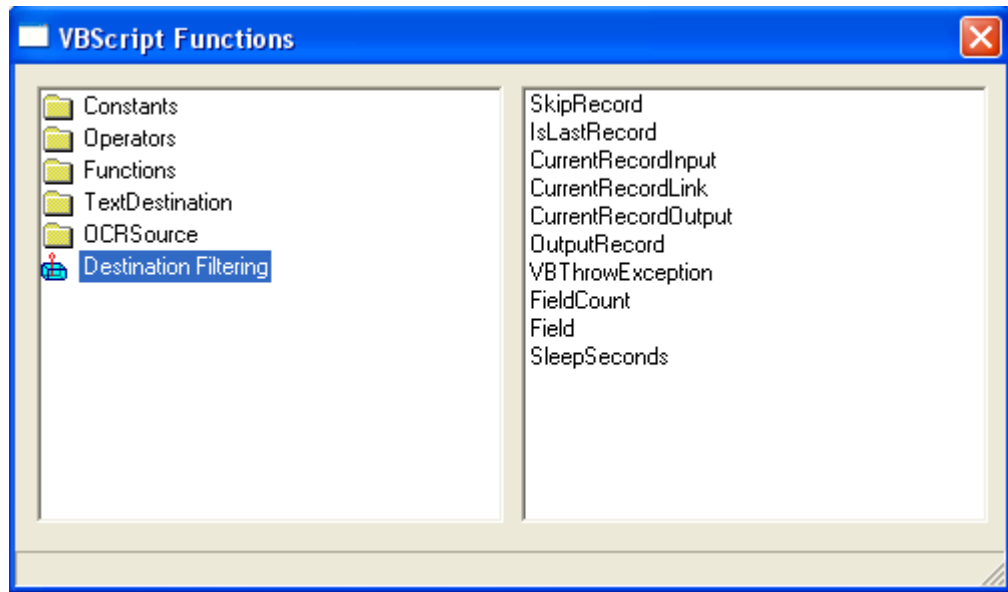
Methods can be added to the VBScript for a particular source, destination, or link object from the Source, Dest., or Link Selection tab. Methods can also be added to the EXCHANGEit object and can be accessed from the Job Scripts tab.

Steps

- 1 From the **Job Scripts** or **Source, Dest., or Link Selection** tab, click **Expression**. The **Expression Builder** window is displayed.
- 2 Click **VBScript Functions**.

Use VBScript

- 3 The **VBScript Functions** window is displayed.
- 4 Double-click **Source Filtering**, **Link Filtering** or **Destination Filtering**.
The available methods are displayed on the right.



- 5 Double-click the method to insert into the expression in the **Expression Builder** window.

AnyDocMessage

Description

This method prevents messages from being displayed when a job is run in the EWS. Messages are still displayed when working in Interactive mode.

Syntax

AnyDocMessage ()

AutoIncr

Description

This method increments the field name passed in.

Syntax

AutoIncr (string fieldName)

ConvertNumFromBase62

Description

This method returns a numeric string (base 10) of the specified base 62 string.

Syntax

```
NumericString = ConvertNumFromBase62(Base62String)
```

ConvertNumToBase62

Description

This method returns a string with the base 62 value of the specified numeric string (base 10).

Syntax

```
Base62String = ConvertNumToBase62 (NumericString )
```

CopySourceFile

Description

This method copies the source input file to the specified Destination path and only applies to file-based sources.

Syntax

```
CopySourceFile(DestinationPath)
```

CurrentRecordInput

Description

This method returns the integer value for the current source record. This method is available for use with the EXCHANGEit object and replaces the CurrentRecord method that was available in version 4.3 and earlier.

Syntax

```
CurrentRecordInput ()
```

CurrentRecordLink

Description

This method returns the integer value of the current link record from the set that is returned for the CurrentRecordInput. For example, if each lookup returns one link record, then the CurrentRecordLink for the third input record is one, not three.

This method is available for use with the EXCHANGEit object. Since multiple links can be configured, this method will only return the count coming from the current link. To have the record count be determined by a previous link, store the value in a Global script.

Syntax

```
CurrentRecordLink()
```

CurrentRecordOutput

Description

This method returns the unique number of records currently output. This number could be different from the total record count due to the SkipRecord and OutputRecord methods.

Syntax

```
CurrentRecordOutput()
```

FetchFieldValue

Description

This method returns the value being retrieved. This method is only available for use with the EDI destination.

Syntax

```
FetchFieldValue (Field)
```

Parameters

Field is a reference to the name of the field to store the value of.

Field (#).Name

Description

This method returns the name of the specified field number.

Syntax

object.Field(#).Name (Boolean)

Parameters

Object is a reference to the source, destination, or link.

Field(#) is a reference to the field number.

The Boolean parameter should be True to return the fully qualified name.

Field (# | "name")**Description**

This method returns the field value by the specified number or long name. The long name includes spaces.

Syntax

object.Field(#)

object.Field("name")

Parameters

Object is a reference to the source, destination, or link.

Field(#) is a reference to the field number.

Field(name) is a reference to the field name.

Field Count**Description**

This method returns the number of fields for the given source, link, or destination.

Syntax

object.FieldCount()

Parameters

Object is a reference to the source, destination, or link.

GetPrevFieldValue**Description**

This method returns the previous value of the field name passed in.

Syntax

Use VBScript

GetPrevFieldValue (string fieldName)

GetSourceFilePath

Description

Read only. This method returns the file path of the .GTO or .TXT input file.

Syntax

```
object.GetSourceFilePath
```

Parameters

Object is a reference to the source, destination, or link.

GetSourceFilePath is a reference to the name of the field.

GetSourceMoveProcessedImagePath

Description

This method returns the source archive image folder and only applies to OCR for AnyDoc, .GTO and .XML source files.

Syntax

```
ArchiveImageFolder = GetSourceMoveProcessedImagePath()
```

IsLastRecord

Description

This method returns True if the current record is the last record in the input stream. The functionality provided by using this method can also be achieved by using Global CleanUp, Project Trailer, and File Trailer scripts.

Syntax

```
IsLastRecord()
```

IsLastRecordInputFile

Description

This method returns True if the current record is the last record in the current input file.

Syntax

```
IsLastRecordInputFile()
```


OutputRecord

Description

This method returns True if the record is output or False if the record is not output. This method outputs the current field values for a destination and allows for the output of multiple records to a destination for each input record. This can only be called from a destination object and is output prior to the usual destination record output.

Syntax

OutputRecord()

PrevValue

Description

This method returns the previous field value. If there is no previous value it returns an empty string.

Syntax

object.FieldObjName.PrevValue()

Parameters

Object is a reference to the source, destination, or link.

FieldObjName is a reference to the name of the field.

SetDestinationFilePath

Description

This method overrides the destination file path that is specified in the .TXT or .EDI job file.

Syntax

object.SetDestinationFilePath

SetDestinationFileName

Description

This method overrides the file name that is specified in the .TXT or .EDI job file.

Syntax

Use VBScript

```
object.SetDestinationFileName
```

SetSourceMoveProcessedFilePath

Description

This method overrides the file path that is specified on the source .TXT, .GTO, and .XML Transform job option tab which is used to move files.

Syntax

```
object.SetSourceMoveProcessedFilePath
```

SetSourceMoveProcessedImagePath

Description

This method overrides the image path that is specified in the source OCR for AnyDoc .GTO Options tab which is used to move files.

Syntax

```
object.SetSourceMoveProcessedImagePath
```

SkipRecord

Description

This method returns True if the current record is skipped. This function should only be used once as only the last call is acknowledged.

Syntax

```
SkipRecord(Boolean)
```

Parameters

Boolean is a reference to the value returned, which can be True or False.

StoreFieldValue

Description

This method returns the value being stored. This method is only available for use with the EDI destination.

Syntax

```
StoreFieldValue (Field, Value)
```

Parameters

Field is a reference to the name of the field to store the value of.

Value is a reference to the value to store.

TokenCount

Description

This method returns multiple integer values separated by white spaces. This allows the Multiple Records Per Image option to be turned off on the Source Options tab and still access individual values.

Syntax

```
object.FieldObjName.TokenCount()
```

Parameters

Object is a reference to the source, destination, or link.

FieldObjName is a reference to the name of the field.

Token

Description

This method returns the token values that are separated by white space.

Syntax

```
object.FieldObjName.Token (n)
```

Parameters

Object is a reference to the source, destination, or link.

FieldObjName is a reference to the name of the field.

(n) is a reference to the number of the token in the string that is to be returned.

VBThrowException

Description

This method returns a message that is associated with the exception. An EXCHANGEit exception record is created and the current record is not output. This method can only be called in a destination expression.

Syntax

```
VBThrowException(Message)
```

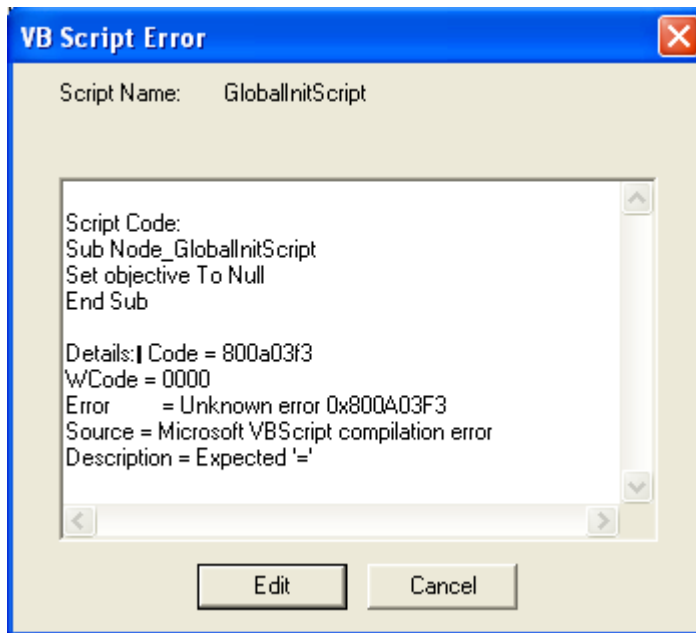
Parameters

Use VBScript

Message is a reference to the message that is used in the exception record.

Edit VBScript Errors

The VBScript Error window displays errors that are encountered when running a job. The job is stopped and information regarding the error and its location are displayed for your reference so you can locate the incorrect script and modify it in the Expression Builder window. For more information about the Expression Builder, see [Use the Expression Builder](#) (page [314](#)).



Steps

- 1 On the **VBsCript Error** window, click **Edit**.
The **Expression Builder** window is displayed.
- 2 Edit the code as necessary.
- 3 Click **OK**.

VBScript Examples

This section provides realistic examples of VBScript to illustrate how to integrate VBScript into your EXCHANGEit projects. The example begins with a simple procedure and gradually includes functions, dynamically created fields and variables. When you see "YourDatabase.YourTable.YourField", you can assume that the referenced field is located in a relational database.

Running a test job triggers the scripts created in EXCHANGEit, except for those scripts in EDI.

Inventory Check

The following expression processes any item that contains a value of five or less in a particular database.

```
'This lets us check our low units  
SkipRecord (YourDatabase.YourTable.YourField> 5)
```

The first line in the expression is a comment. Comments are used to describe the task an expression performs. The expression follows the comment. The first statement, YourDatabase.YourTable.YourField, is the collection of fields to be filtered. SkipRecord is the method used to exclude certain records.

SkipRecord is a method, not a function. SkipRecord performs an action, but is from the EXCHANGEit object model, not VBScript.

Add the Inventory Check Procedure to an EXCHANGEit Project

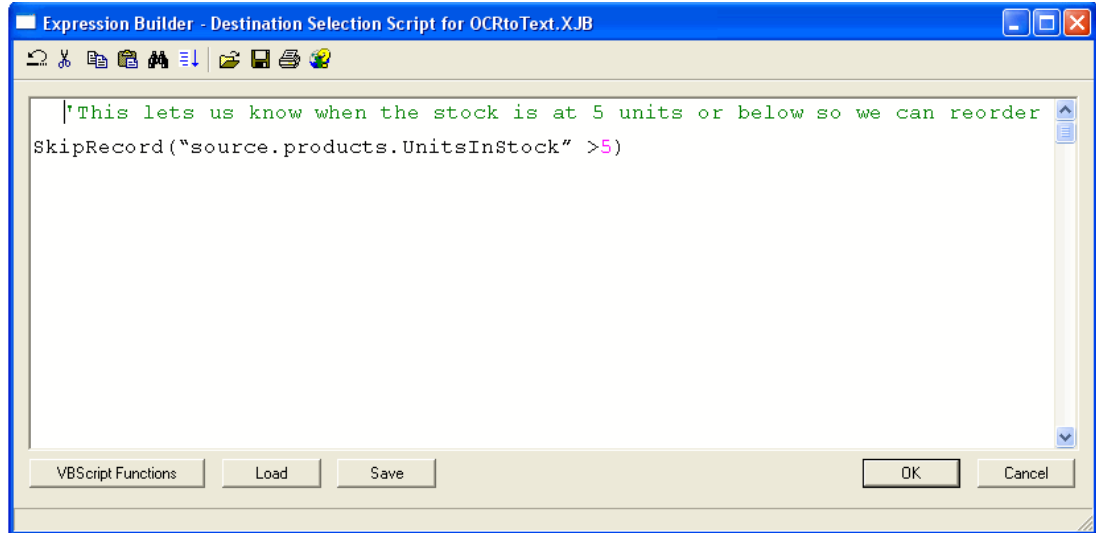
Steps

- 1 Configure a source or link. This is not available with new fields.
- 2 Click the **Expression** button on the **Source Selections** tab. The Expression Builder window is displayed.
- 3 In the **Code Entry** pane, place the cursor in the location to add the field name within the expression.
- 4 Enter the field name code in the **Code Entry** pane
OR
Select a field name from the **Source** folder. See Use Field Names (page [318](#)).
- 5 Enter the following in the **Code Entry** pane:

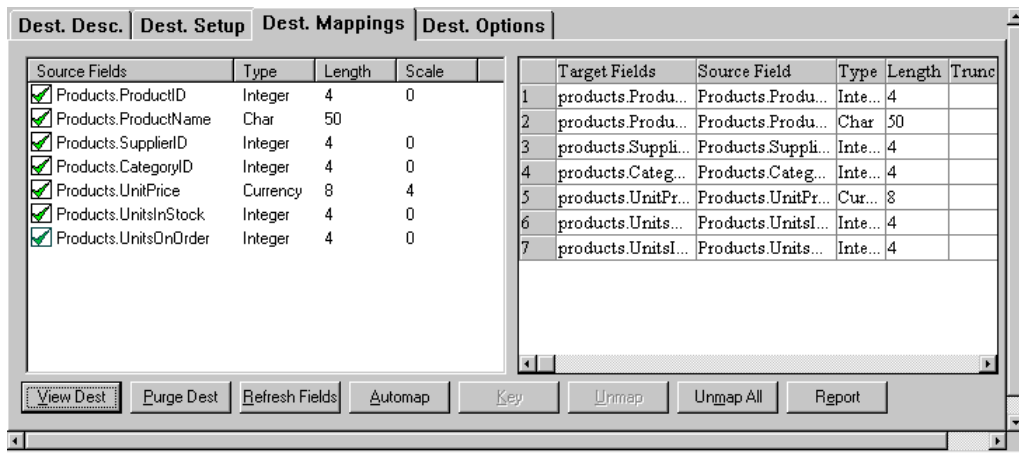
Use VBScript



'This lets us know when the stock is at 5 units or below so we can reorder

SkipRecord("source.products.UnitsInStock" >5)

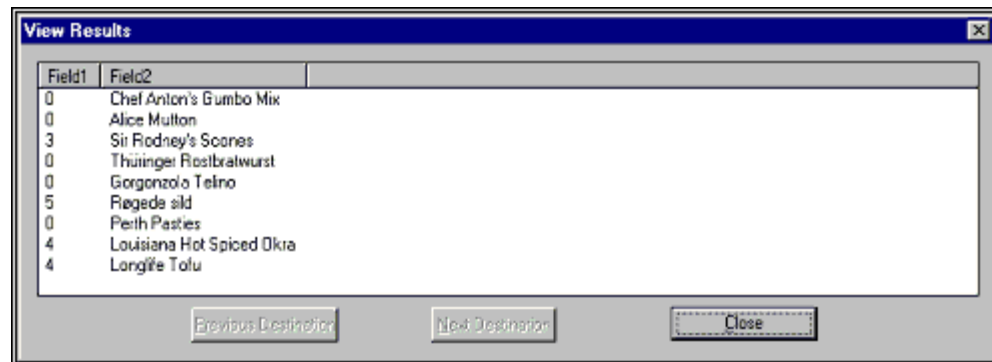


- 6 Click **OK**.
- 7 Click **Apply** on the **Source Selections** tab and save your project. If Apply is not clicked, the code is saved, but not run.
- 8 Configure a destination, mapping the appropriate fields as necessary. At a minimum, map the field being manipulated and one other field that contains an item name and/or identification number.



- 9 Click the **Test Job** button, . The View Results window is displayed.
- 10 Click the **Run Job** button, . A window appears stating that the destination is permanently updated by running the job.

- 11 Click **Yes**. The View Results window displays the job results.



This example shows a portion of the original file before applying VBScript (with one of the filtered records marked).

products ProductID	products ProductName	products SupplierID	products CategoryID	products...	products...	products UnitsInStock
1	Chai	1	1	10 box...	18.0000	39
2	Chang	1	1	24 - 12 ...	19.0000	17
3	Aniseed Syrup	1	2	12 - 55...	10.0000	13
4	Chef Anton's Cajun Seasoning	2	2	48 - 6 o...	22.0000	53
5	Chef Anton's Gumbo Mix	2	2	36 boxes	21.3500	0
6	Grandma's Boysenberry Spread	3	2	12 - 8 o...	25.0000	120
7	Uncle Bob's Organic Dried Pears	3	7	12 - 1 L...	30.0000	15
8	Northwoods Cranberry Sauce	3	2	12 - 12 ...	40.0000	6
9	Mishi Kobe Niku	4	6	18 - 50...	97.0000	29
10	Ikura	4	8	12 - 20...	31.0000	31
11	Queso Cabrales	5	4	1 kg pkg.	21.0000	22
12	Queso Manchego La Pastora	5	4	10 - 50...	38.0000	86
13	Konbu	6	8	2 kg box	6.0000	24
14	Tofu	6	7	40 - 10...	23.2500	35

Filtered
Record

You can also arrange the order in which the fields appear. For example, for the product names to precede the inventory results, map the **ProductName** field first, followed by the **UnitsInStock** field.

Add Characters

This example uses one function and a dynamically created field to update a field in a particular database. A zero is being added to a blank field.

'This places a "0" in a previously blank field.

```
If (Trim(YourDatabase>YourTable>YourField) = "") Then
```

```
    NewField = "0"
```

```
Else
```



```
    NewField = YourDatabase>YourTable>YourField
```

```
End If
```

Add Characters to a Database Field

Steps

Use VBScript

- 1 Configure a source (page [349](#)).
- 2 Configure a new field (page [268](#)).
- 3 Configure a destination (page [355](#)).
- 4 Map the new field that appears in the left pane of the Dest. Mappings tab to the appropriate field in the right pane.
- 5 Click the **Test Job** button, , and verify the output. The View Results window is displayed.
- 6 Click the **Run Job** button, . The View Results window displays the results of the job.

Use Math

This example uses multiple functions and a dynamically created field to multiply the values of two fields in a specific database. The result is stored in a different field in the source database. The CCur and CInt functions are used to convert existing data in database fields into a currency format and an integer format.

```
'This converts the formats and multiplies the values of two fields.
```

```
DifferentField = CCur(YourDatabase.YourTable.UnitPrice) *  
CInt(YourDatabase.YourTable.UnitsInStock)
```

It is recommended that the “DifferentField” is created in the source database table to contain the results of this expression before creating the project in EXCHANGEit.

- 1 Configure a source (page [349](#)).
- 2 Configure a new field (page [268](#)) and enter the appropriate code in the Expression Builder window.
- 3 Configure a destination (page [355](#)).

Combine Data from Two Fields

This example uses a function, a dynamically created field and a variable to combine the data of two fields in a database.

```
'This takes the first character from the FirstName field and  
combines it with the contents of the LastName field.
```

```
NewField = Left(YourDatabase.YourTable.YourFirstName, 1) +  
YourDatabase.YourTable.YourLastName
```


The ASCII value of the first character of the FirstName field, whatever it may be, is stored in Name. The Left function selects the expression to start at the left most character of the FirstName field and the “1” dictates how many characters should be selected. The first character of the FirstName field and all the characters in the last name field are stored in Name again, which, are then stored in a new field in the destination.

Convert a Date Format

This example uses multiple functions, multiple variables and a dynamically created field to convert the date format of a database field from YYMMDD to 19YYMMDD.

```
'This adds "19" to two digit year dates.
DateIn = YourDatabase.YourTable.OrderDate
If (Int(Left(DateIn,2))<50 Then
    Ccyy="20" & Left(DateIn,2)
Else
    Ccyy"19" & Left(DateIn,2)
EndIf
Mm = Mid(DateIn, 3, 2)
Dd = Right(DateIn, 2)
"NewField" = ccyy & mm & dd
```

To convert a two digit year format to a Y2K-compliant format:

- ☐ Configure a source (page [349](#)).
- ☐ Configure a new field (page [268](#)).
- ☐ Configure a destination (page [355](#)).

The destination should be the same as the source because the source field is updated.

Create a Destination Using VBScript


For more flexibility, a destination can be created via code. Rather than map the fields, include them in a “Write” statement. In this example, a text file (testfile.txt) is used as a destination; the source is a database table with a table called “YourTable” and a field called “YourField.”

Steps

- 1 Configure a source (page [349](#)).
- 2 On the **Source Selections** tab, click **Expression**.

The **Expression Builder** window is displayed.

- 3 Enter the following code in the **Code Entry** pane:

```
Set fs = CreateObject("Scripting.FileSystemObject")  
Set a = fs.OpenTextFile("c:\testfile.txt", 8, True)  
a. Write("Source.YourTable.YourField" & vbCrLf)  
a. Close
```
- 4 Click **OK**.
The **Source Selections** tab is displayed.
- 5 Click **Apply**.
- 6 Click the **Run Job** button, .
- 7 Minimize EXCHANGEit and navigate to C:\testfile.txt. One column of information appears in the text file. When testing or running the job with a destination configured through the user interface, no results appear in the View Results window.

Correct Addresses in EXCHANGEit

This example shows how to validate address data using VBScript and AccuZip. AccuZip is a database that is installed on the network and validates and formats addresses according to USPS Publication 28.



AccuZip must be installed to follow this example. To verify that AccuZip is installed, select **Preferences | Directories | AccuZip Info**. If a “Full Database” message appears, AccuZip is available. If an “Error connecting to database” message displays, AccuZip must be installed and configured.

This example assumes the source and destination contain address, city, state and zip code fields. Create a new field, “Clean.” The first four lines of the code feed the address information to the AccuZip engine for validation; the next lines return the cleaned data. This example also assumes that the destination contains a field, “Clean,” in which “Good” or “Bad” appears based on the results of the AccuZip engine. Map address, city, state, zip code and clean fields in the destination.

- 1 Configure a source (page [349](#)).
- 2 Configure a new field (page [268](#)) (named Clean).
- 3 Add the following code:

```
Accuzip.AddressField = Source.FieldAddress  
Accuzip.CityField = Source.FieldCity  
Accuzip.StateField = Source.FieldState  
Accuzip.ZipField = Source.FieldZip
```

```
If Accuzip.Process = True Then
    Link.Clean= "Good"
    Source.FieldAddress = Accuzip.AddressField
    Source.FieldCity = Accuzip.CityField
    Source.FieldState = Accuzip.StateField
    Source.FieldZip = Accuzip.ZipField
Else
    Link.Clean = "Bad"
End If
```

- 4 Click **OK**.
- 5 Configure a destination (page [355](#)).
- 6 Map the **Address, City, State, Zip Code** and **Clean** fields in the Dest Mappings tab from source to destination.
- 7 Click the **Test Job** button, , to test the job.
- 8 Click the **Run Job** button, , to run the job. The View Results window displays the job results.

Chapter 12

Troubleshooting

This section provides solutions for common problems and errors that users might encounter.

Hyland OnBase Client

Error

OnBase Client (OBServer) is not responding.

Description

This error might be displayed when trying to run an EXCHANGEit job using a Hyland Onbase database as the destination. This issue is usually the result of a large database in which the statistics are not being updated.

Solution

Perform maintenance on the database and update the statistics for the database.

ODBC DSN Is Not Displayed

Error

A previously configured ODBC DSN is not displayed in EXCHANGEit.

Description

EXCHANGEit is a 32-bit application and therefore, uses the 32-bit ODBC Data Sources. However, the 64-bit ODBC Data Source Administrator is run by default on 64-bit systems.

Solution

Configure the DSN in the 32-bit ODBC Data Source Administrator from within EXCHANGEit. From the Management menu, click Configure 32-bit ODBC Data Sources.

If the ODBC Data Source Administrator is accessed outside of EXCHANGEit ensure the 32-bit version is run.

Chapter 13

Integrating with Other AnyDoc Products

OCR for AnyDoc and EXCHANGEit Integration

OCR for AnyDoc provides the ability to run a specific EXCHANGEit project whenever a batch is committed for a form family.

Exceptions can be corrected and processed using the <ei Exceptions phase in OCR for AnyDoc without having to reprocess the entire job. For more information about the EXCHANGEit Exceptions phase, see EXCHANGEit Exceptions Phase (page [341](#)).

Processing exceptions in OCR for AnyDoc requires the following:

- A minimum of EXCHANGEit version 5.1.15 and OCR for AnyDoc version 13.0.1 are required to be installed on the OCR for AnyDoc station that is processing the exceptions.
- In EXCHANGEit, the following options must be set on the Directory and Computer Settings window (page [16](#)):
 - A valid OCR Control Path must be specified.
 - The Move/Store Exceptions in the OCR Control Path check box must be selected.
 - The specified EXCHANGEit Job File Directory must be on a network location which the OCR for AnyDoc station must have access to.
- In OCR for AnyDoc, the applicable EXCHANGEit Integration settings must be set on the Directory/Output Settings | Commit Options Tab.
- Installation requirements for all EXCHANGEit destinations used in the EXCHANGEit job are still valid.



For example, if the EXCHANGEit job updates an ODBC database, then the DSN must be defined on the OCR for AnyDoc station that is processing the exceptions. If the destination requires any additional client software, it must also be installed on the OCR for AnyDoc stations that is processing the exceptions.

EXCHANGEit Server Installation and Configuration

The EXCHANGEit server setup is required to run EXCHANGEit projects (.XJB files) from OCR for AnyDoc as part of the Commit phase.

- ☐ Select a Windows XP/Server 2003 SP2 server to host the EXCHANGEit server.
- ☐ Install EXCHANGEit. No other options are necessary.
- ☐ Note the IP address of the server machine. The IP address must be provided to the OCR for AnyDoc form family administrator.
- ☐ Configure DCOM for the EXCHANGEit server. For more information, see DCOM Configuration (page [344](#)).

Set Up EXCHANGEit

- 1 Set up EXCHANGEit as a standalone station without OCR for AnyDoc.
- 2 From the **Source Setup** tab, configure a .GTO file or a directory where all .GTO files are processed.
- 3 Click the **Test Job** button, , to test the job
OR
Select **Job | Test Run**. If the data in the View Results window is correct, then the source is set up properly.
- 4 Click the **Run Job** button, ,
OR
Select **Job | Production Run**. Verify that the data moves to the destination.

Process OCR for AnyDoc Exceptions

Errors or "exceptions" that occur when running an EXCHANGEit job from within OCR for AnyDoc can be corrected from within OCR for AnyDoc. The EXCHANGEit Exceptions phase provides the option to edit incorrect data and reprocess the data without having to reprocess the entire job.

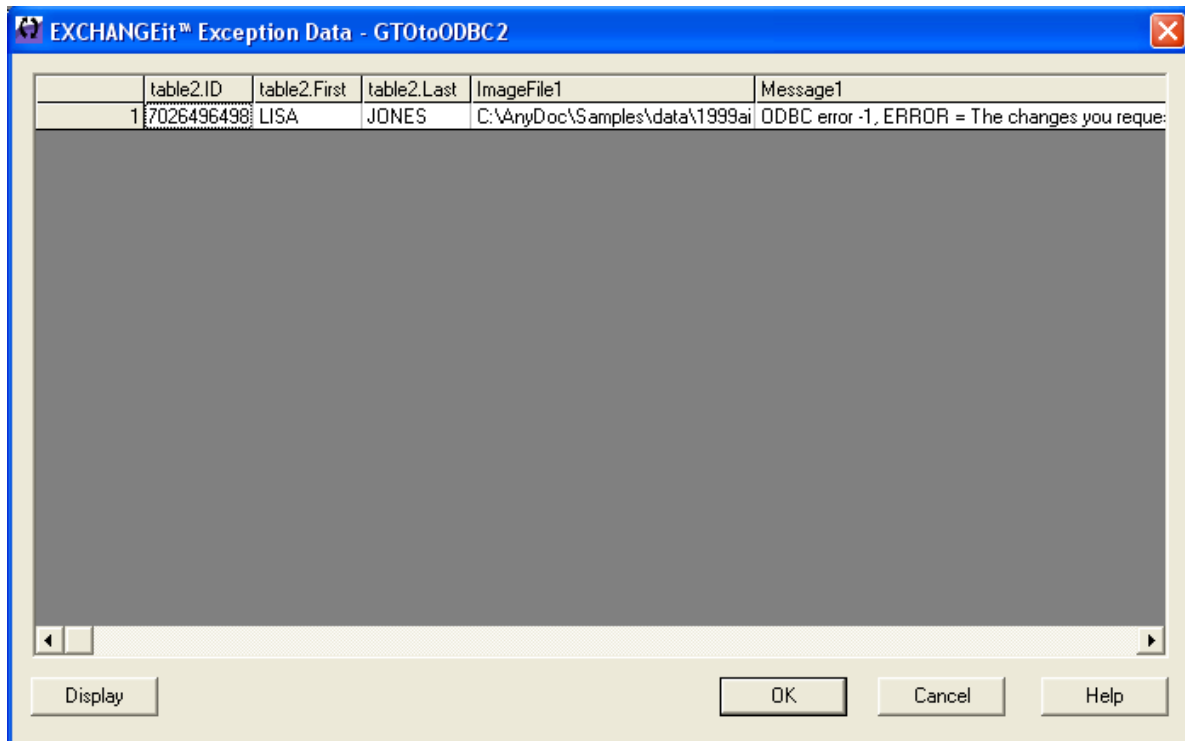
This phase is available on all OCR for AnyDoc interactive stations if a valid OCR Control Path is specified and the Move/Store Exceptions in the OCR Control Path check box is selected in EXCHANGEit. For more information about additional requirements for implementing a complete integration between OCR for AnyDoc and EXCHANGEit, see OCR for AnyDoc and EXCHANGEit Integration (page [340](#)).

Integrating with Other AnyDoc Products

Errors can be corrected and the EXCHANGEit job can be reprocessed from the following windows:

- **EXCHANGEit Exception Data**

If it is not necessary to view the image containing the errors, correct the fields directly from the **EXCHANGEit Exception Data** window. When all fields have been corrected, right-click in the **Exception Data** window and select **Reprocess**.



- **Exception Record**

To view both the error and the image, select a row in the **EXCHANGEit Exception Data** window and click **Display**.

The **Exception Record** window displays the image containing the incorrect field values. Additionally, the Exception Record window provides the ability to zoom up and down the image using the Zoom Down and Zoom Up buttons or the sliding toolbar to get a closer look at the fields. When all fields have been corrected, click **Reprocess**.

Exception Record

Error Message:
 ODBC error -1, ERROR = The changes you requested to the table were not successful because they would create duplicate values in the index, primary key, or relationship. Change the data in the field or fields that contain duplicate data, remove the index, or redefine the index to permit duplicate entries and try again.
 State:23000,Native:-1605,Origin:[Microsoft][ODBC Microsoft Access Driver] - Extra Information = ID=7026496498 First=LISA Last=JONES

Name	Value
table2.ID	7026496498
table2.First	LISA
table2.Last	JONES

1999
AIM International **microsystems technology** Microsystems Technology, Inc.
 Information Capture Software 401 E. Jackson Street
 Tampa, FL 33607

First Name: LISA M.I. Last Name: JONES
 Company: KEYWORD PROCESSING SOLUTIONS Phone: 702-488-4488
 Street Address: 1001 BROADWAY Fax: 702-488-4488
 City: LAS VEGAS NV State: NV Zip+4: 89101-1111
 Province: Country: USA Postal Code:
 International Phone: International Fax:

What best describes your company's business?
☐ Government ☐ Manufacturing
☐ Health Care ☐ Law Enforcement
☐ Financial ☐ Retail
☒ Service Business ☐ Tele Comm / Utilities
☐ Education ☐ Insurance
☐ Other

What best describes your discipline?
☒ End User ☐ VAR
☐ Integrator ☐ Software Vendor

How many people within your company are responsible for entering data from forms?
☐ 1-9 ☐ 10-24 ☐ 25-49 ☐ 50-99 ☒ 100+

What types of forms do these people key in?
 All types

What types of forms would you like to see Web enabled?
 None

Do you use any type of internal e-form? If so, what type of forms?
 Times Card

Who else within your organization would be interested in this type of technology?
 Operations Manager

Zoom Up
 Zoom Down

Reprocess Previous Next Close Help

If the job was reprocessed successfully, errors are removed from the Exception Data window.



If you are processing exceptions for multiple jobs in a single form family, all exceptions for all jobs are processed at the same time.

Integrating with Other AnyDoc Products

After reprocessing, the Exception Handler Statistics window displays to provide statistics polled from the reprocessed job, such as how long each record took to correct, how many records successfully reprocessed and how many records failed to reprocess.



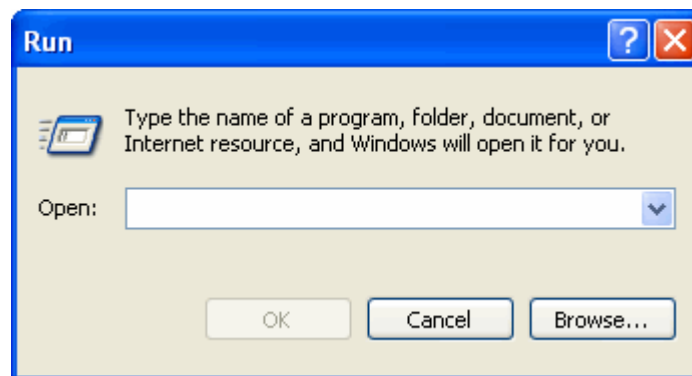
DCOM Configuration

Configuring DCOM is performed on the server. Instructions for configuring DCOM are provided for both Windows 2000 and XP operating systems.

Steps

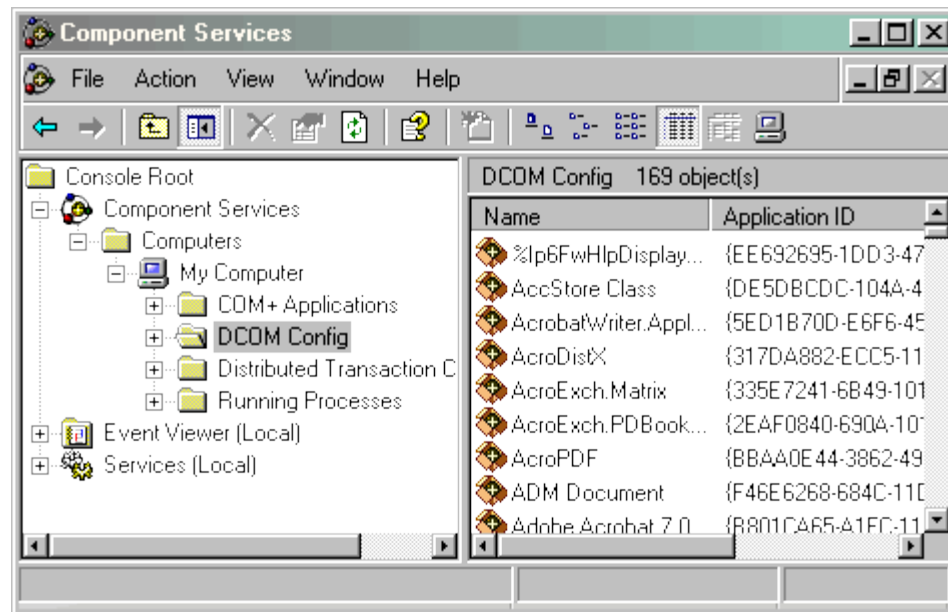
1 Do one of the following:

- For Windows 2000, click **Start | Run** and in the Open field, enter **dcomcnfg** and click **OK**.



- For Windows XP, click **Console Root | Component Services | Computers | My Computer | DCOM Config**. The Distributed COM Configuration

Properties window displays all COM components installed on the computer.



- 2 Right-click **AnyDoc EXCHANGEit Document** and select **Properties**.
The **AnyDoc EXCHANGEit Document Properties** window is displayed.
- 3 On the **General** tab, set **Authentication Level** to **Default**.
- 4 Click the **Location** tab.
- 5 Select **Run application on this computer**.
- 6 Click the **Security** tab.
- 7 Under the **Access Permissions** section, select the customization option.
- 8 Click **Edit** to configure the custom access permissions, as needed. Ensure that all users that need access are added to the **Access Permissions** list.



At a minimum, OCR for AnyDoc users that either access Form Family Management or run the Commit phase of batch processing must be added to the Access Permissions list.

- 9 Under the **Launch and Activation Permissions** section, select the customize option.
- 10 Click **Edit** to configure the launch permissions, as needed. Ensure that all users that need access are added to the Launch Permissions list.
- 11 Click the **Identity** tab.
- 12 Configure the account for the user that runs the component on the server. The user must be configured so able to start processes and access the necessary resources.

13 Click **OK** when DCOM configuration is complete.

Troubleshoot the DCOM Interface

Sympton	Possible Problem	Recommended Action
The EXCHANGEit project does not appear in OCR for AnyDoc's Select EXCHANGEit window.	The Job File Directory is pointing to a directory other than where the EXCHANGEit project has been set up.	Ensure that the correct project folder is set up in EXCHANGEit under Preferences Directories Job File Directory .
Problems running the EXCHANGEit project.	Various causes.	Contact AnyDoc Software Technical Support. Send the project (.XJB file), any source files (.GTO files), History Database information (see Identify Errors through the History Database (page 297)), and a trace file (see Trace Transactions (page 11)).

CAPTUREit and EXCHANGEit Integration

EXCHANGEit can post messages to the CAPTUREit station that has scanned the batch being processed. These messages confirm that the transfer to EXCHANGEit is complete.

For this to work:

- CAPTUREit 3.0.5 or greater must be installed.
- OCR for AnyDoc 5.0.1 or greater must be installed.

EXCHANGEit must be configured to point to the OCR for AnyDoc Control Path where the executable resides.

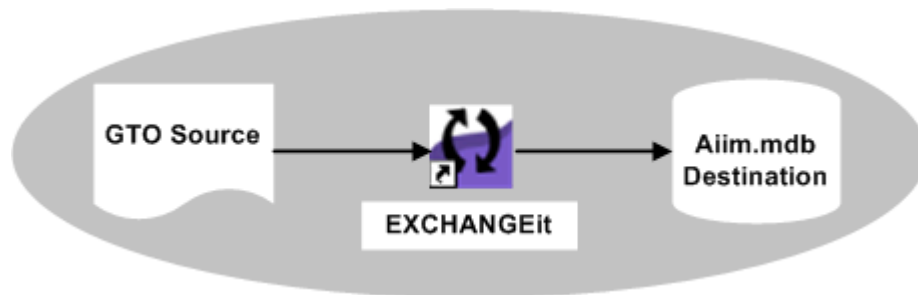
For more information, see the "System Configuration | CAPTUREit Server Tab" topic in the OCR for AnyDoc online help.

Chapter 14

Tutorial

This tutorial is designed to get you started using EXCHANGEit. You will be guided through the setup of a source and destination in a simple project and then run the job in production mode. The source file for the tutorial is a Generic Text Output file (.GTO file) and the destination file is an Access database (.MDB). When the tutorial is complete, the data contained in the .GTO file is transferred to the Access database.

The tutorial requires two sample files, 00000075.gto and aiim.mdb. These files are provided for you when EXCHANGEit is installed and are located in the EXCHANGEit installation directory. The installation directory is generally located under Program Files\AnyDoc Software\EXCHANGEit 13.4.



Files You Need to Complete the Tutorial

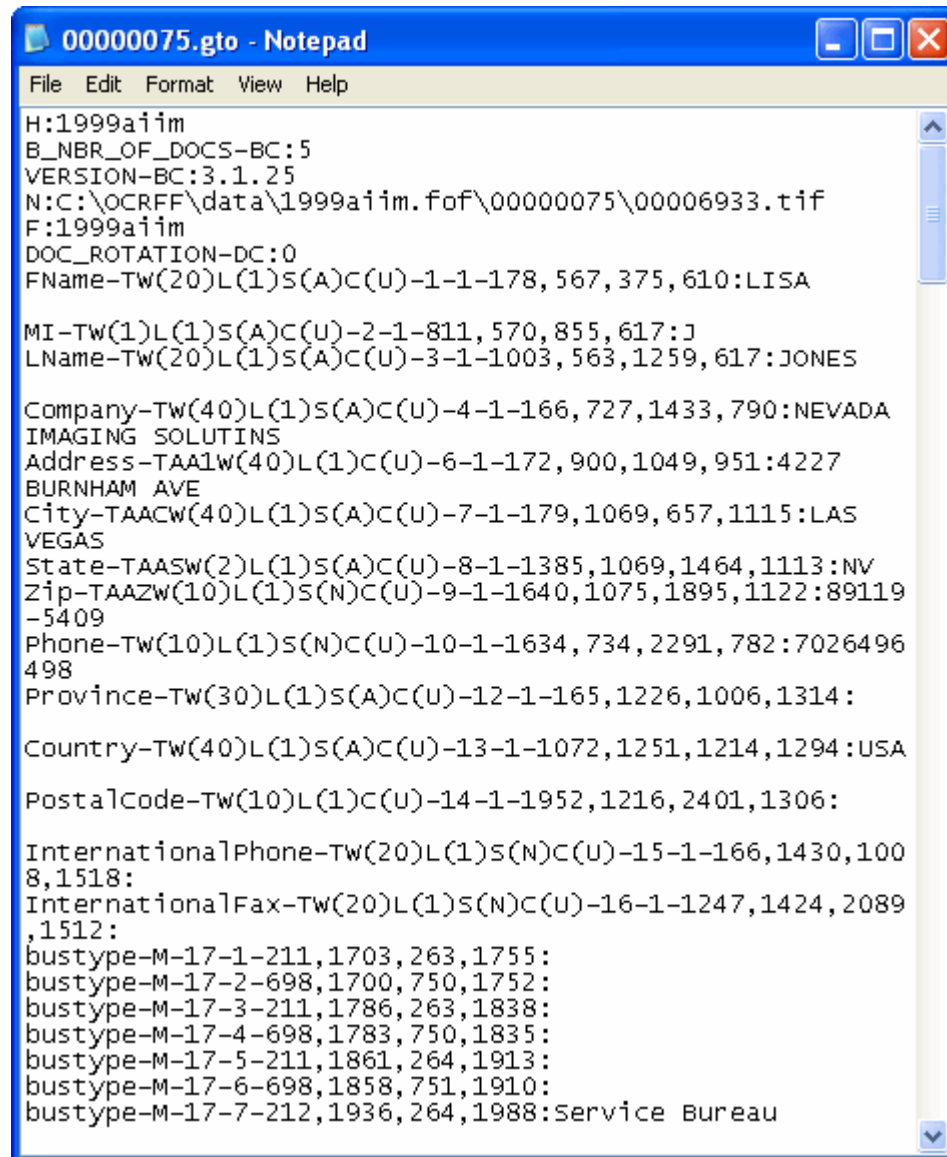
You need two files to complete this tutorial:

- 00000075.gto (source)
- aiim.mdb (destination)

These files were provided at installation and are located in the EXCHANGEit installation directory.

Source File

The first tutorial file, 00000075.gto, functions as the source. It contains fictitious information processed from an AIIM conference registration form. It includes names, full addresses and company information. This file was created using AnyDoc Software's forms processing software application, OCR for AnyDoc.



```
00000075.gto - Notepad
File Edit Format View Help
H:1999aiim
B_NBR_OF_DOCS-BC:5
VERSION-BC:3.1.25
N:C:\OCRFF\data\1999aiim.fof\00000075\00006933.tif
F:1999aiim
DOC_ROTATION-DC:0
FName-Tw(20)L(1)S(A)C(U)-1-1-178,567,375,610:LISA

MI-Tw(1)L(1)S(A)C(U)-2-1-811,570,855,617:J
LName-Tw(20)L(1)S(A)C(U)-3-1-1003,563,1259,617:JONES

Company-Tw(40)L(1)S(A)C(U)-4-1-166,727,1433,790:NEVADA
IMAGING SOLUTIONS
Address-TAA1w(40)L(1)C(U)-6-1-172,900,1049,951:4227
BURNHAM AVE
City-TAACW(40)L(1)S(A)C(U)-7-1-179,1069,657,1115:LAS
VEGAS
State-TAASw(2)L(1)S(A)C(U)-8-1-1385,1069,1464,1113:NV
Zip-TAAZw(10)L(1)S(N)C(U)-9-1-1640,1075,1895,1122:89119
-5409
Phone-Tw(10)L(1)S(N)C(U)-10-1-1634,734,2291,782:7026496
498
Province-Tw(30)L(1)S(A)C(U)-12-1-165,1226,1006,1314:

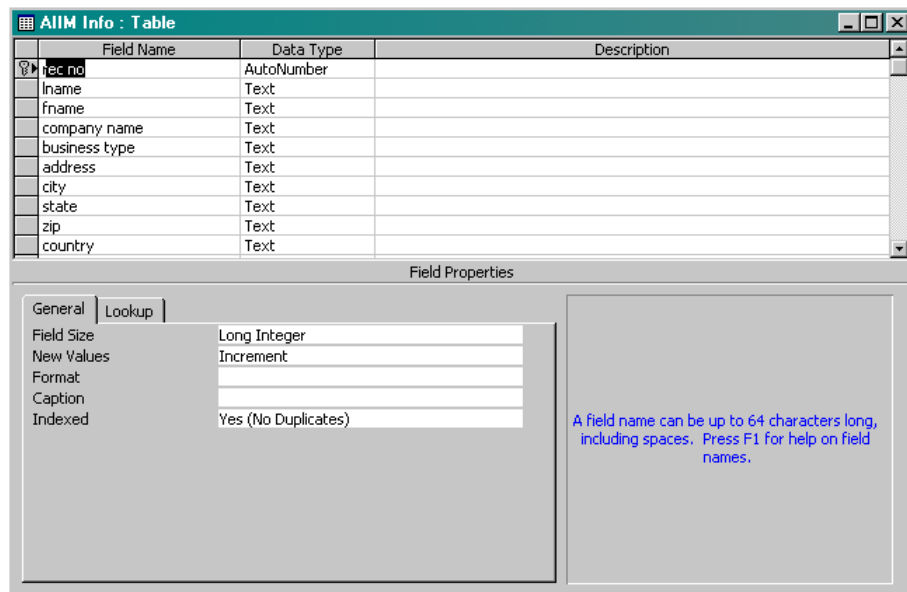
Country-Tw(40)L(1)S(A)C(U)-13-1-1072,1251,1214,1294:USA

PostalCode-Tw(10)L(1)C(U)-14-1-1952,1216,2401,1306:

InternationalPhone-Tw(20)L(1)S(N)C(U)-15-1-166,1430,100
8,1518:
InternationalFax-Tw(20)L(1)S(N)C(U)-16-1-1247,1424,2089
,1512:
bustype-M-17-1-211,1703,263,1755:
bustype-M-17-2-698,1700,750,1752:
bustype-M-17-3-211,1786,263,1838:
bustype-M-17-4-698,1783,750,1835:
bustype-M-17-5-211,1861,264,1913:
bustype-M-17-6-698,1858,751,1910:
bustype-M-17-7-212,1936,264,1988:Service Bureau
```

Destination File

The second file, `aiim.mdb`, functions as the destination. It contains a series of fields: `rec number`, `l(ast) name`, `f(irst) name`, `company name`, `business type`, `address`, `city`, `state`, `zip`, `country` and `phone`. These fields appear in the `AIIM` table in the Access Design View.



The tutorial shows you how to move the information in the `00000075.gto` into the `aiim.mdb` data table by using EXCHANGEit.


You are going to transfer information collected from an information form to your contact management system, which is an Access database. You have used OCR for AnyDoc to read the form, thereby minimizing the data entry process. OCR for AnyDoc translates the information from your forms into a `.GTO` file. Now you want to move the information into your Access database. The steps are:

- ☐ Configure a History Database. For more information, see History Database (page [293](#)).
- ☐ Configure a source.
- ☐ Configure a destination.
- ☐ Move information from source to destination.

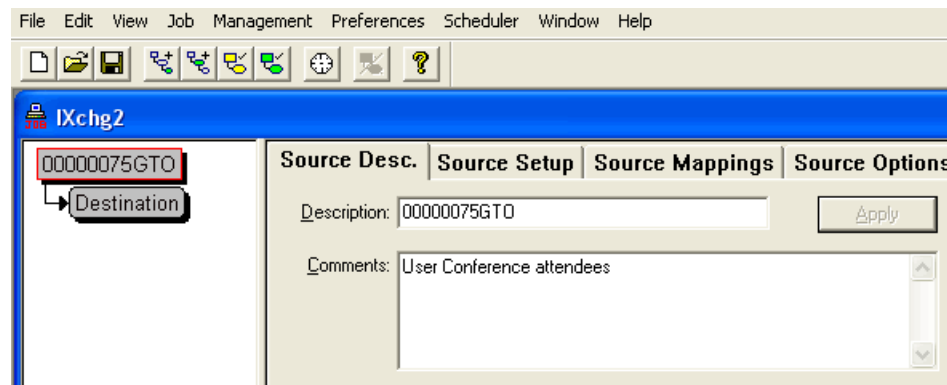
Configure a Source

The first step in any EXCHANGEit project is to configure the source, which contains information to be moved to the destination. This source may be a data file, a database, or some other format.

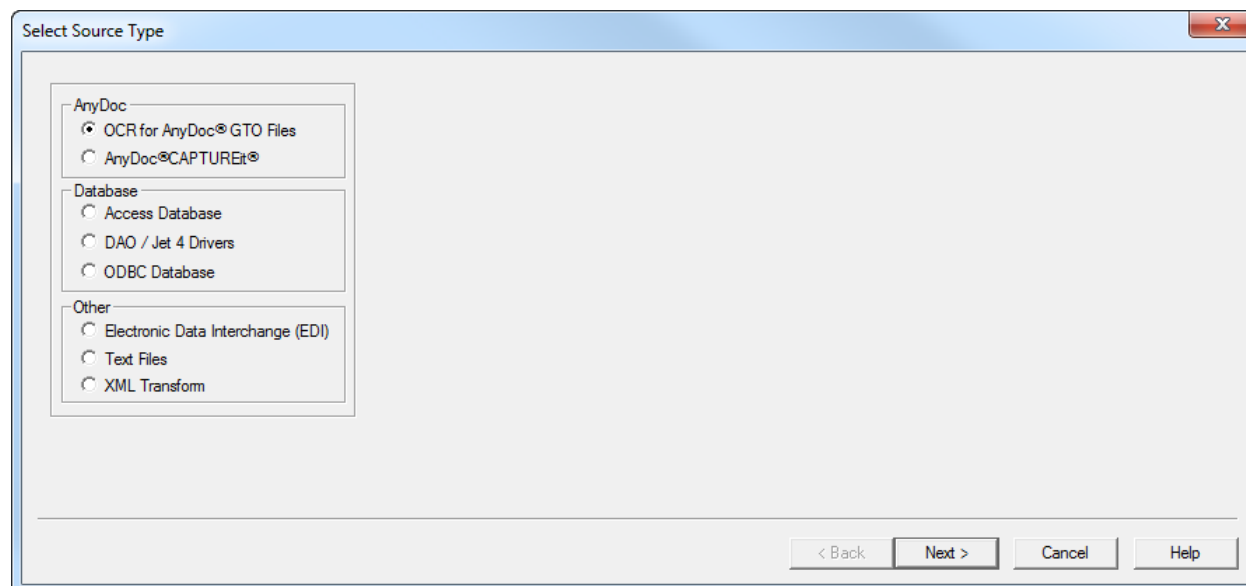
Tutorial

- 1 Select **File | New** or click the **New** button, . The IXchg1 window appears with the Source Desc. tab displayed.
- 2 Enter 00000075GTO in the **Description** field, and enter a brief description of the project in the **Comments** field. The description needs to identify the nature of the file so you can easily identify it within a long list of files.
- 3 Click **Apply**.

The source name, 00000075GTO, is displayed on the source flowchart symbol (node) on the left side of the window.

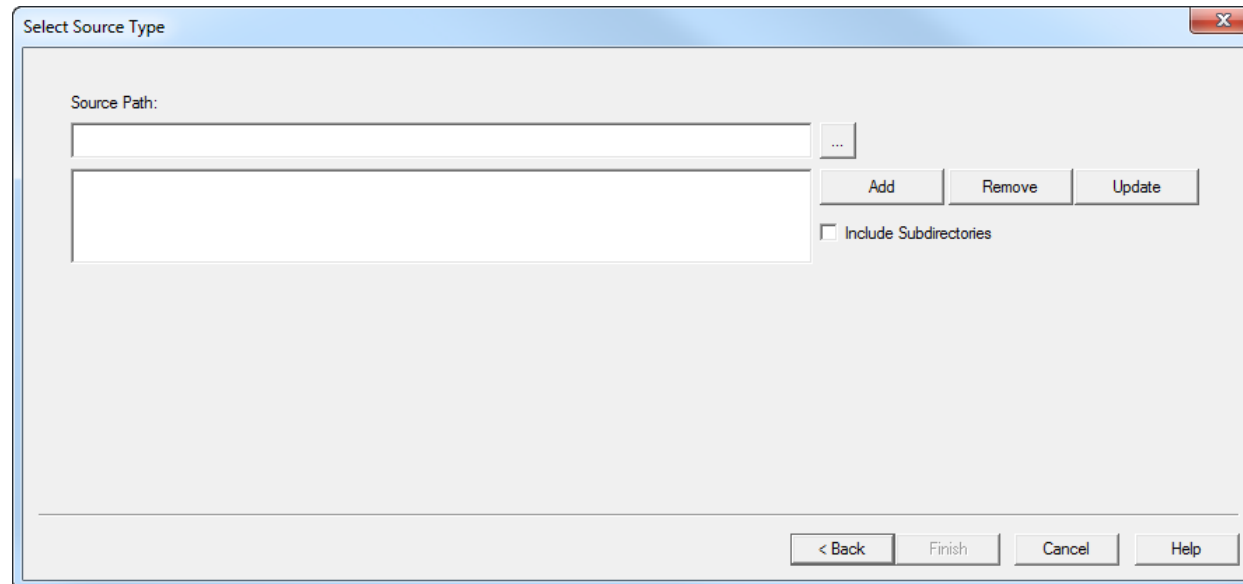



- 4 Select the **Source Setup** tab, then click **Configure Source**. The **Select Source Type** window is displayed.



- 5 Select **OCR for AnyDoc GTO Files** and click **Next**.

The **Select Location Of Source** window is displayed.



- 6 Click the **Browse** button, , and map to the .GTO source file(s).
- 7 To view information showing both template and zone names, select **Use Fully Qualified Fields**. Use this option to ensure the information is associated with a particular template, in the event that several templates with which you are working contain zones with the same names.

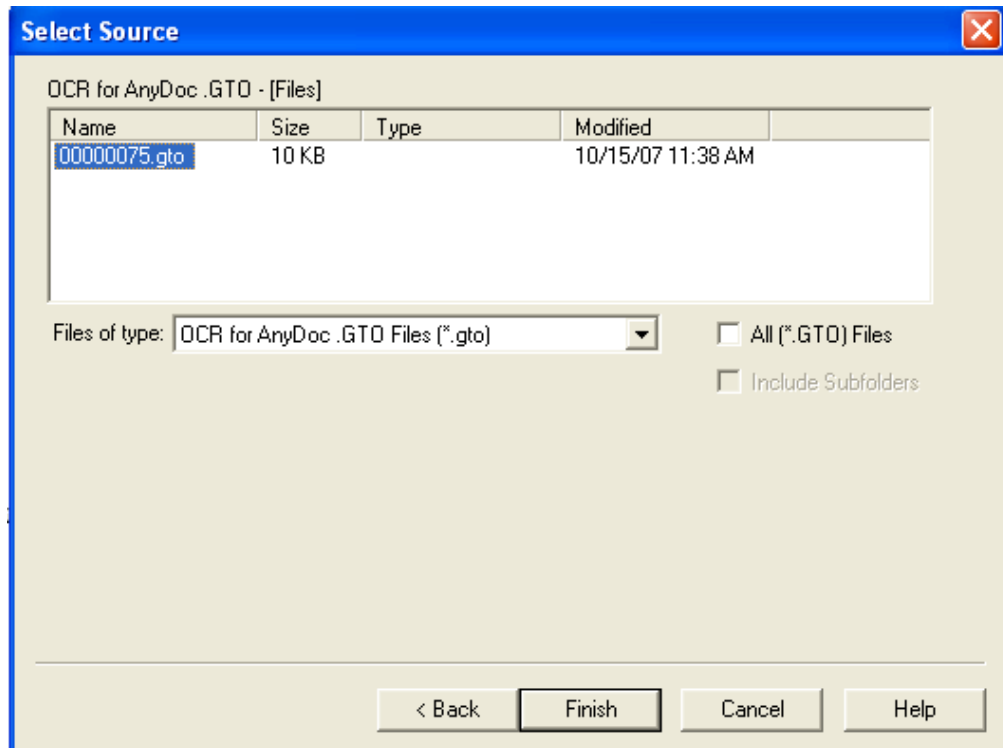
OR

To view the information showing zone names only, select **Use Unqualified Fields**. This option is commonly used in production environments to store information from different templates with identical zone names in the same destination field. The results appear in the Field Name column in the Source Mappings tab. For more information, see Source Mappings for a GTO File (page [40](#)).

- 8 Click **Next**.

Tutorial

The **Select Source** window is displayed with a list of .GTO files in the directory.



- 9 If the directory contains subfolders, select the **Include Subfolders** check box if the .GTO files are stored hierarchically in a folder structure rather than in one folder.
- 10 Select one .GTO source file from the list
OR
Click the **All (*.GTO) Files** button to select all files.
- 11 Click **Finish**. The Source Setup tab returns, showing the path information and file name of the source.
- 12 Select the **Source Mappings** tab.

If the destination is an imaging system or content management system, select the **Image** field and ensure the path specified is correct. If the path is incorrect, the image will not transfer.

Source Desc. Source Setup Source Mappings Source Options Source Selections Job Scripts								
	Available Fields	Field Type	Length	Scale	Default Val	Key?	Propagate?	Image?
1	B_NBR_OF_D...	Char	50			<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2	VERSION	Char	50			<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3	1999aim.FName	Char	20			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4	1999aim.MI	Char	1			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5	1999aim.LName	Char	20			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6	1999aim.Compa...	Char	40			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7	1999aim.Addre...	Char	40			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
8	1999aim.City_AC	Char	40			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
9	1999aim.State_...	Char	2			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
10	1999aim.Zip_A2	Numeric	10	0		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

The Source Mappings tab includes the following columns:

- **Available Field**
Lists the fields, which are zones from an OCR for AnyDoc master form template, available for mapping.
- **Field Type**
The type of data in that zone. For example, Numeric.
- **Length**
The length of the zone.
- **Scale**
Refers to the number of digits to the right of the decimal point and is used when working with currency values.
- **Default Value**
Not available at this time.
- **Key?**
Identifies the genuine key fields. When Multiple Record per Image is selected, the Key? column propagates the information through the subrecords of the same image.
- **Propagate?**

Tutorial

A user can propagate a field with its value to subsequent records until a new, nonblank value appears. When using OCR for AnyDoc as a source, propagating stops at a batch file break.

- Image?

Allows you to mark the field that contains image path information. Click in the appropriate row, as needed. The column only accepts one selection, and you must have a path indicated. If a valid path is not indicated in the selected field, the image does not transfer.

13 Click **View Source**.

If the source was successfully linked to EXCHANGEit, the contents of the the 00000075.gto file is displayed.

If the source was not successfully linked to EXCHANGEit, no content or the wrong content displays. Reevaluate the **Source Setup** tab for accuracy if no content displays. Check that the directory and source are correctly mapped.

Source Desc.		Source Setup	Source Mappings	Source Options	Source Selections	Job Scripts		
	Available Fields	Field Type	Length	Scale	Default Val	Key?	Propagate?	Image?
1	B_NBR_OF_D...	Char	50			<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2	VERSION	Char	50			<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3	1999aiim.FName	Char	20			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4	1999aiim.MI	Char	1			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5	1999aiim.LName	Char	20			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6	1999aiim.Compa...	Char	40			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7	1999aiim.Addre...	Char	40			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
8	1999aiim.City_AC	Char	40			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
9	1999aiim.State_...	Char	2			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
10	1999aiim.Zip_A2	Char	10			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

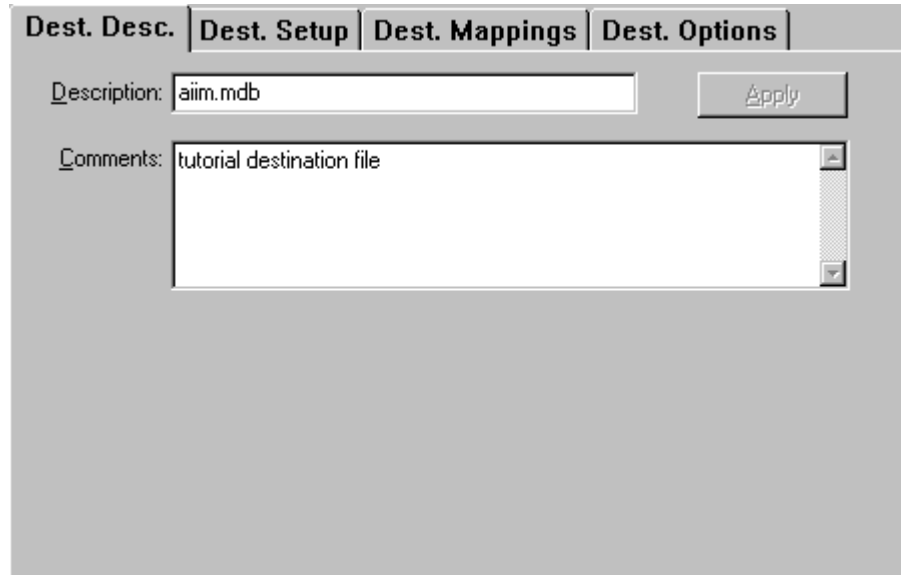
B_NBR_OF_DOCS	VERSION	1999aiim.FName	1999aiim.MI	1999aiim.LName	1999aiim.Company	1999aiim.Address_A1
5	3.1.25	LISA	J	JONES	NEVADA IMAGING SOLUTIONS	4227 BURNHAM AVE
5	3.1.25	WILLIAM	J	CLINTON	FEDERAL GOVERNMENT	1600 PENNSYLVANIA AVE NW
5	3.1.25	WILLIAM	H	GATES	MICROSOFT	ONE MICROSOFT WAY
5	3.1.25	JESSE	G	JAMES	WELLS FARGO	36711 JEFFERSON AVE
5	3.1.25	MERIT	L	GREAVES	MTI	3217 W O8ISPO ST

14 Select the **Source Options** tab.

The **Qualified Field Names** and **Multiple Records Per Image** check boxes are selected by default. The .GTO path appears in the **GTO File Source** field. For more information about the **Source Options** tab and the **Source Selection** tab, see Sources (page 25).

Configure a Destination

- 1 Select the **Destination** node in the left pane of your window. The Dest. Desc. tab is displayed.

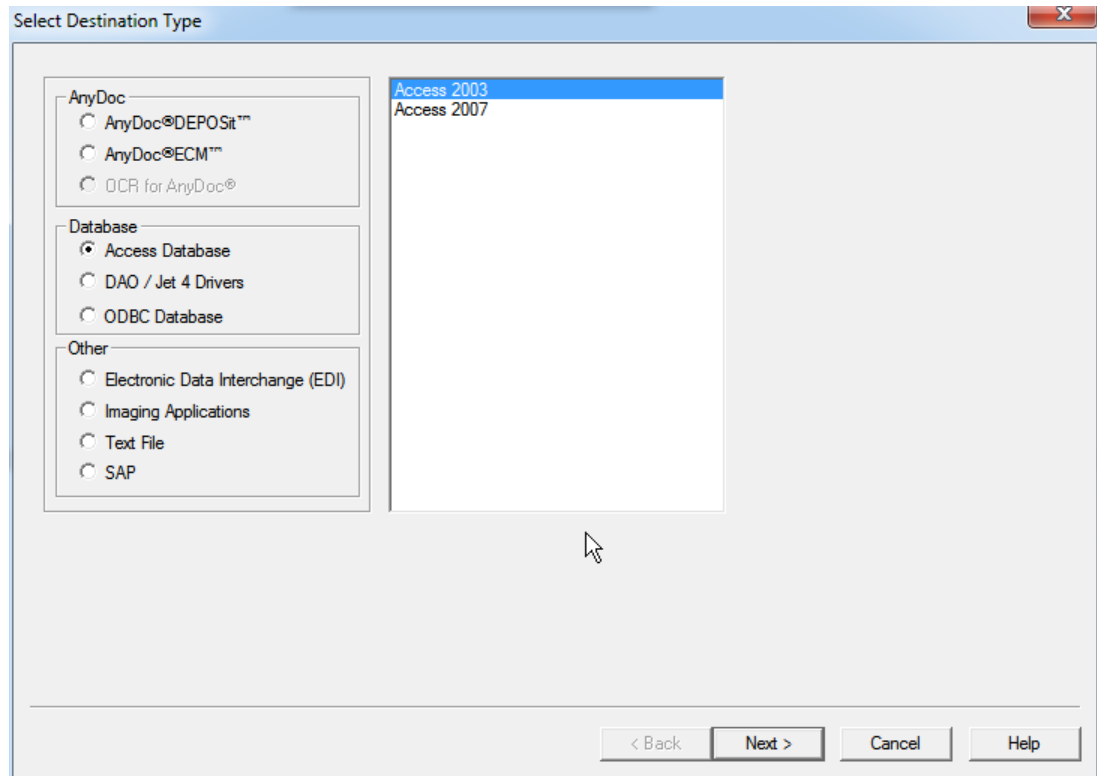


The screenshot shows a software window with four tabs: 'Dest. Desc.', 'Dest. Setup', 'Dest. Mappings', and 'Dest. Options'. The 'Dest. Desc.' tab is active. It contains a 'Description' label followed by a text box containing 'aiim.mdb'. To the right of this text box is an 'Apply' button. Below the 'Description' field is a 'Comments' label followed by a larger text area containing the text 'tutorial destination file'.

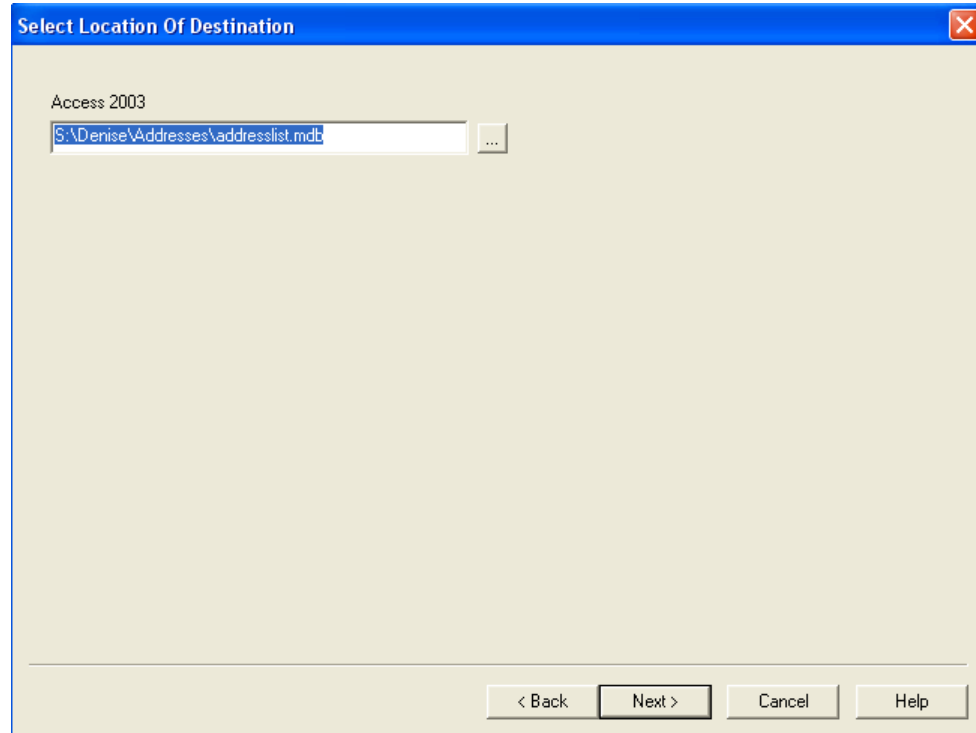
- 2 Enter aiim.mdb in the **Description** field and a description of the job in the **Comments** field. Consider the length of your description so that it does not create an overly long node. Additional details fit best in the Comments area.
- 3 Click **Apply**. The destination name appears on the Destination flowchart symbol (node).
- 4 Select the **Dest. Setup** tab and click **Configure Destination**.

Tutorial

The **Select Destination Type** window is displayed.



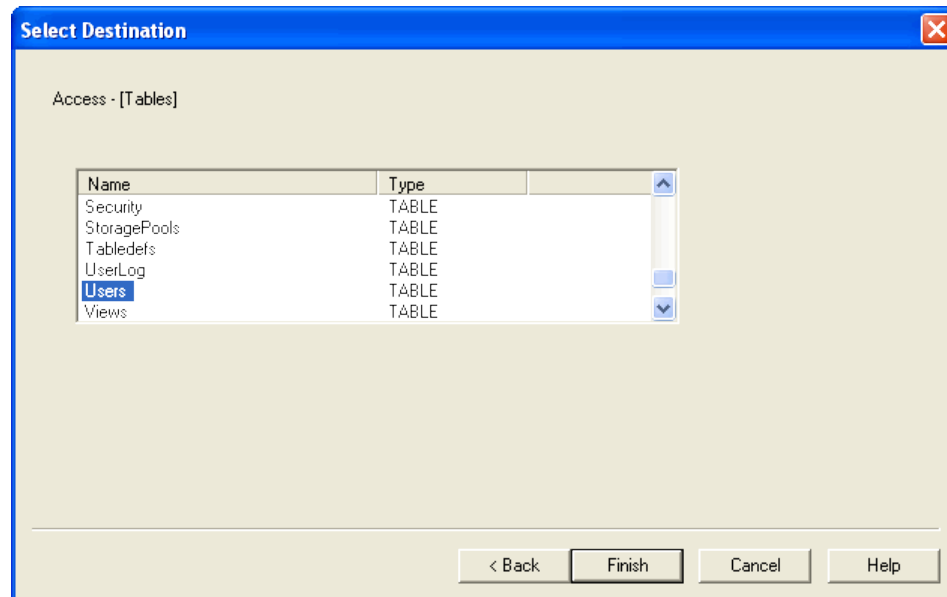
- 5 Select **Access Databases**, select the Access Database type and click **Next**. The Select Location Of Destination window is displayed. The tutorial database directory is located in the EXCHANGEit folder.



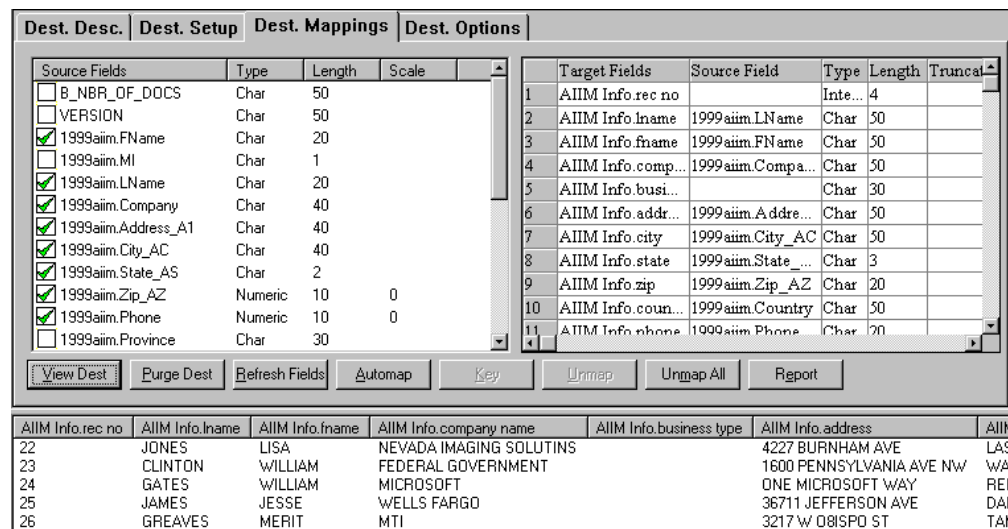
- 6 Click **Browse**, , navigate to the EXCHANGEit directory, select **aiim.mdb** and then click **Open**. The Select Location Of Destination window returns, displaying the location you have selected.

Tutorial

- 7 Click **Next**. The Select Destination window appears, listing the available tables in the selected Access database.



- 8 Select the **AIIM Info** table.
- 9 Click **Finish**. The Dest. Setup tab returns, displaying the full path of your destination file.
- 10 Select the **Dest. Mappings** tab. The Source Fields are displayed in the left pane and the Target Fields in the right pane.



Functions on the Dest. Mappings tab include the following:

- **View Dest** - Allows you to view if information is present in the destination. If

no information appears and you are sure there is information in the destination, reevaluate your Destination Setup for correctness. Check to make sure you have entered the proper control path in your destination setup and that the information source itself is readable.



Purging your destination information is an irrecoverable action within EXCHANGEit and should be used carefully.

- **Purge Dest** - deletes information in the destination.
- **Refresh Fields** - updates the EXCHANGEit list of fields. Use this option if you update the table structure in the source or destination after you have already defined the job.
- **Automap** - automatically maps source fields to target fields that have similar names
- **Key** - marks a key field. A key field identifies a record in a table. To select the field, right-click the field number (the column furthest to the left), and click the Key icon. A key field must be unique within the table; otherwise, it would not be able to be used as a key field. A key icon appears in the field column.

Key Icon

7	AIIM Info.city	1999aiim.City_AC	Char	50	
8	AIIM Info.state	1999aiim.State_...	Char	3	
9	AIIM Info.zip	1999aiim.Zip_AZ	Char	20	
10	AIIM Info.coun...	1999aiim.Country	Char	50	
11	AIIM Info.phone	1999aiim.Phone	Char	20	

- **Unmap** - unmaps the selected mapped target fields
 - **Unmap All** - unmaps all mapped target fields
 - **Report** - generates the results of the mapping process, creates a file or prints a hard copy of your mapping and helps you troubleshoot any mapping problems.
- 11 Click **View Dest** to make sure you have successfully linked to the destination file and to check the contents of the destination file. In this case, you only see column headings because the destination file has not yet received the information from the source file.

AIIM Info.rec no	AIIM Info.lname	AIIM Info.fname	AIIM Info.company name
------------------	-----------------	-----------------	------------------------

Tutorial

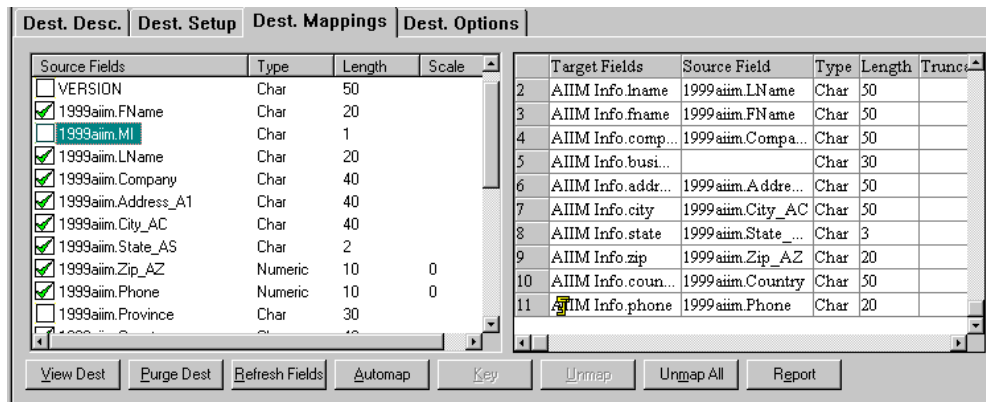
In many instances, you must drag and drop source fields to destination fields. To do this, place the mouse pointer in the **Source Field** you want to map. Press and hold the left button and drag the mouse until the pointer is over the **Target Fields** to which you want to relate the source. Release the mouse button. A green check mark appears next to the source field, showing that field is mapped. Repeat this process for as many fields as you want to map.

When the source and destination fields share the same field names, you can use **Automap** to map all source fields to similar destination fields with one mouse click.

12 Click **Automap**.

The **AutoMap Options** window is displayed. Both comparison options are selected by default. Deselect either or both options if you are not comparing qualified fields or you do not want to impose a case sensitive comparison. Qualified Field Names refers to names that include both template and zone names. See Sources (page 25).

13 Click **OK**. Notice that green check marks now fill the check boxes to the left of the fields in the Source Fields column, and the Source Fields column in the right pane is populated with the name of each source field.



14 Click **Unmap All** to undo the mapping you have done and start over.

15 Click **Refresh Fields** to restore the view to its original state.

16 Click **Report** to save a record of your activity.

The Report window is displayed. Options include:

- **Screen**

The report is displayed on the screen in the **Report** window. Click **Close**.

- **File**

Specify the name and location to save the report and click **Save**. The file is saved as a .TXT file.

- **Printer**

Specify the print options and click **OK**.

The report displays all of the information within the target field grid, such as the source field mapped to the target field, type and length. Use the report to identify problems occurring in the destination and to view the results of the source-to-target field mappings.

17 Select the **Dest. Options** tab.

18 If key fields have been marked on the destination, you can choose from the following options:

- **Check for Duplicate Record Before Adding** - Select this check box to keep the transfer from failing if the database does not allow writing duplicate records. An error message appears if you leave this option disabled and there are duplications in your records. Key fields must be defined first. Key fields are defined on the **Dest. Mappings** tab.
- **If Duplicate, Update Existing Record** - Select this check box to update existing records with any new information. For example, if a person's last and first name are key fields and are duplicated, but the address has changed, the record is updated with the new address. This action is determined by the particular database being used and the way the requirements are configured by the database user.



Purging your destination information is an irrecoverable action within EXCHANGEit and should be used carefully.

- **Purge Destination Before Adding New Records** - Select this check box to purge destination information when adding new records or information. If no new records of information are added, then the destination is not purged.
- **Purge Destination Before Running Job** - Select this check box to remove all records in your destination before running a job. After selecting this option, a screen appears asking you to confirm your choice.
- **Check Fields for Data** - Select this check box to check mapped source fields for an absence of data.
- **Error Threshold** - If you know certain jobs may contain bad data, you can use this option to account for errors before those errors prevent the entire job from running properly. Enter a number up to which errors are tolerated. If the job exceeds the error threshold, the job stops running and you must manually identify and correct the errors. If your program generates an error report, do not raise the **Error Threshold** number to eliminate an error report without checking for the cause of the error. In conjunction with the Exception Handler, set this option at a high enough level to allow all records with bad data to be handled. Handle Record Errors (page [297](#)) explains how to correct errors after a job is


Tutorial

run.

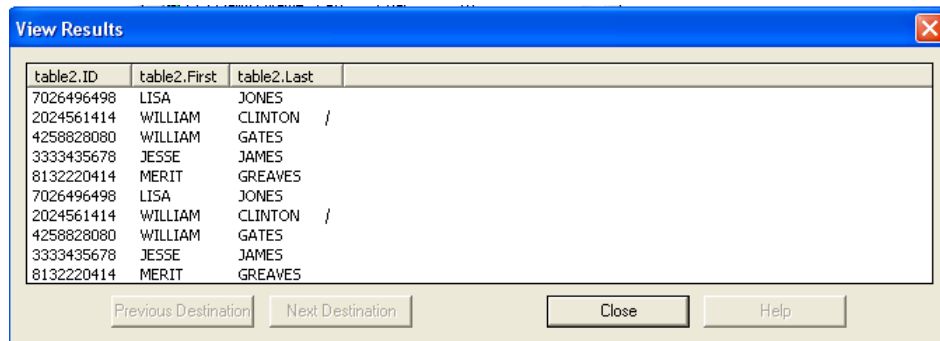
Transfer Information


Moving data from a source to a destination is EXCHANGEit's main function. However, before you do this, you should always test the operation first to make sure everything is configured correctly. By running a test, you are given the opportunity to check all the information to ensure that it is correct.


Steps

- 1 Configure a source and destination and click the yellow **Test** button, , to verify configuration.

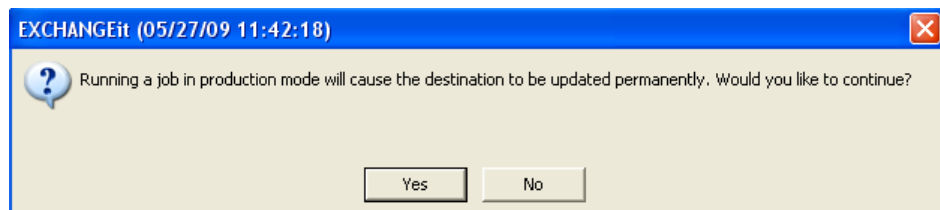
The **View Results** window displays the contents of the source files to be sent to the destination.



 If no data appears in the View Results window, then click View Source on the Source Mappings tab and review the source and mappings.

- 2 Click **Close**.
- 3 Click the green **Run** button, .

A warning message appears asking if you would like to continue. This message provides a last chance to correct anything before the transfer is committed.





If the run job transfer fails while the test worked, the problem could be the destination. Check your destination configurations for accuracy and browse the History Database to assist in determining the cause of the problem. See Handle Record Errors (page [297](#)).

- 4 Click **Yes** to run the task.

The **View Results** window is displayed, showing what actions were taken during the transfer. See Handle Record Errors (page [297](#)).

- 5 Click **Close**.

- 6 Select **File | Save As**, name the file, and click **Save** to save your file.

Glossary of Terms

Symbols & Numeric

.NET Framework

Component needed to design and run .NET software applications.

Visit the .NET home page for additional information on the .NET Framework at www.microsoft.com/services/net/default.asp.

A

AccuID

An OCR for AnyDoc method for identifying master form templates. This method builds a classification table based on the unique topology of each form family template and compares the template to incoming data images. AccuID sorts and identifies data images from the correct template for processing.

AccuZip

A database that validates and formats addresses in the United States of America according to USPS Publication 28. It is capable of processing address information from virtually all states in the United States and its territories, including APO/FPO addresses.

ACE Settings

Available on Bell+Howell scanners with ACE boards to provide automatic image enhancement, which can increase success rates for barcode recognition and OCR applications.

Active User

Any user currently logged onto BROKERit.

Add Documents View

View in the Query module where documents and data are added to the BROKERit database.

ADF Timeout

The length of time (in seconds) that the auto document feeder looks for work.

Algorithm

The AnyApp equivalent of a zone, in OCR for AnyDoc. It is also used to refer to the collection of AnyApp specific parameters that tell the system how to locate on particular piece of data. An algorithm is also called a routine.

AND/OR

Query operators in search criteria that widen or narrow the query:

- AND - narrows the search by retrieving records that contain all of the field values.
- OR - widens the search by retrieving records that contain any of the field values.

Annotation

Art drawn on an image. Available in the Add Document View and Display Document View.

AnyApp Templates

A template that contains data which can be found in different locations on forms and therefore uses algorithms rather than zones. Locating data on an unstructured form requires the use of AnyApp technology. AnyApp is an additional cost option with OCR for AnyDoc.

AnyDocCLAIM

AnyDoc Software's product that automates healthcare forms processing.

AnyDocEOB

AnyDoc Software's product that quickly processes all Explanation of Benefits (EOB) forms.

AnyDocINVOICE

AnyDoc Software's product that expedites invoice processing and reduces the need for manual data entry in the Accounts Payable department.

API

Application Programming Interface. A method by which a programmer can make requests of the operating system or another application.

Application

For BROKERit, An "electronic filing cabinet" that organizes one or more related document types. Applications are the highest level at which you group documents and data.

For AnyApp, a collection of algorithms designed to process a particular form type for a customer. This is equivalent to a master form in OCR for AnyDoc.

Application View

Main view in the Query module where the first query of each type is run and is the view that displays at logon.

Archive Directory

The location where the image file must be saved if it is to be maintained after processing.

Glossary

Arrow

Annotation consisting of a line with an arrow at one end.

ASCII Output Directory

The location of the ASCII text file output by OCR for AnyDoc.

Attachments

In OCR for AnyDoc, images not identified as a master form to be archived without having any data extracted.

Audio

Annotation that attaches a WAV file to the image.

Auto ID Zone

A template zone that allows the use of the Automatic Form Classification processing of data images. OCR for AnyDoc inspects the scanned image and automatically determines which master form template to use for processing each data image. Using Auto ID eliminates the need to manually sort forms prior to scanning. An Auto ID point can be a literal, that is, text that appears on every form in the batch or a barcode.

Auto Save

Saves a temporary copy of the master form template at specific intervals; this option ensures that work is saved up to the last incremented save if an event such as a power outage occurs.

AutoFlow

An automated method to invoke batch processing in OCR for AnyDoc or VERIFYit where the workstation polls for and processes pending batches.

Available Fields

Fields in the source file that can be mapped to a Target Field in the destination.

B

BAK file

A backup file created automatically or by user command that contains the second most recent version of a file (with a .BAK file extension).

Barcode

A special identification code consisting of a series of vertical bars used to represent alphanumeric data. Used for rapid reading of data by an input scanner.

Barcode Zone

On an OCR for AnyDoc template, used to recognize and convert barcodes into alphanumeric data.

Batch

A collection of images processed against the same form family.

Batch Control

Window options used to perform activities that affect a batch of forms.

In OCR for AnyDoc and CAPTUREit, a batch control expression providing information about the batch, such as the date created and number of images in the batch, can be output as the first record in the ASCII output file.

BatchAPI

A customizable Application Programming Interface (API) that helps programmers customize OCR for AnyDoc. Typically, the BatchAPI is installed on the workstation that initializes the batch.

Black Out Zone

A solid black zone placed on an image to hide information. Useful for blocking sensitive information, such as social security numbers, from users who query the document.

Black out zones are allowed in the document type and drawn in the same manner as a zone. The No Read field permission is then assigned to the zone.

Bounding Box

The smallest rectangle that contains the ASCII data.

BROKERit

AnyDoc Software's electronic document storage and retrieval system used to index, archive, retrieve, and manage stored data and images.

BROKERit Password

The password used to log onto the BROKERit application. This password is assigned by the BROKERit Administrator or may be your network password.

Button

Annotation in a button shape that can be linked to another object.

C

CAPTUREit

AnyDoc Software's product used to scan invoices, forms and documents either locally or remotely for processing at a central site.

Glossary

Character Constraint Boxes

A method of restricting the amount of data that can be entered on a form by providing a specific number of boxes to be filled in by the user.

In DESIGNit, character constraint boxes automatically become a text zone in OCR for AnyDoc during automated processing.

Character Counting Procedure

In OCR for AnyDoc, a type of Conditional Procedure that allows the user to define a procedure based on the number of selected characters found in a row.

Character Density

Parameters on the Character Filter tab in OCR for AnyDoc expressed in a percentage of the total amount of pixels comprising the character versus blank space surrounding the character. Also see Character Filter.

Character Filter

OCR for AnyDoc Form Removal Parameters used to assist in form removal and improve character recognition by defining what constitutes a character.

Character Translation Procedure

In OCR for AnyDoc, a type of Conditional Procedure that replaces a defined character (or string of characters) with another character (or string of characters), removes questionable flags, hides rows, or flags rows based on whether or not the character is found.

Checksum/Checkdigit

A safety measure used to determine the acceptability of a numeric value via a series of characters that are validated mathematically.

ClientType

A column heading that indicates how the user connected to the application:

- InterNetwork - indicates that the user accessed the application inside the network.
- Computer Name - indicates that the user accessed the application across the internet.

CMP

A compressed file (.CMP) that contains a backup copy of a master form template, form family, or a specific batch as well as the associated files, such as .FRF or .BAK files. This file can be restored to recover items, such as a previously scanned image.

Commit

The final phase of OCR for AnyDoc batch processing, where output files (txt, gto and xml) and archive images are written to the appropriate directories. Optionally, an EXCHANGEit project can be run automatically at Commit to transfer the output to a database, imaging destination, and so on.

Component Gallery

For DESIGNit, a Component Gallery contains an extensive list of predefined components, such as address information fields and registration points for automated processing, to build parts of a form quickly. When designing part of a form to be used over again, add it to this collection.

Conditional Procedure

User-designed routines that feature advanced character searches, recognition, and replacements. A conditional feature retains or filters data, based on the specific condition.

Conditions

Tests that can be applied to DataWords that would return a true or false. For example, the length of the DataWord is four. When conditions are used in AnyApp, they must be filters or retainers. See Filters and Retainers.

Config File

File ending in ".config" that defines system parameters and allows logging. BROKERit provides three config files:

- Web.config - located in the Server directory
- IBAdmin.exe.config - located in the Clients directory
- IBRetrieve.exe.config - located in the Clients directory

Contains

This is used along with the three character classifications (digits, letters and symbols) to create conditions. Contains implies that the DataWord has at least one of a particular character type.

Contrast

A feature that adjusts a scanner's tolerance for the differences between the lightest and darkest areas on the image (not available for all models of scanners).

Glossary

Control Path

The OCR for AnyDoc directory is the central location to store information that is shared among all of the stations, such as user information and log database. MANAGEit is points to this directory and gathers the necessary information to monitor, manage and report on the OCR for AnyDoc stations. The control path is also the bridge OCR for AnyDoc and the VERIFYit® Server and between OCR for AnyDoc and CAPTUREit Server.

Control Path Definition

Defines all of the settings for monitoring, managing and reporting on an OCR for AnyDoc installation in MANAGEit. The control path points MANAGEit to the location of the OCR for AnyDoc information. Additionally, the Control Path Definition contains settings pertinent to the available windows such as size, position, refresh rate, and column settings.

Crystal Reports

The brand of reports generated from the Administrative module under Tools | Reports.

D

DAO

Data Access Objects. A library of objects with associated properties and methods that makes it easier to access a relational database.

Data Definition Parameters

In OCR for AnyDoc template design, used to set up Field Definitions, attach Conditional Procedures, establish Group Zone Relationships, and define Zone Names. Data Definition Parameters are only available at the zone level (**P-Oil Can** + D).

Data Source

In OCR for AnyDoc applications, the data source is typically an ODBC-compatible database to which a system database can be installed, and from which table structures can be imported.

In BROKERit, the data provider accessed by BROKERit and users to send and receive information. You log onto a data source each time you log onto BROKERit. Data sources contain BROKERit system tables and user define tables created for document folders and data tables. When performing queries, the data source is the source that is queried. Must be SQL Server or OLE DB.

Data Table

An internal or external table that stores data that is not linked to documents. Data tables can be created in BROKERit or you can link to an existing data table from another data source.

Data Table Query View

The view that allows you to query the data stored in data tables. You can query one data table at a time.

Data Type

Indicates what kind of data can be entered in the field and how the data is stored in the database table, such as alpha or numeric characters, maximum length and number of decimal places.

Database

A collection of tables composed of records and fields used for data storage.

Database Password

The password assigned by the BROKERit Administrator to log onto the database after logging onto BROKERit.

DataWords

Tokens that are candidates to be the final outcome of an algorithm. Zero or more DataWord may be returned based on the parameters set in algorithm.

Date Extraction

An Intelligent Extract Parameter used in OCR for AnyDoc template design to recognize and convert dates on data images to a standard format. For example, if the input is February 8, 1990 or 02/08/90 or 2/8/90, setting the output to (YYMMDD) outputs 900208 in all three cases.

DBMS

Database Management System. A program, which stores and manages information. For example, Oracle, SQL Server, or Access.

DCOM

Distributed Component Object Model. A Microsoft specification that dictates how devices communicate over a Windows-based network.

Debug

For OCR for AnyDoc, this feature saves the current data images to a debug folder for testing against the master form template during the Debug phase of batch processing. Also, it creates a backup of current images and master form templates.

Default Value

Value entered in the field if no other field value is filled.

Delimiters

Characters added to separate information fields.

Glossary

DESIGNit

AnyDoc Software's product that creates professional paper forms and master form templates preformatted for OCR for AnyDoc's automated data capture software.

Deskew

Skew refers to how much rotation the text has in relation to a horizontal reference line. An image that is not perfectly square is considered "skewed." Deskew is the function of removing skew.

Despeck

Also referred to as "despeckle." Removal of stray pixels, or "noise," on the form that meet a maximum height and width requirement. Pixels below or meeting the maximum height and width requirement are considered as noise, rather than data.

Detail View

The view that displays when you open a particular record from the Result view; also known as the Display Document View.

Digits

Numeric characters from zero to nine. Any printable character that is returned from the OCR engine is classified as only one of these types (digits, letters and symbols).

Display Document Toolbar

Custom toolbar for the Display Document View that provides shortcuts to tasks you can perform only in the Display Document View.

Display Document View

View from which documents opened from query results display. This view displays both the image and fields associated with the image. The fields available in the Display Document View are those defined in the Detail view of the document folder or data table.

Dithering

A technique used on black-and-white images that removes areas of dot shading to simulate shades of gray.

DLL

Dynamic-Link Library. An operating system feature that allows executable subroutines (with a .dll extension) to be stored separately and only loaded when needed by a program.

DocID

The unique identification number assigned to all documents added to BROKERit. This number is internally assigned and cannot be changed.

Document

In BROKERit, the electronic file or image added to the BROKERit database. Documents are the images retrieved in queries or scanned into BROKERit.

Document Controls

In OCR for AnyDoc, select the inclusion of additional information, that is not included on the data image, with every data image's output record. For example, include the date and time.

Document Folder

Consists of five components that control how documents added to this document folder can be queried: fields, indexes, links, views and permissions.

Document Format

The file format of documents added to BROKERit file repositories. Certain file formats are viewable within BROKERit, and other file formats require a plug in.

Document ID

See DocID (page [372](#)).

Document Table

For BROKERit, a document table contains search fields. At least one document table must be included in an application. Creating document tables is an administrative task.

Document Type

Categories assigned to documents to differentiate one document from another. Document types are associated with a document and annotation file repository and determine whether documents of that type may have black out zones.

Document Zone

See Zone (page [395](#)).

Domain

A unit of network users with assigned policies and permissions. Each domain user is assigned a unique user ID and password.

Dot Matrix

Text or images formed by patterns of dots.

Double Key

An additional Verification phase of OCR for AnyDoc batch processing where zone data is verified twice, either by a recognition engine or a second operator.

DPI

Dots Per Inch. A measurement of print or display resolution.

Glossary

Drivers

The interface to the hardware, often in the form of DLLs. They handle the problems of dealing with different file structures and communication between incompatible systems.

DSN

Data Source Name. Used by ODBC data sources for specifying path and file name, and connection information.

DTD

Document Type Definition. A text file (with a .dtd extension) that dictates what source information can appear in an XML file.

Dynamic Threshold

Dynamically changes the contrast settings to more clearly scan characters of varying darkness.

E

EDI

Electronic Data Interchange. A file that standardizes and automates the exchange of data. EDI files are referred to as "transaction sets" and are comprised of segments, elements, subelements and loops. EXCHANGEit provides EDI destinations in a tree structure.

Edit Line

The line in the OCR for AnyDoc Classic Verifier containing the recognition engine's data.

Edit Mask

Limits what the recognition engine interprets by further defining the attributes for data being entered. It also can be used to reduce or eliminate common substitution errors in alphanumeric fields (such as 1 or L for I, 0 for O, 5 for S, and 3 for B).

Electronic Document

Embedded Picture

Annotation that embeds a graphic file into the image, rather than linking the graphic file.

Encryption

Annotation that scrambles the text beneath the "encryption" shape so that the text is illegible.

Endorser

A mechanism found on some scanners that prints an incrementing number on an image.

Enhancement Parameters

A set of tools used to help fine-tune form removal and recognition, and to define rules and output specifications.

Erode

"Peels" off the outer layer of the character and is useful for "thinning" bold characters.

Exceptions

In OCR for AnyDoc, the Exceptions phase allows the operator to manually classify data images that are not identified against the master form templates in the Form Family Processing List, make an attachment page, or delete the image.

EXCHANGEit

AnyDoc Software's standalone information transfer product that transfers captured data and images from one application to another.

Expression Builder

A code-generating tool used for VBScripting, the Expression Builder simplifies the process of creating equations for functions. In this box, buttons are provided to insert the appropriate expression in the code.

External Table

A database table connected through an ODBC link.

In BROKERit, a table integrated with BROKERit that resides on a database other than the BROKERit database.

Extract Process

OCR for AnyDoc batch control process that deskews the image, performs form removal functions, enhances images, regenerates characters, runs the applicable recognition engine, such as OCR or ICR, and applies pre- and post-processing rules that have been set.

F

FAXit

AnyDoc Software's product that functions as an intermediary between a PC's fax card and OCR for AnyDoc.

Field

Placeholder in a database table that holds information in a specific format. Data can be entered directly in the field or imported into the field from another data source.

Glossary**Field Definitions**

In OCR for AnyDoc and DESIGNit, field definitions create a grouping of parameters designed for a certain type of zone, such as a date or social security number, that can be applied to any zone.

Field Description

A brief explanation of the field. Field description is used in the Query module as the field name.

Field Filter

A function that predefines field values in a particular field to force to query the field by only the predefined values.

Field Mask

The format used to enter field values in the Add Documents View and Detail view. The field entry must exactly match the format defined by the field mask. For example, an field mask for social security numbers could be "nnn\ -nn\ -nnnn."

Field Type

Allowable format of data in the Available Field of the source, such as Date, Time, Currency, Char, Numeric and Integer.

Field Value

The entry within a field.

File Repository

The external network directory where documents added to BROKERit are stored. After the file repository is added to the BROKERit database, the physical file is relocated to the file repository associated with the document type. Documents retrieved in query results are viewed from the file repository.

Filled Ellipse

Annotation in an ellipse shape that can be filled in with color.

Filled Polygon

Annotation in a polygon shape that can be filled in with color.

Filled Rectangle

Annotation in a rectangular shape that can be filled in with color.

Filters

In BROKERit, filters customize security options or create quick access to often-viewed fields. Creating filters is an administrative task.

In AnyApp, a filter discards the DataWord if the condition is true (condition is met).

Folder Query View

The view that allows you to perform a query on a single document folder.

Form Family

One or more master form templates grouped together for batch processing.

Form Removal Parameters

Assist in the removal of form elements (such as lines and unwanted characters) on either a form or zone level from a form in OCR for AnyDoc template design.

Freehand Line

Annotation that allows you to draw a line according to your mouse movements.

FRF file

Contains the parameter settings for a master form template (with an .FRF file extension).

Fuzzy Logic Procedure

A type of Conditional Procedure that displays or hides rows of text based on whether or not the defined search literal is found in any particular row.

G

Gateway Form

The name of the initial page encountered when using an interactive form created for the Internet.

Geometric Condition

Based on the location of where the DataWord was found. For example, the DataWord is on the top half of the form or the DataWord is below the KeyWord.

Global Character

Field within a document folder that has the Global Search option enabled and has a Character data type. Global character fields are search criteria in global queries.

Global Numeric

Field within a document folder that has the Global Search option enabled and has a Field data type. Global numeric fields are search criteria in global queries.

Global Query View

The view that allows you to perform a global query on all document folders and data tables.

Group

A set of users that are assigned the same security rights.

Glossary**Group Address Zone**

In OCR for AnyDoc, the Group Address Zone provides a means of designating individual zones as specific parts of an address and applying the appropriate Intelligent Address Extract Parameters to the zones.

Group By

Option in query results that groups records with the same column value together. This allows you to view records that have the same matching characteristic together.

Group Column Zone

On an OCR for AnyDoc template, used to sort output of multiple data zones. Group Column zones can be used for columnar machine-print data that needs to be zoned individually to take advantage of zone level parameters (increases recognition accuracy).

Group Zone Procedure

A type of Conditional procedure that hides or flags rows of text based on whether there is information in other columns of text that are designated as Primary or Secondary Zones.

GTO

Generic Text Output. An optional text file in a proprietary format produced by an OCR for AnyDoc job, containing information about a particular job such as its form family, data, template, associated TIFF images, template zone names, and coordinates. It is useful for linking to other applications because its format makes it easily parsed. In EXCHANGEit, the GTO file created by OCR for AnyDoc is optimized for easy transfer to other applications.

H

Hardware Key

AnyDoc Software, Inc. provides you with a hardware key coded to your specific purchase. This hardware key attaches to the parallel port or USB port of the computer and requires Rainbow Sentinel Drivers to allow the AnyDoc Software product(s) to operate.

High Speed Verification

An optional Verification phase in OCR for AnyDoc batch processing in which operators see only the image's questionable characters. High Speed Verification is "high speed" because Verification operators correct all the questionable characters in a batch at the same time rather than tabbing to each questionable character on a data image.

Highlighter

Annotation that draws shaded areas over the image.

Hollow Ellipse

Annotation that draws an ellipse shape that is not filled in with color. The image shows through the shape.

Hollow Polygon

Annotation that draws a polygon shape that is not filled in with color. The image shows through the shape.

Hollow Rectangle

Annotation that draws a rectangle shape that is not filled in with color. The image shows through the shape.

Host Application

A DBMS in which the system database is installed.

Hot Spot

Annotation that creates a link to another object.

I**ICR**

Intelligent Character Recognition. A process using an engine that converts handwriting into ASCII text.

Image

A reproduction of an original file created by scanning or faxing the original file.

In EXCHANGEit, a check box in the Source Mappings tab that, if enabled, indicates whether the source field is a path to an image file. Only one field can be identified as an image path. Additionally, the image path must be valid to transfer the image.

Image Reference

Annotation that links to an external image file, rather than embedding the picture.

Import

The process of bringing images into OCR for AnyDoc with or without the use of a scanner. Import is a batch processing phase in OCR for AnyDoc.

Index

A catalog of field values from one or more fields used to expedite data retrieval in a query.

Integrate Windows Logon

Check box that controls whether you logon with your BROKERit or network identification.

Glossary

- If enabled, you are automatically logged onto BROKERit with your network user name and password.
- If disabled, you must enter the user name and password defined in your BROKERit user account.

The check box is located on the logon window and under Preferences.

Intelligent Extract Parameters

On an OCR for AnyDoc template, Intelligent Extract recognizes a date, an address, or a currency type and converts data for that zone into a user-specified format (for example, all dates can be converted to the format mm/dd/yyyy, no matter how the date is written).

Intensity

Adjusts the scanner's tolerance for the degree of darkness on the image.

Interactive Processing Mode

Testing a master form template by viewing the effectiveness of it without switching windows. Testing a master form template is accomplished in two steps: testing the master form template by itself and testing the master form template against debug images.

Internal Table

In OCR for AnyDoc, tables created within or imported into the OCR for AnyDoc directories that are used to assist in the validation of data on the images.

A table integrated with BROKERit that resides in the BROKERit database. The BROKERit database is the internal database containing the BROKERit system tables.

Invert

In OCR for AnyDoc, a Form Removal Parameter that detects areas of inverse text (white letters on black background) and converts it to normal text (black letters on white background).

IP Address

Internet Protocol Address. A 32-bit binary number that uniquely identifies each computer on the network.

IPX

Internetwork Packet Exchange. A LAN communications protocol used by Novell NetWare to address and route packets within and between LANs. Also see SPX.

Is Entirely

Implies that every character in the DataWord is of the specified type. This phrase is used along with the three character classifications (digits, letters and symbols) to create conditions.

ISO

International Organization for Standardization. An international group working toward establishing global communications standards.

J**Job**

A job in EXCHANGEit which consists of one or more projects (an .xjb file) that are scheduled to run.

Job Queue Directory

A temporary location where OCR for AnyDoc stores its processing files. These files identify the status of each job/image/page. In a network environment, this location should be a network drive.

JPG file

Joint Photographic Experts Group (.JPG extension). An ISO standard for storing images in compressed form.

Julian Date

The day of the year (from 1 to 365) for the current date, (e.g., 060 is the Julian date for 03/01/95).

K**Key**

A set of unique numbers or character sequence in each record in a table (e.g., social security number).

Key Field

A field that uses a unique number or character sequence to identify each record in a table. The Key? check box is in the Source Mappings tab.

- If the source is a database, select the Key? check box associated with the genuine key field
- OR

Glossary

- If the source is a GTO file and the Source Options tab | Multiple Records Per Image check box is selected, select the Key? check box to propagate the field's data in all of the records in the image.

Key From Image

The process by which data entry operators view forms as electronic images on their workstation monitor rather than as paper entities. The key from image approach to data entry has been documented as being 10% more efficient than traditional data entry methods.

- In BROKERit, Key From Image activities occur in the Query Module.
- In OCR for AnyDoc, the Key From Image Verification GUI is the default Verification method.

Keywords

Tokens used to narrow a search in an algorithm. The most common Keywords are the pre-printed literals that appear on the form. When searching for a particular piece of data, first search for the keyword and then attempt to find the data by using its relative location and distance to the various tokens on the form.

L**LAN**

Local Area Network. A privately owned communications network usually limited to computers and other devices dispersed over a small geographic area.

Legacy Data

Data that has already been collected and stored in a database.

Length

Maximum number of characters that a field can hold. See Field Length (page [29](#)) for more information.

Letters

Alpha characters from A to Z (location dependent). Any character that is returned from the OCR engine is classified as only one of these types (digits, letters and symbols).

Line Removal

Line Removal assists in form removal by defining what constitutes a line. A line is defined as any set of pixels that run horizontally or vertically creating a line longer than the defined Minimum Line Length and shorter/thinner than the Maximum Line %. The Line Removal tab is found under Form Removal Parameters in OCR for AnyDoc.

Link

Method of joining document folders and data tables together so that fields from both sources can be viewed simultaneously. The following links are permissible:

- Document Table to Document Table
- Document Table to Data Table
- Data Table to Data Table

You cannot link a Data Table to a Document Folder.

Linking

In BROKERit, joining data tables to a document table.

In EXCHANGEit, connecting multiple sources to one destination through common Key fields.

Literal

A character that represents itself and does not denote another character or function. A special character can be made a literal character by placing a "\" before the special character.

Log Database

An audit tool that maintains statistics of all processing that has taken place within some AnyDoc Software products. These statistics provide information, such as the number of keystrokes made by the Verification operator, to make the necessary adjustments to forms processing.

Logical Condition

Based on the DataWord's ASCII text (e.g., The length of the DataWord is four).

M

MANAGEit

AnyDoc Software, Inc.'s product designed to monitor, manage and report on OCR for AnyDoc® PC stations and activity from a single station in the network.

Manual Indexing

In BROKERit, the process of assigning areas of a particular document to a particular field in a document or data table.

In DESIGNit, the process of assigning fields on a form to comparable fields in a database.

Glossary

Map

The act of associating a zone with one or more fields.

Mark Sense Mark

A mark on a form consists of the presence of pixels within a defined area, such as a check mark in a box, a filled-in oval, or a signature. The recognition engine searches for the presence (a “hit”) or absence (a “miss”) of a mark.

Mark Sense Zone

A type of zone on a form that defines an area that is evaluated for the presence marks (such as a check boxes). Mark Sense parameters allow the modification of the hit / miss conditions and output for Mark Sense and Reader Response zones.

Mask

Specific format assigned to a field that restricts field values to a spe

Master Form Template

A template with zones and parameters defining what areas of the form need to be recognized, verified, and output. All forms processing in OCR for AnyDoc is performed through the use of a master form template.

Maximum Character Height

In OCR for AnyDoc, a Form Removal Parameter that sets character height (in pixels) that cannot be exceeded for a character to be considered data.

Maximum Character Width

In OCR for AnyDoc, a Form Removal Parameter that sets the largest width permissible for a character or a set of touching characters in an image to be considered data. For connected characters, the maximum character width should allow for the largest width of the connected set.

Maximum Line %

In OCR for AnyDoc, a Form Removal Parameter that sets the maximum allowable relationship of the thickness of a line to its length to be considered a line (height/width ratio). The default value is 15%.

MICR

Magnetic-Ink Character Recognition. A form of character recognition that reads text printed with magnetically charged ink. For example, account numbers printed on checks.

Mode

Three possible states that determines the format of field values. These states are as follows:

- **Data** - Applies to the database format when the field entry is saved to the database. The field entry is saved to the database in the selected Data Mode format. This is the mode used by fields in reports.
- **Display** - Applies to the BROKERit format. The field entry displays in the selected Display Mode format, which occurs in the Query view and Result view.
- **Clip** - Applies to the clipboard format. When copied, the field entry is formatted in the Clipboard Mode.

Multiple Folder Query View

The view that allows you to perform a query on more than one document folder.

N

NetBIOS

An interface used by application programs on a Local Area Network comprised of IBM-compatible computers running a version of UNIX.

Noise Filtering

Removes particles (black dots representing noise) from the image.

Note Zone

On an OCR for AnyDoc template, Note zones define areas that are not processed by an OCR or ICR engine. The operator is prompted to enter this data during the Verification phase of batch processing. A Note zone is useful to mark unconstrained handprint.

Null

The absence of a field value.

O

OCR

Optical Character Recognition. A process using an engine that converts machine print into ASCII text.

OCR for AnyDoc

AnyDoc Software's forms processing product that takes scanned or imported images and outputs ASCII text.

ODBC

Open Data Base Connectivity. A programming interface used to access and manipulate data via Structured Query Language (SQL) in relational database management systems (RDBMS), such as Microsoft Access, Microsoft SQL Server, Oracle and dBase.

Glossary

Omit Zone

On an OCR for AnyDoc template, Omit zones define areas of the form ignored during OCR or ICR evaluation.

Operator

Controls how mathematical values are handled by VBScripts.

The condition to place on the search criteria. Eleven different operators are available to limit or expand search criteria.

Also synonymous with a person who uses the software.

Orientation

Output Parameters

Select the configuration and manipulation of both text and images output by OCR for AnyDoc.

Overlay

An image that is superimposed on all data images during Verification and/or archived for a specific master form template. Used with dropout forms.

P

Pass 1 Verification

An OCR for AnyDoc Verification phase which enables an operator to view a data image's questionable characters in the context of the zone and form in which they appear. Pass 1 Verification also allows the operator to correct any recognition rules implemented via Rules Parameters, Mark Sense Parameters, or Table Link Parameters.

Pass 2 Verification

An optional OCR for AnyDoc Verification phase that functions either as a method to verify data not examined by Pass 1 Verification, or as a follow-on supplement to Pass 1 Verification.

Patch Code

A parallel pattern of alternating black bars separated by spaces and placed near the leading edge of a paper document. Sometimes used to separate documents and batches or to perform classification.

Pending Work

Batches that currently exist (imported but not committed) within batch processing.

Pepper

A series of dots or noise that interferes with data extraction.

Permissions

Security measures that are applied to objects, such as database tables.

In BROKERit, access options assigned to users at the document folder, data table and field level to grant or restrict access.

Pin-Up Text

Annotation that appears to pin text to the image with a push pin.

Pixel

Picture (Pix) Element. A filled-in dot in a grid, that when viewed in context with other filled-in dots, forms text or a picture on a computer window or on paper output by a printer.

POC

Point Of Contact. A person in an organization who can answer questions about a specific issue or policy.

Polyline


Annotation that draws a series of connected straight lines.

Post Recognition Parameters

Alter the format of ASCII output after the recognition process.

Preferences

Personal settings that can be retained and implemented each time you logon to BROKERit, such as changes to the interface, logging on using your network identification or manually entering in your user ID and password at logon.

Access Preferences under the File menu or on any window that includes a Preferences button or  button

Primary Key

A column within a database table that contains no duplicate values. All values are unique.

Project

In EXCHANGEit, the process of configuring the appropriate source, links, and destinations to facilitate the desired movement of information. A project is an .xjb file.

Propagate

Fills the field value down to blank field values. The Propagate? check box is available in the Source Mappings tab and is either enabled or disabled. Select the Propagate? check box to propagate the value of a filled field to blank fields below the filled field. When using OCR for AnyDoc as a source, propagation stops at the end of a batch.

Glossary

Protractor

Annotation that measures the angle between two points.

Q

Qualifier

Displaying the full path to the field rather than just the field name as follows: database name, table name and field name or description, separated by a period. For example, the PolicyNo field is qualified as BROKERITNET.Policy.PolicyNo.

Quality Assurance (QA)

In CAPTUREit and OCR for AnyDoc, an additional batch processing phase that allows the operator to check and improve the quality of scanned or imported images.

Query

The process of sending search criteria to the data source to retrieve matching records. Queries are conducted in the Query module. Four types of queries are available:

- Global
- Multiple Folders
- Single Folder
- Data Table

Query Results

The records returned by the query that match the search criteria. Query results are comprised of documents and/or data.

Query Tree

Query View

The view in which you define search criteria.

Questionable Character

A character that the recognition engine is not completely certain of the value obtained (the confidence percent level is below the configured value).

R

Raster Image

Image formats such as .bmp, .tif, and .jpg that paint the window pixel-for-pixel.

RDBMS

Relational Database Management System. Information stored in tables that create a relationship between various tables within the database.

Reader Response Zone

On an OCR for AnyDoc template, Reader Response zones define areas of the form that are evaluated for the presence or absence of a mark (usually a circle) around a Reader Response number.

Record

A group of related fields in a database.

Redaction

Annotation that allows you to draw a shape over an area of the image to hide. Information behind the redaction annotation is illegible.

Registration Point(s)

Defined in OCR for AnyDoc and DESIGNit template design and used to align a form image to the associated master form template (by both translation and rotation). The registration points are used in the order they were initially defined to eliminate the skew created in the scanning process.

Registration Zone

On an OCR for AnyDoc template, the Registration zone contains a registration point. See Registration Point(s).

Relational Database

See RDBMS definition.

Resolution

The number of dots per inch in characters on a scanned form. The OCR for AnyDoc default setting is 300 dpi.

Result View

The view that lists rows of data retrieved in the query.

Retainers

The DataWord is kept if the condition is false (condition is not met).

Retrieval Log

A log file that tracks all of the documents viewed from query results. Activate the log file from BROKERit Properties.

Glossary**Rope and Expand**

Term for selecting part of a form in AnyDoc Software's template design. Roping and expanding "zeroes in" on a particular area on a scanned image. The smaller the roped area, the larger the expanded image is displayed. An area must be roped and expanded prior to adding a zone.

Routine

See Algorithm.

Routing Table

In OCR for AnyDoc, used to route forms to the import directory of the appropriate Form Family for processing. The Family Routing Table must contain the Auto ID literal as the lookup value and the file name of the Form Family as the translation value. This type of look up table is useful for forms that contain a variable identifier unique to a form. The Auto ID point must be in the same spot on all templates for a family routing table to be used.

RTF Edit

Rich Text Format Edit. Annotation that allows you to copy text from an external rich text file into the image.

Ruler

Annotation that measures the distance between two points. The unit of measurement defaults to millimeters, but can be changed.

S

Scale

Maximum number of digits allowed to the right of the decimal point. The number can be positive or negative.

Scaling

The process of enlarging/reducing a graphical image.

Search Criteria

The combination of the field, operator and field value in which to conduct the search.

Server

The computer that hosts IB Server and is the resource that all users must log onto to access BROKERit.

Solution

DataWords that are retained throughout the entire AnyApp process (the final outcome of the algorithm).

Sort

Method of rearranging rows of data by a particular column in ascending and descending order.

Soundex

A table lookup feature that finds words that sound similar to the word in question.

Splitter Line

Movable line used to separate elements on the interface, such as a tree view from the query results. Move a splitter line by clicking and dragging the line. Vertical splitter lines can be moved left and right. Horizontal splitter lines can be moved up and down.

SPX

Sequenced Packet Exchange. A LAN communications protocol used by Novell NetWare to ensure that packets routed within and between LANs are complete. Also see IPX.

SQL

Structured Query Language. A language used to access data from a relational database by using designated keywords and variable names.

SQL Statement

The statement sent to the database containing your search criteria to retrieve query results.

Static Literal

A text output field (denoted by brackets < and >) entered into a batch or Document Control statement that outputs exactly as entered. Used when the exact same text is needed to be output once per batch or record.

Sticky Note

Annotation in the shape of a sticky note that is attached to a zone and sent to the Verification Supervisor. If a zone has a sticky note attached to it all rules are ignored and must be resolved by the Verification Supervisor rather than the Pass1/Pass 2 Supervisor.

Straight Line

Annotation that allows you to draw straight lines.

String

A sequence of characters.

Structured Templates

A Structured template contains data that is located in or around the same location. This allows zones to be drawn on the form to locate and extract the data.

Glossary

Substitutions

Occur in OCR for AnyDoc when recognition engines present a character other than what was on the form without marking it as questionable.

Symbols

Any other character, other than zero to nine or A-Z, such as dashes or commas. Any character that is returned from the OCR engine is classified as only one of these types: digits, letters, or symbols.

T

Target Field

Field in the destination to which the source field is mapped and where the source field data is ultimately transferred when the job is run.

TCP/IP

Transmission Control Protocol/Internet Protocol. The transmission protocol developed by the Department of Defense that has become the standard protocol suite used on the Internet.

Template Properties Parameters

In OCR for AnyDoc, Template Properties Parameters are available on the Form level from the Parameters menu to change a template's description, background color, and orientation. These parameters are also used to view the scanner settings with which the master form was created, and to set a password for master form template access.

Terminal Services

Provides functionality similar to a terminal-based, centralized host, or mainframe, environment in which multiple terminals connect to a host computer. In the terminal services environment, an application runs entirely on the terminal server. The client workstation performs no local processing of application software. The server transmits the graphical user interface to the client. The client transmits the user's input back to the server.

Text From File

Annotation that allows you to add text to an image.

Text Stamp

Annotation that allows you to enter predefined strings, or codes, that cause information to display in the text stamp, such as the date, time or month.

Text Zone

An area of a form that contains information to be processed through the OCR or ICR engine. Text zones on a form are used for machine print or constrained handprint only.

TIF file

Tagged Image File Format, also known as TIFF. The scanned images that OCR for AnyDoc typically imports. Because TIFFs compress well, they are the industry standard for black and white forms processing.

Token

A set of continuous characters delimited by spaces. For example, Dog or "&yy9".

Tooltip

The text that appears when mousing over a toolbar icon. The tooltip displays the name of the toolbar icon.

Tree View

A hierarchical structure used to display different levels of information.

Truncated

Number of characters removed from a field value if the field value exceeds the maximum allowable field length. Characters in the field value that exceed the field length are removed.

Type

Allowable format of data in the Target Field of the destination, such as Date, Time, Currency, Char, Numeric and Integer.

Typed Text

Annotation that allows you to add text to an image.

U

UDP

User Datagram Protocol. A TCP/IP protocol that converts application-generated messages into packets to be sent to a destination within the network.

UNC

Universal Naming Convention (UNC). The full file path starting with the server name as opposed to a drive letter. UNC paths are entered in the following format:
\\servername\sharename\directory\file name.

In EXCHANGEit, file paths can be either UNC or drive letter specific.

Glossary

Unique Index

An index that contains unique values that are not duplicated within the database.

URL

Uniform Resource Locator. An address for a resource on the Internet (e.g., a web address).

User

The person interacting with the BROKERit software application. Users are generally assigned a unique user ID and password.

User Administration

A feature in OCR for AnyDoc that provides system administrators with a security tool to prevent users from changing existing settings by limiting access to whole menus or particular features in OCR for AnyDoc.

User Productivity

In OCR for AnyDoc, an administrative tool that allows productivity goals to be set for Verification operators. Productivity goals are measurable and can be set differently for each form family.

V

VBScript

An interpreted script language from Microsoft that is a subset of Visual Basic® programming language. VBScript is typically used for creating simple procedures.

Verification

A group of phases in OCR for AnyDoc batch processing where operators or supervisors review and correct questionable characters before the data and data images are “committed.”

Verification Parameters

In OCR for AnyDoc, Verification Parameters set if and how the data images associated with a master form template are verified and how Group zones are navigated during the verification process.

VERIFYit

Remote Verification. AnyDoc Software’s product that enables access to all phases of Verification from a remote location via a TCP/IP, UDP, IPX/SPX, and NetBIOS connection. From remote sites, stations can be working on Pass 1, Pass 2, Supervisor, High Speed, or Batch Balancing verification.

Views

Different methods for displaying information. BROKERit provides different views to make performing tasks easier. Most views have a unique toolbar with shortcuts to tasks.

W**Web Service**

Vehicle for open standards and interoperability written in Extensible Markup Language (XML) and using a standard Web protocol to communicate information.

Windows Domain

See Domain (page [373](#)).

Wizard

A guide that walks you through a process step-by-step, such as the data table wizard.

Work Flow Manager

The control panel for all production-level batch processing performed by OCR for AnyDoc and VERIFYit.

X**XML**

Extensible Markup Language. Language used by Web-based applications that describes structured data.

XSL

Extensible Style Language. Dictates how information in an XML file appears in a browser.

Z**Zone**

An area drawn on an image around a piece of information. Zones are associated with fields. The zone indicates to users where a field value is being taken.

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