

# AnyDoc® MANAGEit

*version 15*

## User Guide

**AnyDoc®**  
*a Hyland Software solution*



# NOTICES

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# Chapter 1

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## Introduction

AnyDoc® MANAGEit™ is a tool designed to monitor, manage and report on stations and activity from a single station in the network.

MANAGEit features include the following:

- Station/User Activity  
MANAGEit provides real time information about each station's activity, including time started, time elapsed and the active process, such as Extraction or Verification, for each station in the network.
- Monitor Pending Work  
Real time monitoring of all pending work in the system.
- Monitor AnyDoc® VERIFYit®, CAPTUREit, EXCHANGEit, and Version Manager  
Real time monitoring of all stations in the system.
- Management  
Access to OCR for AnyDoc Form Family Management and User Administration functionality.
- Alert Notification  
MANAGEit helps to identify process bottlenecks and inefficient use of PC stations.
- System Maintenance  
Allows you to purge batch log files as well as back up and purge the log database.
- Task Scheduler  
A tool that allows you to schedule routine tasks to perform automatically.

## Getting Help

If you have any questions that are not answered in this document, contact OnBase AnyDoc Technical Support (page [3](#)).

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

- Product version number (page [3](#))
- Computer hardware specifications
- Operating system specifications

## Introduction

- Frequency and severity of the technical difficulties encountered
- Exact wording of any system-generated messages

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

## Product Documentation

A documentation set is provided for each application. All documentation is accessible from the application, installation CD, or Customer Library (page 4). Review the documentation to learn how to use the application and answer any questions you may have about its features.




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

Documents within the set usually include:

- **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 OnBase AnyDoc Technical Support

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

### AnyDoc U.S.A. Office

Contact Technical Support via:

- **E-mail:**  
anydocsupport@onbase.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 Europe Office

Contact Technical Support via:

- **E-mail:**  
anydocisupport@onbase.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 09:00 and 18:00 (CET), Monday through Friday.

## View The Product Version Number

### Steps

- 1 From the **Help** menu, click **About MANAGEit**.  
The **About MANAGEit** 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 (EULA) that was accepted during the installation process is installed locally and can be viewed at any time.

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## Introduction

### 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 OnBase AnyDoc web site are provided under the **Help | AnyDoc on the Web** menu.

<b>Home Page</b>	Access the OnBase AnyDoc home page (www.onbase.com/onbase-anydoc) to read about AnyDoc products, solutions, and support.
<b>Customer Library</b>	Access the latest versions of products and supporting documentation. See Customer Library (page 4).
<b>Submit Enhancement Request</b>	Access an online form to submit a request for a new product or document feature.

## Customer Library

The OnBase AnyDoc Customer Library provides users with the ability to download documentation and software upgrades. It also allows users to upload files to our Technical Support department (page 5), if necessary.

## Access and Login

The OnBase AnyDoc Customer Library is accessed via a web browser.

### Steps

- 1 Go to the OnBase AnyDoc website at www.onbase.com/onbase-anydoc.
  - 2 Click the **AnyDoc Customer Library** button. The **Customer Library Logon** page is displayed.
  - 3 Enter your assigned **User Name** and **Password** and click **Logon**. The main **Customer Library** page is displayed.
- If you do not have a user name and password, contact Technical Support (page 3).

## Customer Library Options

In addition to providing access to documentation, new versions of software, and software upgrades, the main Customer Library page allows you to upload a file to Technical Support 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 OnBase AnyDoc Technical Support department. For information about uploading files, see [Upload a File to Technical Support](#) (page 5).

### 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 installers for OnBase AnyDoc applications.

### Sales and Marketing

Click this link to obtain sales and marketing materials for OnBase AnyDoc VARs and Partners.

### Enhancement Request Form

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.

# Chapter 2

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## Getting Started

Before starting MANAGEit for the first time, you need to know the OCR for AnyDoc control path(s) to monitor. The control path is used to link MANAGEit to your OCR for AnyDoc installation(s). The Control Path Definition window also contains settings pertinent to the available MANAGEit windows such as size, position, refresh rate, and column settings.

### MANAGEit Terminology

The following terms have special meaning when used in the MANAGEit environment:

- **Application:** Application settings affect all Control Path Definitions and their associated windows.
- **Control Path:** The OCR for AnyDoc Control directory is the central location to store information to be shared among all of the stations (e.g., user information, log database, station history data, etc.). MANAGEit points to this directory and gathers the necessary information to monitor, manage and report on the OCR for AnyDoc stations. The control path is the bridge between MANAGEit and the AnyDoc products that it monitors.
- **Control Path Definition:** Defines all settings that apply to monitoring, managing and reporting on an OCR for AnyDoc installation. The Control Path Definition also contains settings pertinent to the available windows such as size, position, refresh rate, column settings, etc.

### MANAGEit Toolbars

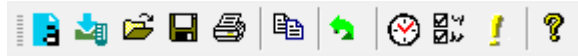
MANAGEit can display the following toolbars.












- Files and Settings
- Views
- Log Database
- Management

To toggle a toolbar display on and off, select **View | Toolbar** and select the toolbar to toggle on or off.



## Files and Settings Toolbar









Button	Shortcut	Function	Description
	[Ctrl+N]	New OCR for AnyDoc Control Path	Creates a new Control Path Definition to monitor an OCR for AnyDoc installation.
	N/A	New CAPTUREit Server	Creates a new Control Path Definition to monitor a CAPTUREit Server installation.
	[Ctrl+O]	Open	Opens an existing Control Path Definition to monitor an OCR for AnyDoc (*.ami) or CAPTUREit Server (*.aci) installation.
	[Ctrl+S]	Save	Saves the current Control Path Definition.
	[Ctrl+P]	Print	Prints the current (top most) window.
	[Ctrl+C]	Copy	All data that is displayed in the window can be copied to the Windows Clipboard and then pasted into other applications.
	[F5]	Refresh	Refreshes the information displayed in the current window.
	[Ctrl+Shift+S]	MANAGEit™ Task Scheduler	Opens the MANAGEit Task Scheduler.
	N/A	Control Path Definition Settings	Opens the Control Path Definition window to view or change settings for the current control path.
	N/A	Alert Settings	Opens the Alerts window to add or change alerts.
	N/A	View Help Contents	Opens the online Help.






## Views Toolbar








**Getting Started**

Button	Shortcut Key	Function	Description
	[Ctrl+2]	View Station Activity	Opens the Station/User Activity window to view current activity by workstation.
	[Ctrl+3]	View Pending Work	Opens the Pending Work window to view pending batches by form family.
	[Ctrl+7]	Graph Pending Work Totals	Opens the Pending Work Graph.
	[Ctrl+4]	View VERIFYit Activity	Opens the VERIFYit Activity window to view activity on VERIFYit workstations.
	[Alt+1]	CAPTUREit Activity	Displays activity on CAPTUREit workstations.
		EXCHANGEit Activity	Displays activity on EXCHANGEit workstations.

**Log Database Toolbar**

Button	Shortcut Key	Function	Description
	[Ctrl+8]	Log Database	Opens the Log Database Viewer.
	[Ctrl+6]	Log Database Report	Prints a log database report.
	N/A	Log Database Settings	Opens the Log Database Options   Backup window to set where database backup files are stored.
	N/A	Log Database Purge	Opens the Log Database Purge Criteria window to set criteria for purge database information.
	N/A	Compact and Repair	Compacts the database.

**Management Toolbar**

Button	Shortcut Keys	Function	Description
	N/A	Form Families	Opens the Form Family Management window. See OCR for AnyDoc Form Family Management (page <a href="#">246</a> ).
	N/A	User Security	Opens the User Security window.
	N/A	User Productivity	Opens the User Productivity window.
	N/A	QA/Verify Operator Groups	Opens the Operator Group Management window.
	N/A	Edit Audit Rates	Opens the Configure Operator Audit Rates window.

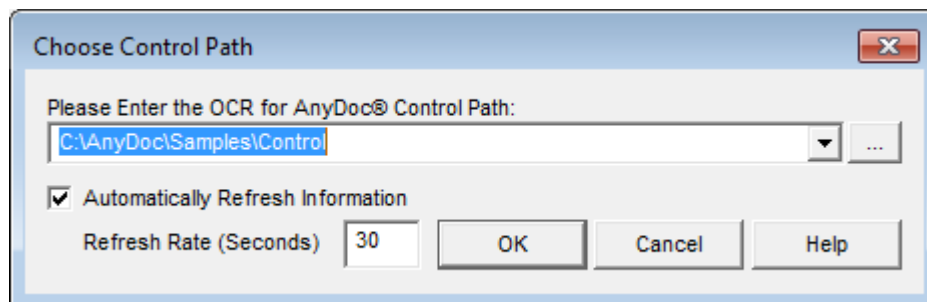
## Start MANAGEit


The first time you start MANAGEit, you must create a Control Path Definition. Once the Control Path Definition is set, the path cannot be changed. To monitor a different control path, you must create a new Control Path Definition. The refresh information can be changed later, if necessary.

### Steps

- 1 Select **File | New | New OCR for AnyDoc® Control Path**

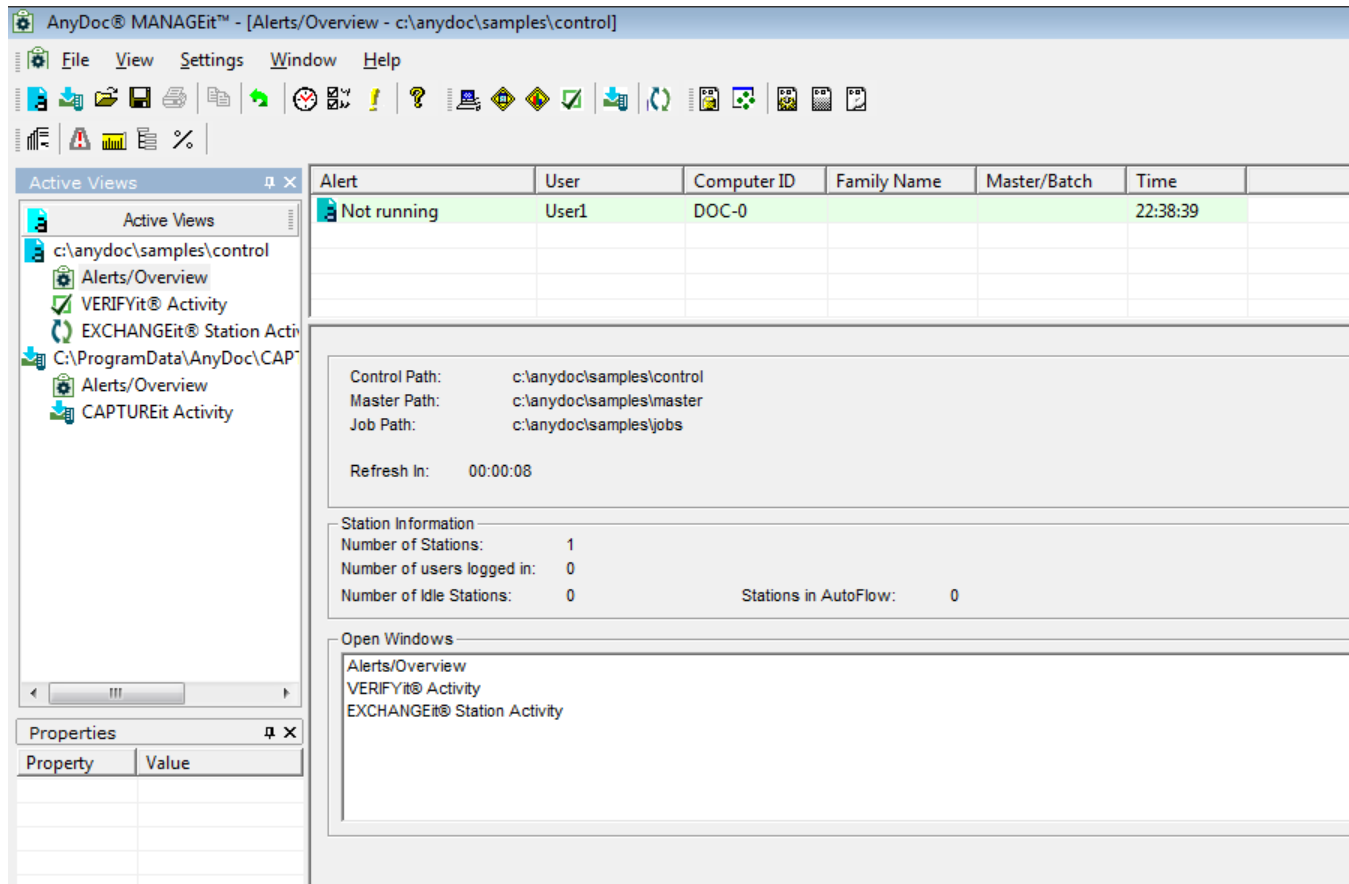
The **Choose Control Path** window is displayed.



- 2 Enter the control path for the OCR for AnyDoc installation to monitor, or click  to browse to the installation's location.
- 3 Leave the **Automatically Refresh Information** check box enabled, if needed.
- 4 If the **Automatically Refresh Information** check box is enabled, enter the number of seconds in the **Refresh Rate (Seconds)** field. The default is 30 seconds. Twenty seconds is the minimum amount of time allowed for the refresh rate.

## Getting Started

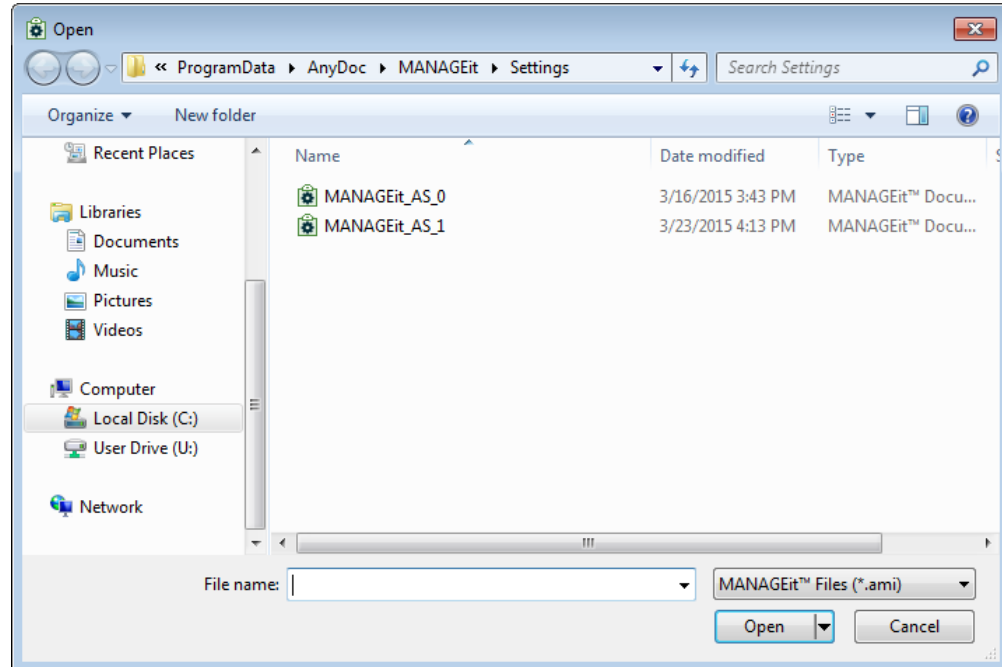
- Click **OK**. The main MANAGEit window is displayed with the Alerts window open to the specified control path. See Alerts Window (page 18).



After you have started MANAGEit for the first time, the open Control Path Definitions and their corresponding open windows, such as Station Activity, are automatically restored when you start another MANAGEit session.

If the **Synchronize With Server on Open** check box is selected in **Control Path Definition** and if there is a need to synchronize, the **Synchronize Time with Server** window is displayed when MANAGEit is opened. For more information, see Synchronize System Time (page 12). If you choose not to synchronize three times in a row, a message is displayed asking if you would like to turn off time synchronizing during data refresh.

- To open a saved Control Path Definition, click **File | Open**. The **Open** window is displayed listing all existing Control Path Definition files (\*.ami) at the default location, C:\ProgramData\AnyDoc\MANAGEit\Settings\.



- Select a Control Path Definition file and click **Open**. The associated Alerts window is displayed.

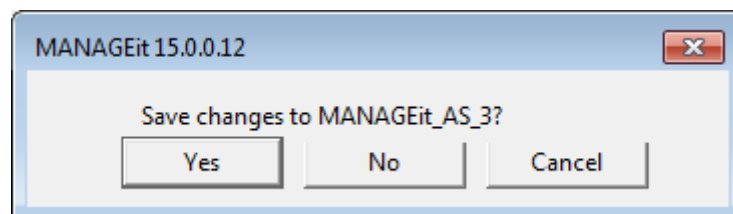
## Exit MANAGEit

Your open Control Path Definitions and their associated open windows (such as Station Activity, etc.) are automatically restored when you start MANAGEit again. If you close a Control Path Definition without saving, MANAGEit creates a temporary file and then reloads it the next time you start MANAGEit.

After creating a new Control Path Definition, use **File | Save As** to save it with a meaningful name. If it is not saved before exiting MANAGEit, a temporary file is created with a default name.

### Steps

- To exit MANAGEit, select **File | Exit**. When you exit MANAGEit, you are prompted to save the Control Path Definition if you have not already done so.



## Getting Started

- Click **Yes** to save the changes, or click **No** or **Cancel** to exit without saving.

Control Path Definition files (\*.ami) are saved to  
C:\ProgramData\AnyDoc\MANAGEit\Settings\.


## Synchronize System Time

You can control when the time on your MANAGEit station is synchronized with the server, either when MANAGEit is opened, upon every data refresh, or both. It is important to synchronize system time on the MANAGEit station with system time on the OCR for AnyDoc stations so that settings that rely on time such as alerts and elapsed time fields operate correctly. System time settings are located in the **Control Path Definition | General** tab.

### Steps

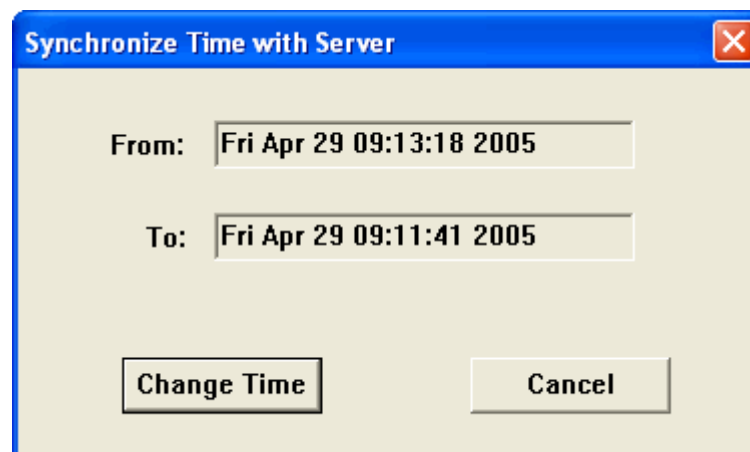
- Select **Settings | Control Path Definition Settings**

OR

Click the **Control Path Definition Settings** button, .

The **Control Path Definition** window is displayed.

- Click the **General** tab to access synchronization settings.
- Enable the check boxes in the **System Time** area to enable or disable time synchronization with the server. You can enable one option, both options, or neither option. The Synchronize With Server on Open option is enabled by default.
- Click **OK**. When the Synchronize With Server on Open option is enabled, if the time on your PC is different than the server time, you are prompted to synchronize when you open the Control Path Definition.



## Set MANAGEit Application Settings

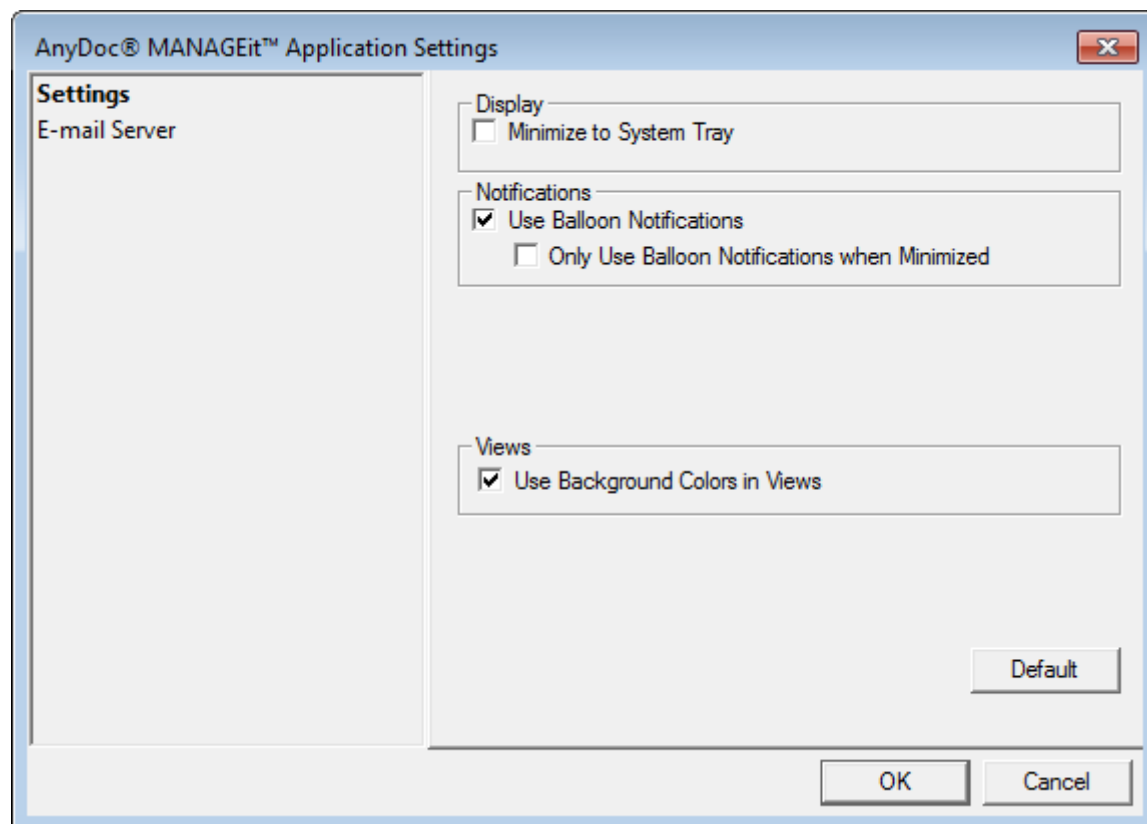
MANAGEit allows you to customize your window interface with the following choices:

- Minimize the display to the system tray
- Balloon notifications for alerts
- Use color to distinguish alternate rows

### Steps

- 1 Select **Settings | MANAGEit Application Settings**.

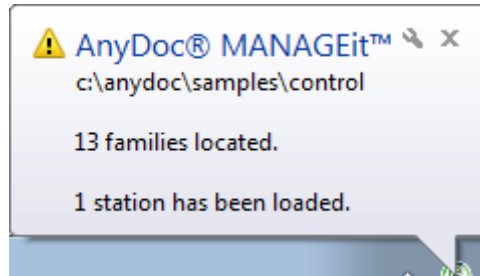
The **AnyDoc MANAGEit Application Settings** window is displayed.



- 2 Select the **Minimize to System Tray** check box to minimize the MANAGEit window to the system tray instead of the task bar.
- 3 Select the **Use Balloon Notifications** check box to receive balloon notifications of alerts, new stations and form families and stations that are currently filtered out.

## Getting Started

- 4 Select the **Only Use Balloon Notifications when Minimized** check box to only receive notifications when the MANAGEit window is minimized.



- 5 To turn off the colors so the background is white for all rows, disable the **Use Background Colors in Views** check box. By default, MANAGEit displays populated rows in various windows in alternating colors of green and yellow. Unpopulated rows appear in white.
- 6 Click **OK**.

## E-mail Server

You can configure e-mail settings for all e-mails that MANAGEit sends, including alerts, task notifications and error messages. Notifications are sent through e-mail when MANAGEit automatically refreshes the data and the state has changed, when MANAGEit is started, when e-mail reports are scheduled via the Task Scheduler, and when File | Send Alerts is selected from the menu.

E-mail is SMTP-based, but some Microsoft Outlook features have been implemented (such as Address Book and Selection Lookup).

### Steps

- 1 Select **Settings | MANAGEit Application Settings**.  
The **AnyDoc MANAGEit Application Settings** window is displayed.



- Click the **E-Mail Server** tab.

The screenshot shows the 'AnyDoc® MANAGEit™ Application Settings' dialog box with the 'E-mail Server' tab selected. The 'Settings' pane on the left has 'E-mail Server' highlighted. The main area contains the following fields and controls:

- E-mail Server** section:
  - ☐ Enable E-mail From This Station
  - Server Address:** A drop-down menu.
  - SMTP Port:** A text field containing '25'.
  - Lookup** and **Test Server** buttons.
  - From:** A text field containing 'manageit@'.
- Recipient Groups** section:
  - A list box containing '[Default]'. To its right are **New**, **Remove**, and **Edit** buttons.

At the bottom of the dialog are **OK** and **Cancel** buttons.

- Select the **Enable E-Mail From This Station** check box.



If this option is cleared, all windows that allow you to configure e-mail recipients are unavailable.

- From the **Server Address** drop down list, select the e-mail server. Click the **Lookup** button if the server you need is not in the drop down list and you are using Microsoft Outlook  
OR  
Enter the name of the e-mail server in the field.
- Click **Test Server** to test the server connection.
- To specify a specific **SMTP Port**, enter a number in the field, if needed. The default SMTP port is 25.
- Enter the sending e-mail domain name in the **From manageit@** field.
- If applicable, do one of the following:
  - To create a new group, click **New** and configure the e-mail settings. For more information, see Configure E-mail Settings (page [16](#)).
  - To remove a group, select the group and click **Remove**.

**Getting Started**

- To edit an existing group, select the group and click **Edit** and configure the e-mail settings. For more information, see Configure E-mail Settings (page 16).

9 Click **OK**.

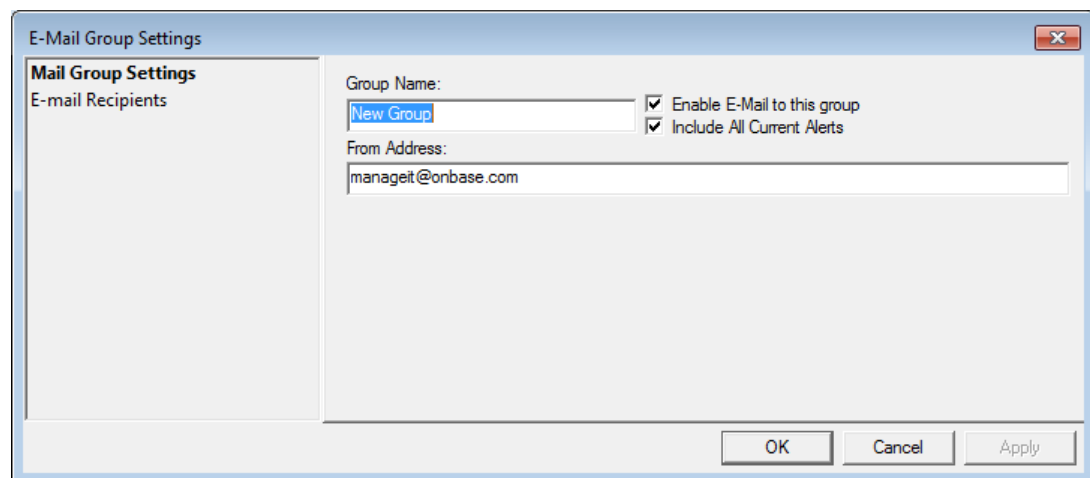
## Configure E-mail Settings

To specify the e-mail recipients, groups must first be created. Groups can contain one or more e-mail addresses and must have a unique name. e-mail recipients are specified by selecting the group name. Therefore, it is important to name each group with a unique and meaningful name that allows for identification of the group's members.

E-mail groups can be created, deleted and edited at any time. The Default group's settings can be modified but it cannot be renamed or deleted.

### Steps

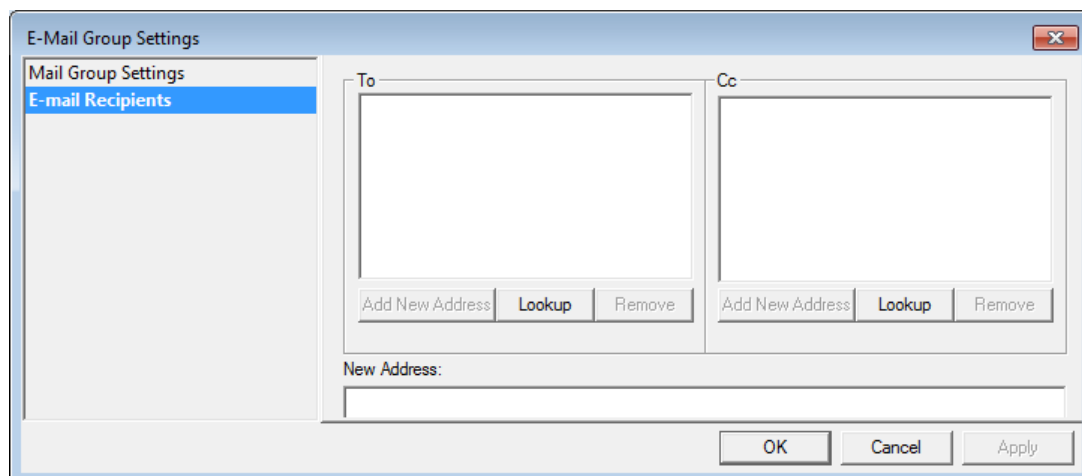
- 1 On the **E-mail Configuration** window, click the **Mail Group Settings** tab.



- 2 In the **Group Name** field, enter the name for the group.
- 3 In the **From Address** field, specify the e-mail address that the e-mail should be sent from.
- 4 To allow e-mails to be sent to this group, select the **Enable E-mail to this group** check box.
- 5 To include the **Alerts Currently in the System** section in the e-mail, select the **Include All Alerts Currently in the System** check box.

If this check box is cleared, then that section is omitted from the e-mail; only new and expired alerts are included.

- 6 Click the **E-mail Recipients** tab.



- 7 To add a new address to the **To** or **CC** list, in the **New Address** field, enter an address to add to the group and click **Add New Address**.
- 8 To open the Outlook address book and find an e-mail address to add to the group, click **Lookup**.
- 9 To remove an e-mail address, select the e-mail address and click **Remove**.
- 10 Click **OK**.

# Chapter 3

## User Interface

MANAGEit presents information about OCR for AnyDoc stations and pending work in a series of windows. You can customize these windows to present the information in the format and order most useful to you. Specifically, you can do the following:

- Hide or show columns (page [23](#))
- Arrange column order (page [25](#))
- Change column width (page [34](#))

### Alerts Window

When you open a Control Path Definition, the associated Alerts window opens automatically. It shows any active alerts and provides general information about the MANAGEit station and stations in the OCR for AnyDoc installation.

Alert	User	Computer ID	Family Name	Master/Batch	Time	
Not running	User1	DOC-0			22:38:39	

Control Path: c:\anydoc\samples\control  
Master Path: c:\anydoc\samples\master  
Job Path: c:\anydoc\samples\jobs  
Refresh In: 00:00:08

Station Information  
Number of Stations: 1  
Number of users logged in: 0  
Number of Idle Stations: 0  
Stations in AutoFlow: 0

Open Windows  
Alerts/Overview  
VERIFYit® Activity  
EXCHANGEit® Station Activity

Property	Value

The Alerts window shows active alerts triggered when the conditions set in the alerts configuration, are met. The available alert types include:

- Station Activity Alerts

Station activity alerts are about conditions on individual workstations. You can set station activity alerts to occur when a workstation has been idle, is not running OCR for AnyDoc, has no work available, or has been in a specific processing phase for more than a specified number of minutes.

Station activity alerts display in the Alerts window and appear as a red exclamation point next to the applicable station or user in the Station/User Activity window. You also have the option of sending alert notifications via e-mail. MANAGEit only sends out alert e-mails during a refresh.

In addition to the alerts you can configure, the "Station may require user intervention" message can also be displayed. This alert means that the station has not been updating its status properly and should be manually checked for indications that its processing has been interrupted. This alert is on by default and cannot be edited or removed.

Right-click an alert in the list to access the following options:

View Station	Opens the Station/User Activity window with the selected station/user highlighted. See Monitor Station/User Activity (page <a href="#">43</a> ).
View Station History	Opens the Station History window with the selected station highlighted. See View Station History (page <a href="#">48</a> ).
Configure Alert	Opens the alert configuration to change it. See View Station Activity Alert Settings (page <a href="#">84</a> ).
Copy All Data	All data that appears in the window can be copied to the Windows Clipboard and then pasted into other applications.

- Pending Work Alerts

Pending work alerts apply to pending batches and form families. Pending work alerts display in the Alerts window and appear as a red exclamation point next to the applicable form family or batch in the Pending Work window. There is also the option of sending alert notifications via e-mail.

Right-click an alert in the list to access the following options:

View Batch/Family	Opens the Pending Work window with the selected Form Family/batch highlighted. See Monitor Pending Work (page <a href="#">59</a> ).
Configure Alert	Opens the alert configuration to change it. See View Pending Work Alert Settings (page <a href="#">86</a> ).
Copy All Data	All data that appears in the window can be copied to the Windows Clipboard and then pasted into other applications.

- System Level Alerts

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**User Interface**

System level alerts concern conditions that can potentially cause system problems. These alerts are predefined in MANAGEit and are always activated. The list of system level alerts can be viewed, but not changed in the Alerts window.

Right-click an alert in the list to access the following options:

- |                  |  |
|------------------|--|
| More Information | Displays more information about the specific error encountered. For more information, see View System Level Alert Settings (page <a href="#">91</a> ). |
| Copy All Data    | All data that appears in the window can be copied to the Windows Clipboard and then pasted into other applications.                                    |

- Metered Key Alerts

Alerts can be set for when the metered application falls below a specified minimum.

Right-click an alert in the list to access the following options:

- |                 |   |
|-----------------|---|
| Configure Alert | Opens the alert configuration to change it. See View Metered Key Alert Settings (page <a href="#">93</a> ).         |
| Copy All Data   | All data that appears in the window can be copied to the Windows Clipboard and then pasted into other applications. |

- EXCHANGEit Alerts

Alerts can be set to occur when an EXCHANGEit workstation or job is in specific processing state for more than the specified number of minutes.

The following two rules are created by OnBase AnyDoc and cannot be modified or deleted:

- EXCHANGEit station appears to be down, but is reported as running.  
This alert should only be triggered if an EXCHANGEit station exits abnormally. For example, a computer loses power or the process ended in the task manager.
- One or more EXCHANGEit exceptions have occurred.  
EXCHANGEit has database exceptions that require user intervention to resolve.

EXCHANGEit activity alerts display in the Alerts window and appear as a red exclamation point next to the applicable station in the EXCHANGEit Activity window.

Right-click an alert in the list to access the following options:

- |                 |   |
|-----------------|---|
| Configure Alert | Opens the alert configuration to change it. See View EXCHANGEit Alert Settings (page <a href="#">88</a> ).          |
| Copy All Data   | All data that appears in the window can be copied to the Windows Clipboard and then pasted into other applications. |

- CAPTUREit Alerts

Alerts can be set to occur when a batch is older than the specified number of minutes. When creating an alert rule it is applied to all batches. CAPTUREit activity alerts display in the Alerts window and appear as a red exclamation point next to the applicable station or user in the CAPTUREit Activity window.

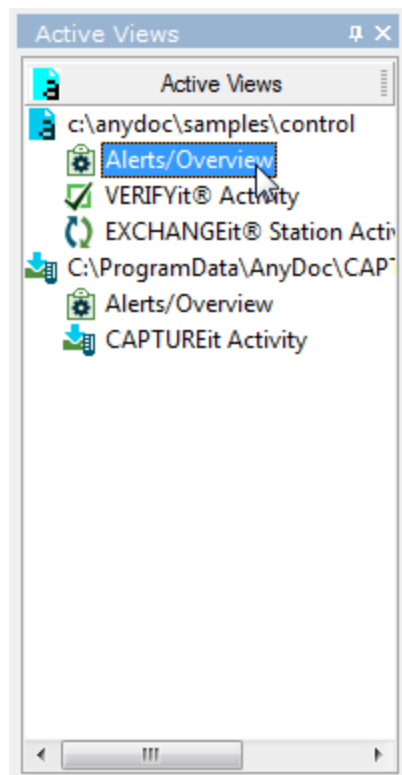
Right-click an alert in the list to access the following options:

- |                 |   |
|-----------------|---|
| Configure Alert | Opens the alert configuration to change it. See View CAPTUREit Alert Settings (page 91).                            |
| Copy All Data   | All data that appears in the window can be copied to the Windows Clipboard and then pasted into other applications. |

You have the option of displaying some or all available columns in any order via **Settings | Control Path Definition | Column Settings**. See Hide or Show Columns (page 23) and Move Columns (page 25).

## Active Views Window

The Active Views window displays all open control path definition windows, such as the Alerts window or the Pending Work window. As a new window is opened the name of the window is displayed beneath the associated control path. To quickly access a specific control path definition window, click the link in the Active Views window underneath the associated control path to open the selected window.



To close the the Active Views window, click the X icon on the Active Views window.

## User Interface

# Properties Window

The Properties window displays additional information on the item selected. Selecting a row from the list in current view displays additional information not listed in the view.

The Properties window is renamed based on the type of view that is selected.

The screenshot shows the OnBase AnyDoc interface. On the left, the 'Active Views' pane is open, displaying a list of views. The 'Station/User Activity' view is selected. Below the 'Active Views' pane, the 'Station Properties' window is open, displaying a table of properties for the selected user 'apetts'.

Property	Value
User Name	apetts
Computer ID	DOC-0
Capabilities	SIQQAXEHVCP
Version	15.0.0.12
Term. Services	No
Key	Hyland
Scanner	No scanner connected
ICR	OpenText (PSW,RecoS...
OCR	Nuance (ScanSoft)
Process	Idle
Operating System	Microsoft Windows 7 ...

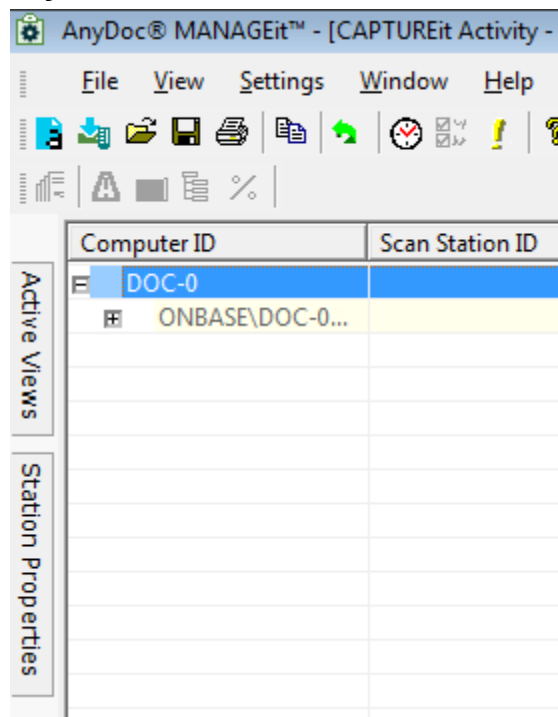
In this example, apetts is selected in the Station/User Activity view. The **Station Properties** window is displayed with additional information that is not presented in the Station/User Activity view.

# Fly Out Windows

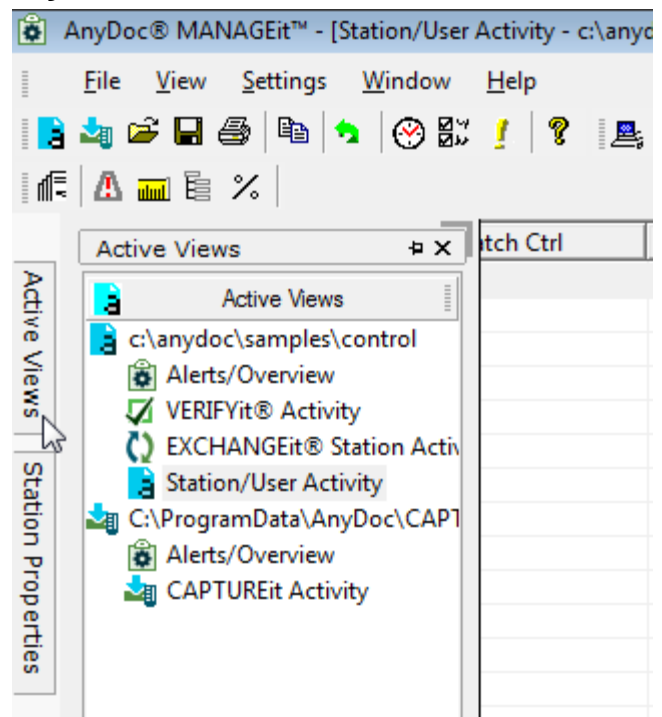
The Active Views and Properties windows are referred to as "fly out windows" because of the way they "fly" in and out of the screen. Fly out windows fly out to the interface (show) when you roll the cursor over the window label and fly in again (hide) after the window has been inactive for a few seconds.




## Fly In Window




## Fly Out Window





## Stop Fly In/Out Windows

Disable the fly out capabilities with the push pin,  that is located in the upper right-hand corner of the fly out window. Clicking the push pin shows the selected window. See Push Pins (page [23](#)).

## Push Pins

The Active Views and Properties windows have a push pin icon,  in the upper right-hand corner of the window. Push pins pin down a window to disable the "fly out" window capabilities. See Fly Out Windows (page [22](#)). You can toggle the push pin on and off to enable and disable the fly out windows.

- Fly Out Window On position:   
In the On position, the fly out windows fly in and out of the window automatically.
- Fly Out Window Off position:   
In the Off position, the windows do not fly in and out.

## Hide or Show Columns

You can choose to hide or show columns of information for the following windows:

- Alerts/Overview

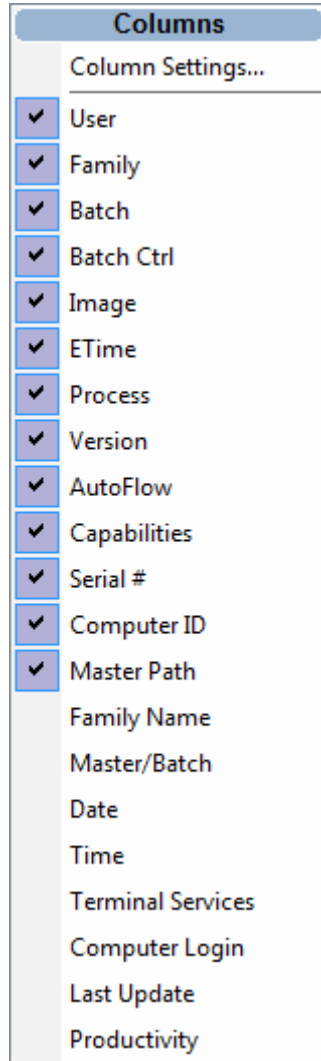
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**User Interface**

- CAPTUREit Messages
- CAPTUREit Server Activity
- CAPTUREit Server History
- EXCHANGEit Activity
- License Key Information
- Pending Work
- Station History
- Station/User Activity
- Alert History

**Steps**

- 1 Right click anywhere in the window's column heading. A menu is displayed listing the available columns with check marks next to the columns currently included in the display.



- 2 Click one or more of the column names in the list to uncheck (hide) or check (show) the column. Hiding then showing a column heading moves that column to the right most side of the window.



You can also hide/show and rearrange columns using Settings | Control Path Definition | Column Settings. See Change Columns in Control Path Definition (page [34](#)).

## Move Columns

You can rearrange columns of information for the following views in MANAGEit:

## User Interface

- Alerts
- CAPTUREit Server Activity
- CAPTUREit Messages
- EXCHANGEit Activity
- EXCHANGEit History
- License Key Date
- Pending Work
- Station History
- Station/User Activity
- VERIFYit Activity (drag and drop procedure only)

To move columns, either drag and drop the column heading to the new location, or use Settings | Control Path Definition | Column Settings to rearrange the columns. For more information, see Set Control Path General Definition Settings (page [34](#)).



Another way to move a column is to hide the column and then show it again. This moves the column to the right side of the window. For more information, see Hide/Show Columns (page [23](#)).

## Sort Column Information

Column information can be sorted by left clicking the title of the column you to sort by. For example, to sort a column in the Station/User Activity window by user, click the User column title. The column is now sorted by user name. To return the column to its original settings, click the column title again.

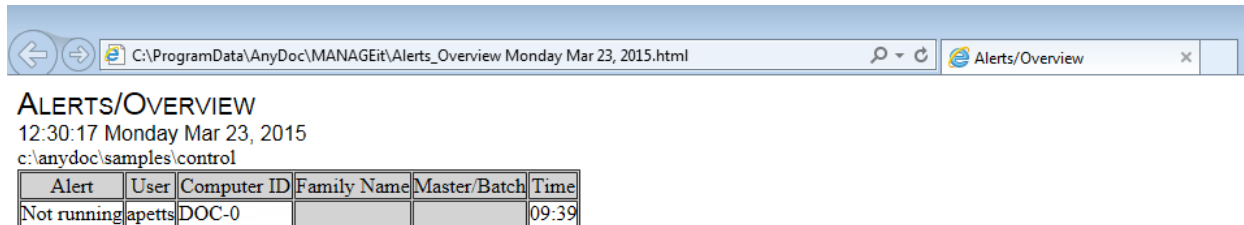
## Save a Window in HTML

Some windows in MANAGEit can be saved as HTML for archival or support purposes. These windows include:

- Alerts window
- Expired Alerts window
- Station Activity window
- Pending Work window
- CAPTUREit Activity window
- CAPTUREit History

- CAPTUREit Messages
- License Key Information

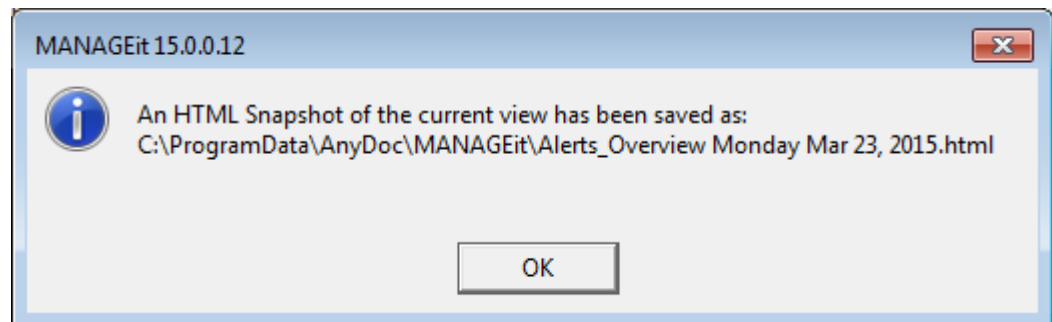
These HTML "snapshots" are saved in C:\AnyDoc\MANAGEit and are named after the save window and the current date.



### Steps

- 1 From the **Active Views** window, select the view to be saved in HTML.
- 2 Select **File | Save As Html**.

A message is displayed confirming that view has been saved in HTML, the location and file name.



## Print a Window

MANAGEit offers some special printing features for printouts of all available windows.

A typical printout shows the selected window data arranged into columns exactly as displayed on the window, with the date and time of the report appearing at the bottom for easy reference.

All active panes can be printed. When printing active windows, all non-visible areas on scrolling windows is included in the printout. You can customize the appearance of the real time reports with a selection of colors, fonts and lines.

### Steps

- 1 From the **File** menu, click **Print**.  
The **Print window** is displayed.
- 2 Select the appropriate print settings.

**User Interface**

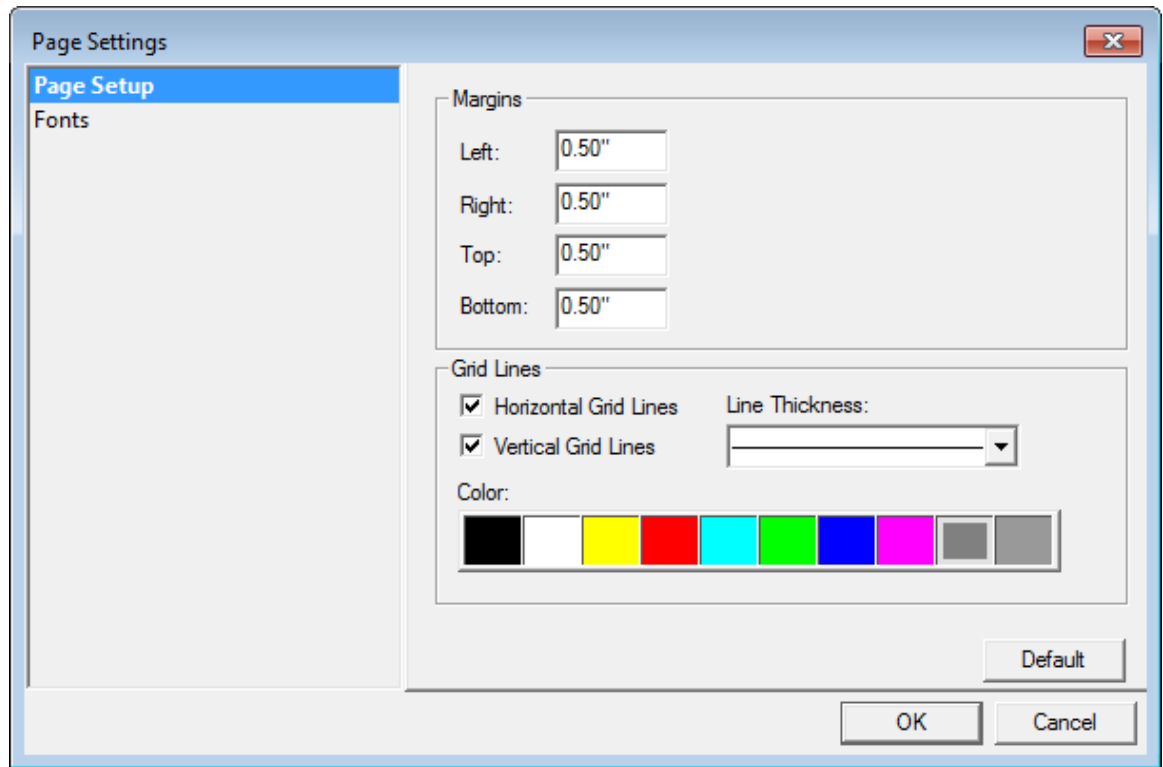
- 3 Click **OK**.

## Set Page Setup Settings

### Steps

- 1 Select **File | Page Setup**.

The **Page Settings** window is displayed.



- 2 Enter a number in the **Left**, **Right**, **Top** and **Bottom** fields to set the margins for the report. The default is .50".
- 3 Enable the **Horizontal Grid Lines** and **Vertical Grid Lines** check boxes to have grid lines appear on the report.
- 4 Select a **Line Thickness** for the grid lines from the drop down list.
- 5 Select a color for the grid lines from the color palette.
- 6 Click **OK**.

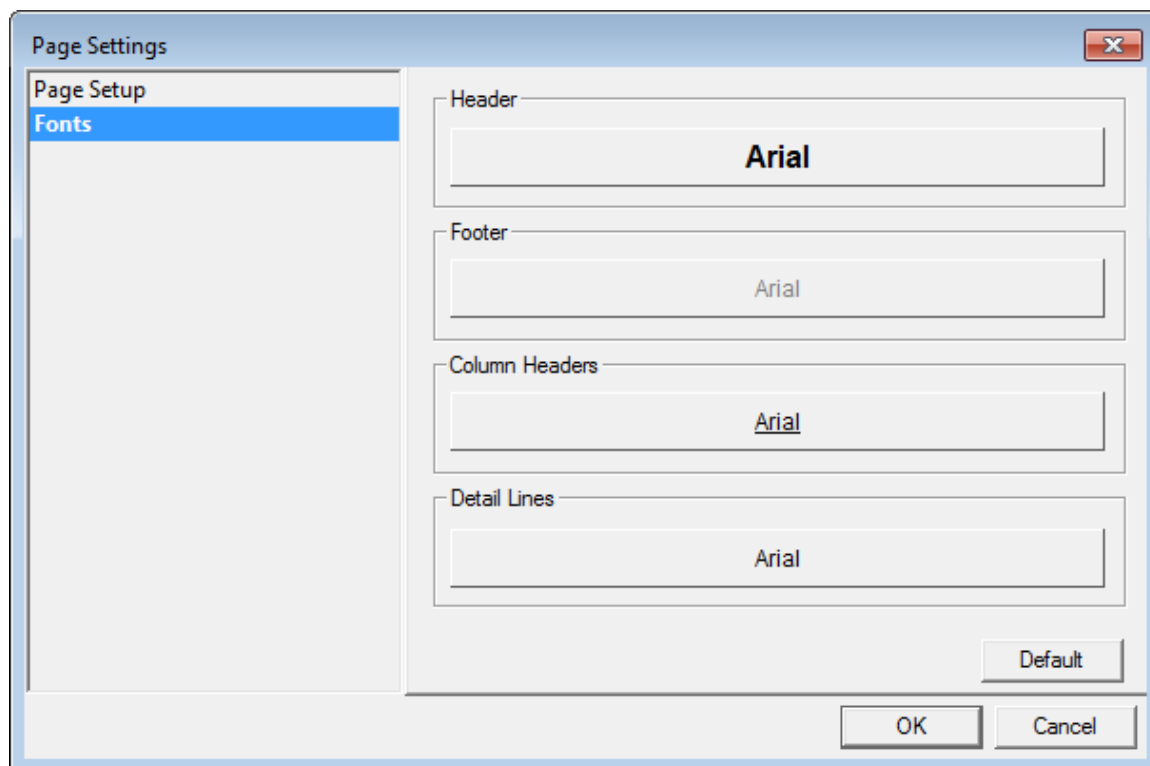
## Set Font Settings

### Steps

- 1 From the **File** menu, click **Page Setup**.

The **Page Settings** window is displayed.

- 2 Click the **Fonts** tab.



- 3 Select the fonts for the report header and footer, the column headers, and the detail lines.

The default font for all is Arial.

- 4 Click **OK**.
- 5 To view the results, click **File | Print Preview**.

# Chapter 4

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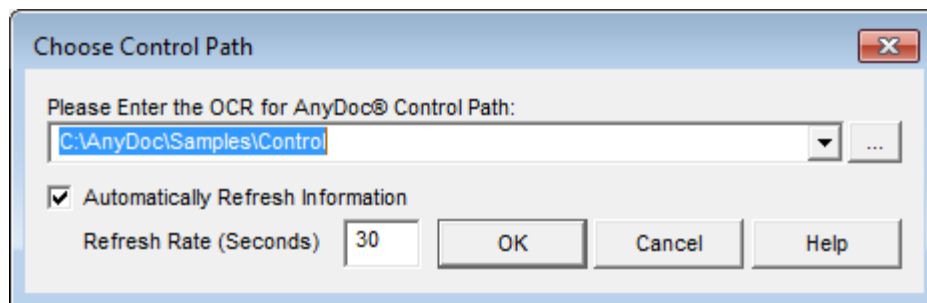
## Control Path Definitions

### Create a New Control Path Definition

#### Steps

- 1 Select **File | New | New OCR for AnyDoc Control Path**.

The **Choose Control Path** window is displayed.



- 2 Enter the OCR for AnyDoc control path.

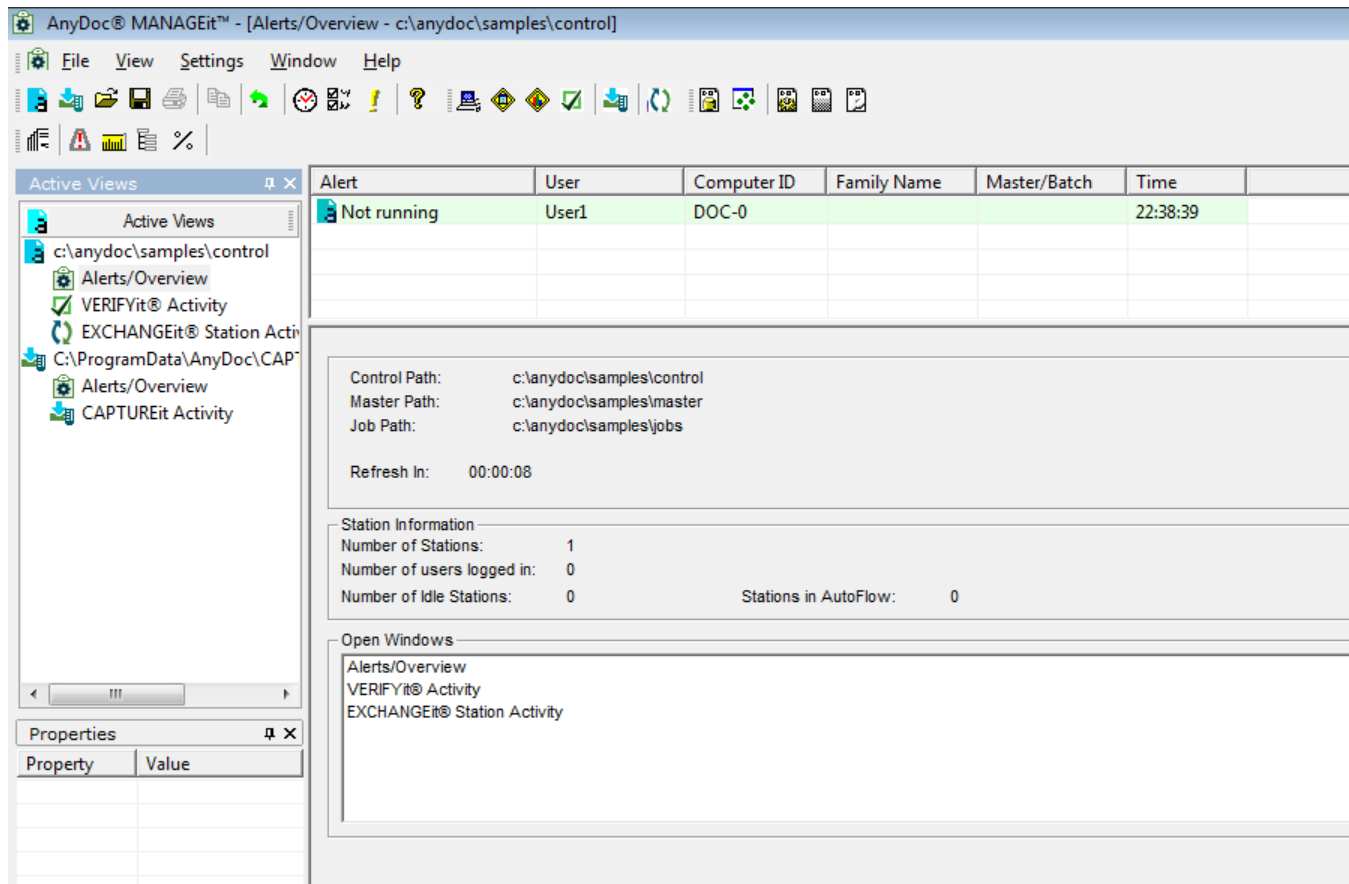
OR

Click  to browse to the location.

- 3 Enable the **Automatically Refresh Information** check box, if needed.
- 4 If the **Automatically Refresh Information** check box is enabled, enter the rate in seconds at which to refresh the information in the **Refresh Rate (Seconds)** field. The default is 30 seconds. Twenty seconds is the minimum amount of time allowed for the refresh rate.
- 5 Click **OK**.



The main MANAGEit window is displayed with the Alerts window open to the specified control path. For more information, see Alerts Window (page 18).



- 6 Select **File | Save As** to open the **Save As** window.
- 7 Enter a **File name** for the new Control Path Definition. Use this name to open the Control Path Definition in the future to monitor the specified OCR for AnyDoc installation. If you have multiple Control Path Definitions set up, the default file names are not very descriptive. The default location for saved Control Path Definition files (\*.ami) is C:\Program Data\AnyDoc\MANAGEit\Settings.

**Control Path Definitions**

## Monitor Multiple Control Paths

You can watch multiple installations from a single MANAGEit station. Multiple control paths can be open at one time (for example, X:\AnyDoc\OCR for AnyDoc\control and Y:\AnyDoc\OCR for AnyDoc\control). The applicable control path is displayed in the title bar of each monitoring window and also in the Active Views pane.

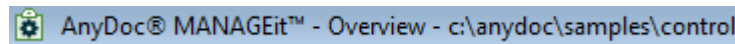


Figure 1: Title Bar Example

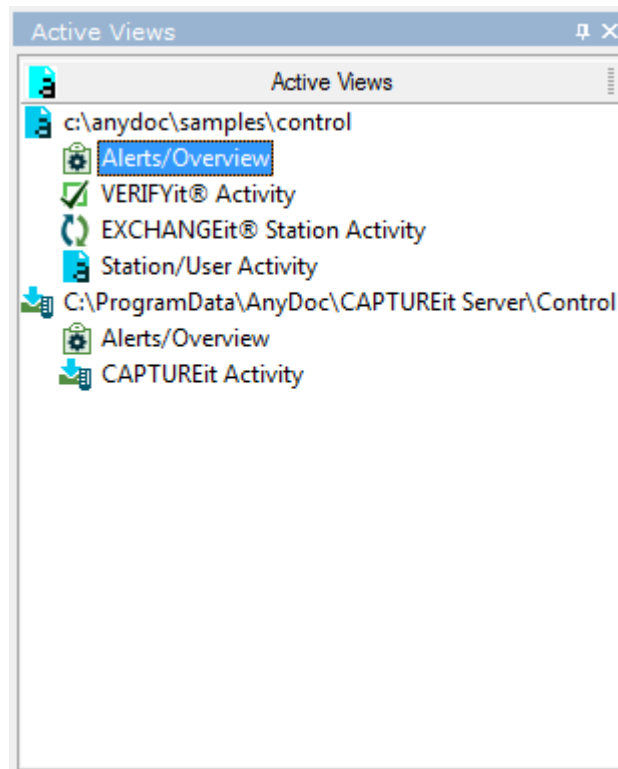


Figure 2: Views Window Example

Multiple control paths appear in the Active Views pane. If you are monitoring more than one control path at a time, the one that is displayed in the title bar of the top-most window is the active Control Path Definition. The Control Path Definition is used when requesting reports and graphs and when opening additional monitoring windows, such as Station/User Activity and Pending Work.

To switch between open control paths, click any open window for a control path to make that the active window. Notice that the control path appearing in the title bar of the Overview window changes to that path.

# Chapter 5

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## Control Path Definition Settings

The Control Path Definition settings only apply to the current Control Path. If you attempt to close MANAGEit without saving these settings, a prompt is displayed asking if you would like to save before closing.

### Set General Control Path Definition Settings

When monitoring a product that references a Control Path, the following options can be set and applied to that Control Path:

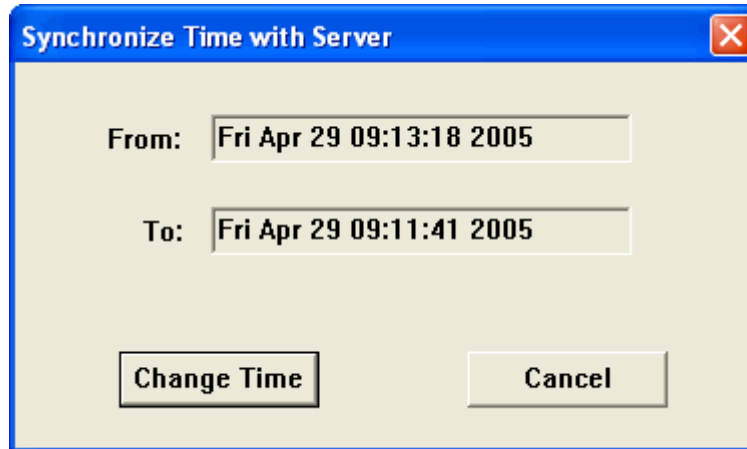
- Refresh rate
- Time synchronization
- Batch display

#### Steps

- 1 Select **Settings | Control Path Definition Settings**. The **Control Path Definition Settings** window is displayed.
- 2 Click the **General** tab.
- 3 To allow MANAGEit to immediately detect changes made to form families and station activity, select the **Detect Station/Family Changes Dynamically** check box.  
  
Selecting this option allows MANAGEit to dynamically update information without relying on the timer for its refreshing.
- 4 Select the **Refresh Information Every** check box, if needed.
- 5 Enter the number of seconds in the **Refresh Rate (Seconds)** field if the **Refresh Information Every** check box is selected. The default is 30 seconds.
- 6 Select the **System Time** options to select time synchronization with the server.

## Control Path Definition Settings

You can select one option, both options, or neither option. The **Synchronize With Server on Open** check box is selected by default. When the **Synchronize With Server on Open** check box is selected, if the time on your PC is different than the server time, you are prompted to synchronize when you open the Control Path Definition.



- 7 Click **OK**.

## Set General CAPTUREit Server Definition Settings

When monitoring CAPTUREit independent of OCR for AnyDoc, the CAPTUREit database's refresh rate must be specified. For more information, see [Create a New CAPTUREit® Server Definition](#) (page [65](#)).

### Steps

- 1 In the Active Views window, select a CAPTUREit Server Definition.
- 2 Select **Settings | Monitoring Settings**. The **Monitoring Settings** window is displayed.
- 3 Click the **General** tab.
- 4 Enter the number of seconds in the **Refresh Time** field.  
The default is 30 seconds.
- 5 Click **OK**.

## Set Column Settings

### Steps

- 1 Select an OCR for AnyDoc Control Path Definition or a CAPTUREit Server Definition in the Active Views window.
- 2 Open the settings window:

- For an OCR for AnyDoc Control Path Definition, select **Settings | Control Path Definition Settings**. The **Control Path Definition Settings** window is displayed.
  - For a CAPTUREit Server Definition, select **Settings | Monitoring Settings**. The **Monitoring Settings** window is displayed.
- 3 Click the **Column Settings** tab.
  - 4 Select a window from the **View** drop-down list.
  - 5 Perform one of the following actions:
    - Select one or more of the check boxes to show the column.
    - Disable check boxes to hide the column.
    - Click the **Hide/Show** button on the right to toggle between **Hide** and **Show**. The check box for the selected column is selected or deselected.
  - 6 To change the order of the columns, click a column name in the list, then use the **Move Up**, **Move Down**, **Move Top** or **Move Bottom** button to reorder it.
  - 7 Click **OK**.

## Set Pending Work Display Settings

In the **Control Path Definition Settings | Pending Work** tab, you can set defaults for the **Pending Work** window. Additionally, you can choose how batches are identified by selecting an option in the **Control Path Definition | General | Display Batches By** section. See Set General Monitor Settings (page [33](#)).

### Steps

- 1 Select **Settings | Control Path Definition Settings**. The **Control Path Definition Settings** window is displayed.
- 2 Click the **Pending Work** tab.
- 3 Enable the **Hide Form Families With No Pending Work** check box, if needed  
OR  
Disable the check box to display all form families whether they have pending batches or not. If the check box is enabled, form families with no batches but do contain images available for import are displayed.
- 4 Select the **Automatically Expand Families to Show Pending Batches** check box, if needed.
- 5 Select the **Automatically Expand Totals Line** check box to automatically expand the Totals line to display all batches by batch ID when the Pending Work window opens. This feature is only available if the **Automatically Expand Families to Show Pending Batches** check box is selected.

## Control Path Definition Settings

- 6 In the **Show Counts For** section, specify how pending work information is displayed. Options include:
  - **Images**  
All counts are shown as number of images.
  - **Document Sets**  
All counts are shown as number of document sets.
  - **Images and Document Sets**  
Both number of images and number of document sets are displayed. When images and document sets are displayed together, the number of docsets appear in parentheses.
- 7 Click **OK**.

## Set Station/User Activity View Settings

The Station/User Activity window can be customized to display all or some of the columns in any order. For more information, see [Customize the User Interface \(page 18\)](#).

Other than controlling how columns appear in the Station/User Activity window, additional options can be set to control how and which stations appear in Station Activity, such as:

- Set the default station sort order
- Set the station alert sort order
- Filter out stations with no recent activity



These sorting options are also configurable from a menu displayed by right clicking on a station/user. For more information, see [Station/User Activity Options \(page 47\)](#).

Additionally, you can choose how batches are identified in Station/User Activity by selecting the **Display Batches By** option in the **Control Path Definition Settings | General** tab. For more information, see [Change General Monitoring Settings \(page 33\)](#).

### Steps

- 1 Select **Settings | Control Path Definition Settings**. The **Control Path Definition Settings** window is displayed.
- 2 Click the **Station Activity** tab.
- 3 Select the **Move Alerts to the Top** check box to move stations with an alert to the top of the list in the Station/User Activity window.
- 4 Select the **Organize by Product** check box to arrange the display by product.

- 5 Select the **Ignore Stations That Have Had No Change in Their Status for (Days)** check box, if needed. The default number of days is fourteen. You can enter a different number of days, or disable the option to see all stations in Station/User Activity, regardless of whether the status has changed.
- 6 Click **OK**.

## Set CAPTUREit Settings

Filter out stations with no recent activity.

### Steps

- 1 Select an OCR for AnyDoc Control Path Definition or a CAPTUREit Server Definition in the Active Views window.
- 2 Open the settings window:
  - For an OCR for AnyDoc Control Path Definition, select **Settings | Control Path Definition Settings**. The **Control Path Definition Settings** window is displayed.
  - For a CAPTUREit Server Definition, select **Settings | Monitoring Settings**. The **Monitoring Settings** window is displayed.
- 3 Click the **CAPTUREit** tab.
- 4 Select the **Ignore Stations That Have Had No Change in Their Status for (Days)** check box, if needed.

The default number of days is fourteen. You can enter a different number of days, or clear the option to see all stations, regardless of whether the status has changed.
- 5 Click the **OK** button.

## Set Metered Key Settings

After a hardware licensing key is replaced in MANAGEit, the old key can be removed from the monitoring list by selecting the appropriate option on this tab.

### Steps

- 1 Select **Settings | Control Path Definition Settings**. The **Control Path Definition Settings** window is displayed.
- 2 Click the **Metered Keys** tab.
- 3 To hide keys that were replaced, select the **Filter Out Replaced Keys** check box.
- 4 To hide keys that expired more than 45 days ago, select the **Filter Out Keys That Are More Than 45 Days Past Expiration Date** check box.
- 5 Click **OK**.

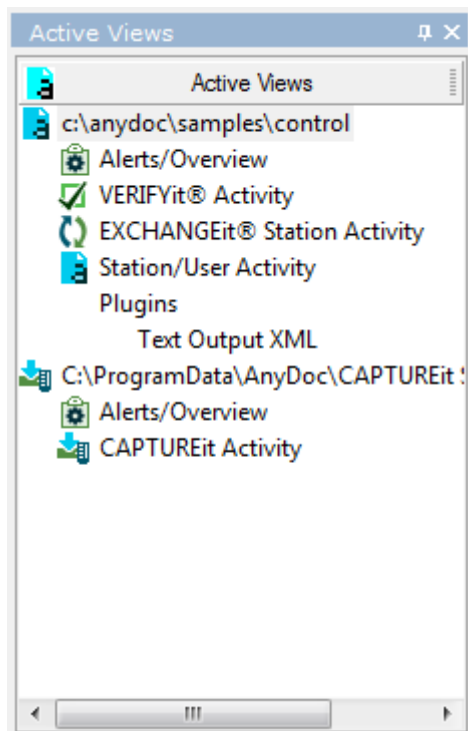
**Control Path Definition Settings**

## Set Plugin Settings

Plugins are user created DLL files that extend specific functionality in MANAGEit.

### Steps

- 1 Select **Settings | Control Path Definition Settings**. The **Control Path Definition Settings** window is displayed.
- 2 Click the **Plugins** tab.
- 3 Activate plugins by selecting the check box to the left of the plugin's name. When a plugin is selected that plugin is displayed in the Active Views window.



- 4 To create a log of plugin information, select the **Enable Plugin Trace File** check box.

When this check box is selected, the path where the trace file is saved is displayed at the bottom of the window under Trace Path. Information gathered in this trace file can be used by developers to create additional plugins or could be requested by AnyDoc Technical Support department. For more information, see MANAGEit Plugins (page [418](#)).

- 5 Click **OK**.



## Set Infiniworx Connection Settings

Infiniworx metered license keys can be monitored by creating a connection string to the Infiniworx production database. The Infiniworx license information is displayed in the Licensing Information Window.

### Steps

- 1 Select **Settings | Control Path Definition Settings**. The **Control Path Definition Settings** window is displayed.
- 2 Click the **Infiniworx** tab.
- 3 Click **Configure Connection String** to open the **Data Link Properties** window.
- 4 On the **Connection** tab, enter the connection string information for the Infiniworx production database that was configured during the Infiniworx installation.  
The **Connection tab** options vary according to the Provider selected.
- 5 Click **Test Connection** to test whether the data source connection has been accurately configured. If the connection is successful, a **Test connection succeeded** message appears.
- 6 Click **OK**.
- 7 Click **OK**.

# Chapter 6

---

## Monitoring

MANAGEit can monitor OnBase AnyDoc products as well as database tables in external applications.

When MANAGEit monitors OnBase AnyDoc products it should be understood that MANAGEit doesn't directly monitor each product individually. MANAGEit monitors the Control Path that all AnyDoc products point to.

### Monitor OCR for AnyDoc

MANAGEit provides real time monitoring of stations running OCR for AnyDoc and VERIFYit. Monitoring functions provide the administrator with the information needed to produce the highest capacity of work from the station operators. MANAGEit allows you to monitor the following for all OCR for AnyDoc stations:

- Pending Work: Provides an overview of the status of all work in progress, including images pending import. See Monitor Pending Work (page [59](#)).
- Station Activity: Displays current information such as the user, form family used, batch and job processed and amount of time elapsed since processing. See Monitor Station/User Activity (page [43](#)).

To monitor OCR for AnyDoc the following requirements must be met:

- OCR for AnyDoc version 3.1.5x or higher must be installed.
- OCR for AnyDoc version 3.1.68 or higher must be installed for the option to start/stop AutoFlow when running reports.
- OCR for AnyDoc version 3.2 or higher must be installed for using the following:
  - Batches by batch control number (user assigned),
  - Batch elapsed time for Pending Work and
  - Batch time exceeded for a Pending Work alert

## OCR for AnyDoc Environments

MANAGEit is designed to monitor an entire OCR for AnyDoc installation from a single station. The following figures illustrate two of the possible configurations for networks with a dedicated MANAGEit station.

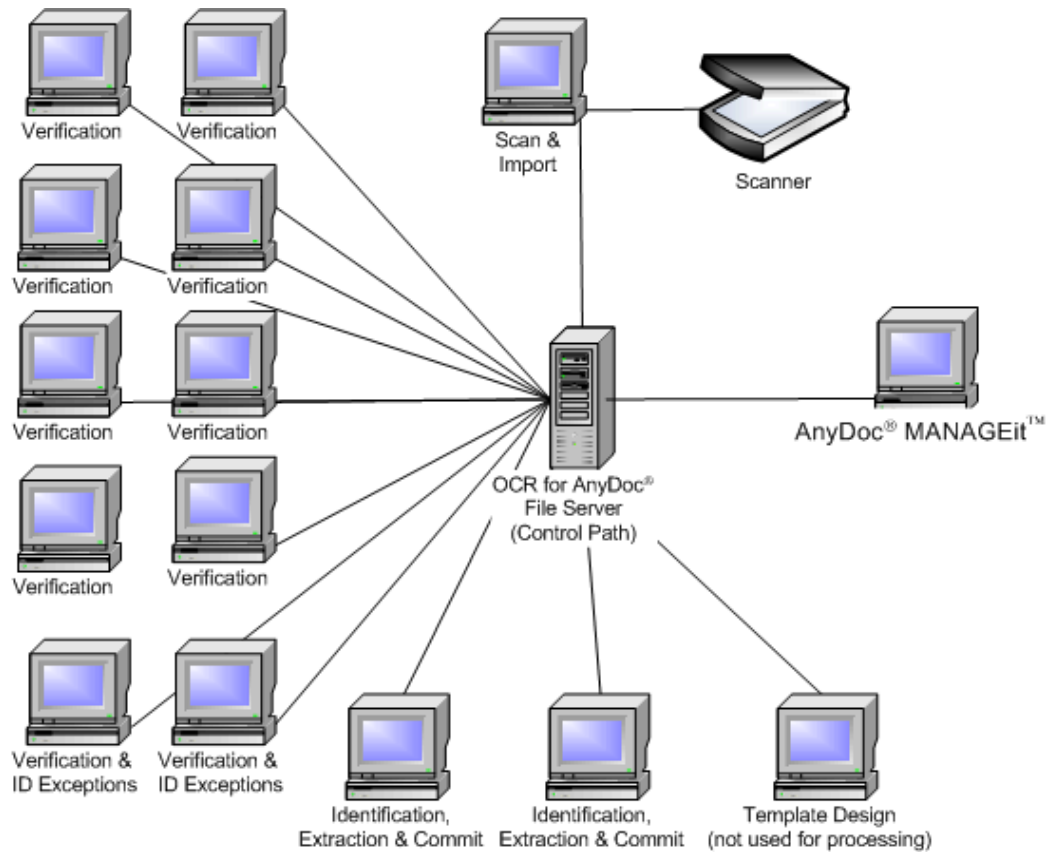


Figure 3: OCR for AnyDoc and MANAGEit in a network with onsite Verification

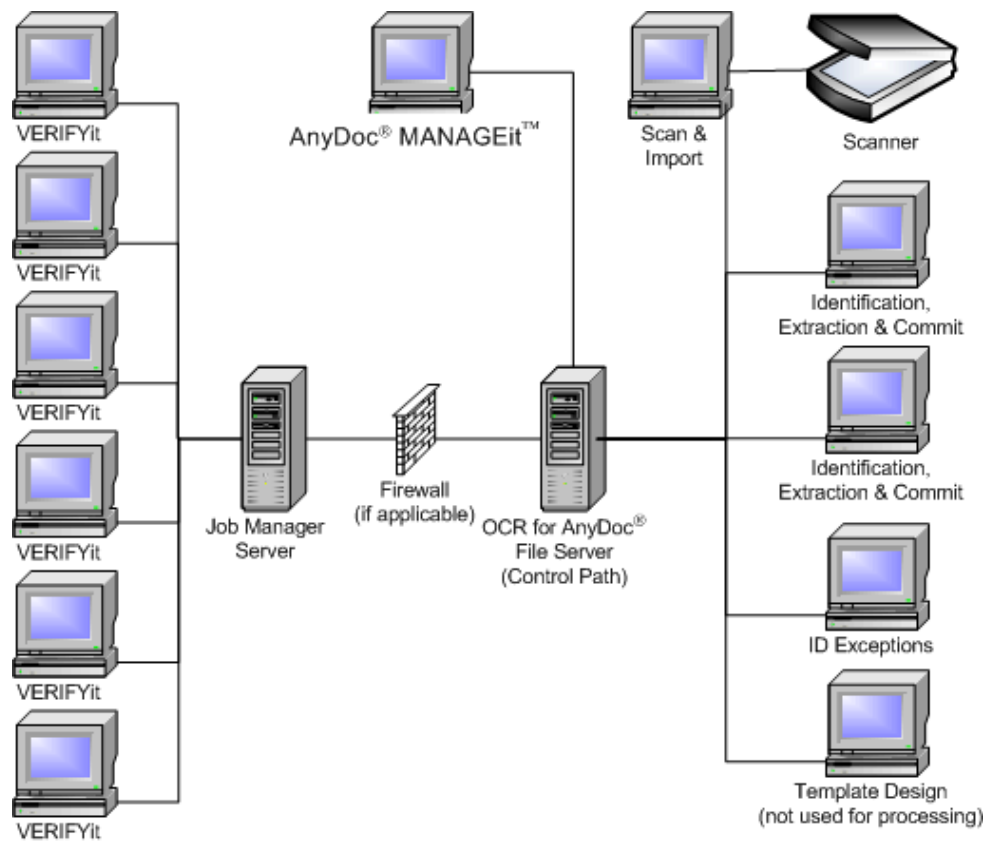
**Monitoring**

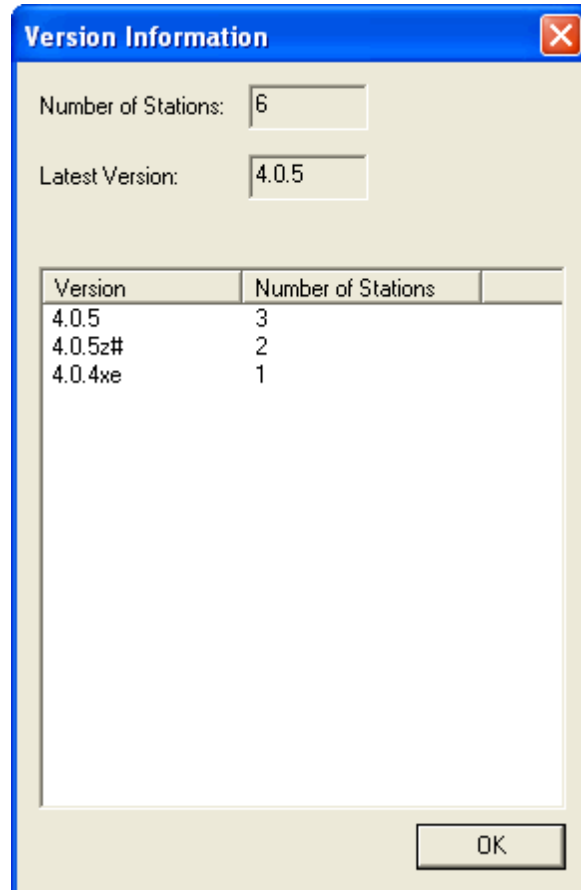
Figure 4: OCR for AnyDoc and MANAGEit in a network with offsite Verification

## View OCR for AnyDoc Version Information

One type of alert that appears in the Alert window states "One or more OCR for AnyDoc stations has a mismatched version." It is recommended that you run the same software version on all stations. If you see this alert, you can display the number of stations in the current control path running each software version.

### Steps

- 1 In the Alert Settings window, right click the alert in the list and select **More Information**. The Version Information window is displayed listing the version numbers and the number of stations running each version in the OCR for AnyDoc network.



- 2 Click **OK**.
- 3 Open the **Station Activity** window to determine which stations are running which version. For more information, see Monitor Station/User Activity (page [43](#)).


## View Station/User Activity

The Station/User Activity window provides a snapshot of status and activity for each station and user in the OCR for AnyDoc and in the VERIFYit environment for the selected control path. In addition, right clicking on each station or user listed brings up a menu that enables you to perform various station/user activity functions. See Performing Station/User Activity Functions (page [47](#)).

### Steps

- 1 Select **View | Station/User Activity**  
OR

**Monitoring**

Click the **View Station Activity** button, 

OR

Type [Ctrl+2]. The **Station/User Activity** window is displayed.

The Station/User Activity window provides the following status and activity information for each station and user in the OCR for AnyDoc and VERIFYit installation.

Column	Description
User	The user from the login at each station. If the workstation is running OCR for AnyDoc as a service, the word "Service" is displayed here.
Family	The OCR for AnyDoc form family currently processed by the station.
Batch	The batch in progress.
Batch Control	The user-assigned batch control number.
Image	The image being processed.
ETime	The elapsed time spent on the current activity.
Process	The station's current processing activity, such as Import, Quality Assurance, Auto ID, ID Exceptions, Data Extraction, Verification, Auditor, EXCHANGEit Exceptions, and Commit.
Version	The OCR for AnyDoc or VERIFYit version number of the station.
AutoFlow	The batch processing phases configured for AutoFlow. See <a href="#">Configure a User's AutoFlow</a> (page 51).
Capabilities	The process(es) each station is authorized to perform based on the station's hardware key. This column is turned off by default.
Serial #	The serial number of the hardware key. This column is turned off by default.
Computer ID	The name of the computer (as configured in Windows). This column is turned off by default. For stations running under terminal services, this column shows Server ID/Client Station ID.
Master Path	OCR for AnyDoc master path configured for this station. Currently, all stations point to the same master path. This column is turned off by default.
Family Name	The form family description. This column is turned off by default.
Master/Batch	The master template name. This column is turned off by

Column	Description
	default.
Date	The date of the last status change on this station, such as Idle or Starting. This column is turned off by default.
Time	The time of the last status change on this station, such as Idle or Starting. This column is turned off by default.
Terminal Services	Whether or not the workstation is running under terminal services, Yes or No. If multiple terminal services servers are running, terminal services are listed by server and then user name. This column is turned off by default.
Computer Login	The computer login name, which could be different than the OCR for AnyDoc or VERIFYit login shown in the User column. This column is turned off by default.
Last Update	The last time OCR for AnyDoc updated MANAGEit for this user
Productivity	The percentage of work completed by the current user for the day. This column is turned off by default.

This window can be customized to display all or some of the columns in any order. See [Customize the User Interface](#) (page 18).

There are two types of graphic symbols that can appear to the left of the user, state and station type. One symbol of each type, up to a total of two, can appear beside each station and user listed.

#### State



An alert has occurred. The user name is displayed in red



Station in AutoFlow



Station in AutoFlow has an alert

#### Station Type



OCR for AnyDoc station



VERIFYit station

The Station/User Activity AutoFlow and Capabilities columns display information about the OCR for AnyDoc batch processing phases using the abbreviations listed in the table.

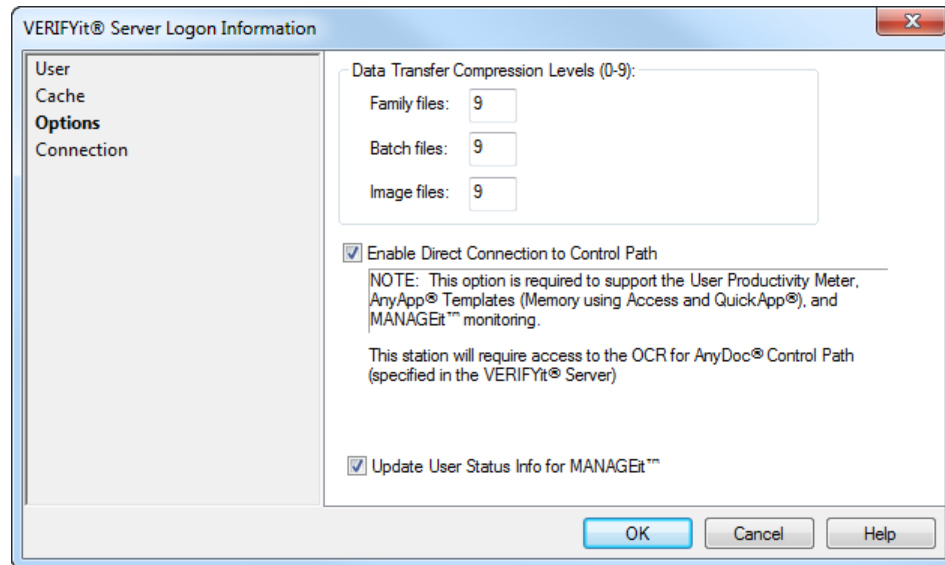
Phase Name	AutoFlow Column Abbreviation	Capabilities Column Abbreviation
Scan	Not applicable	S

**Monitoring**

<b>Phase Name</b>	<b>AutoFlow Column Abbreviation</b>	<b>Capabilities Column Abbreviation</b>
Import	IM	I
Quality Assurance	QA	Q
Rescan	RS	Not applicable
Review	RV	Not applicable
Auto ID	ID	A
ID Exceptions	IX	X
Extract	EX	E
High Speed Verification	HS	H
Rules Validation	RO	Not applicable
Verify - Pass 1	V1	V
Verify - Pass 2	V2	V
Verify - Supervisor	VS	V
Verify - Balancing	BA	Not applicable
Verify - Auditor	VA	V
EXCHANGEit Exceptions	EI	P
Pending Infiniworx	IN	Not applicable
Commit	BC	C

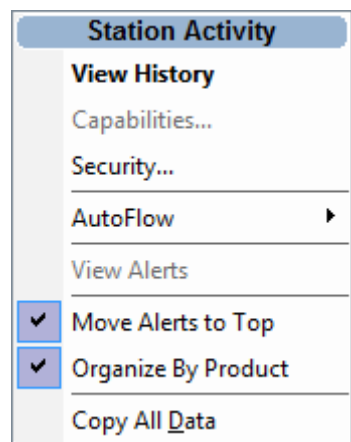


To view VERIFYit stations using MANAGEit, you must enable them in VERIFYit via **File | Logon | Options**. Select the **Enable Direct Connection to Control Path** and **Update User Status Info for MANAGEit** check boxes. VERIFYit stations must be connected to the network and be on the selected control path to be monitored via MANAGEit.



## Station/User Activity Options

Right-click a station or user in the **Station/User Activity** window to display the **Station Activity** menu, which allows you to perform various functions related to that specific user or workstation.



The following options are available on the **Station Activity** menu:

- View History  
For more information, see View Station History (page [48](#)).

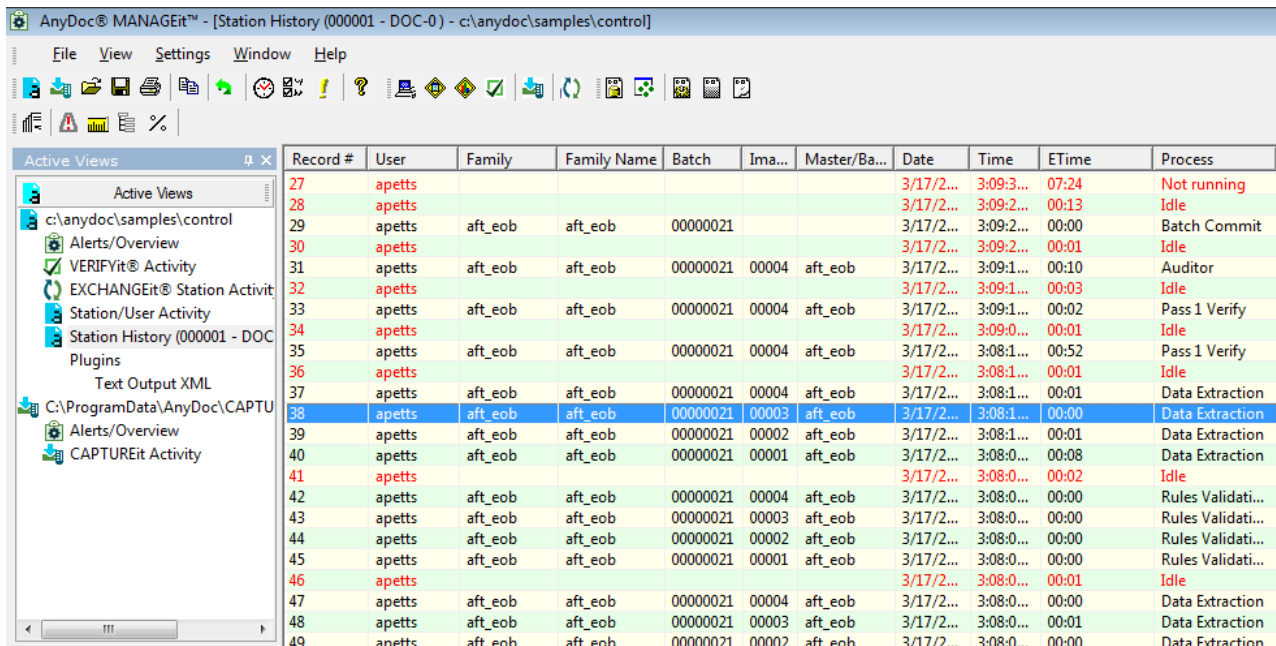
## Monitoring

- Capabilities  
For more information, see View Station Capabilities (page 49).
- Security  
For more information, see User Security. (page 49)
- AutoFlow  
For more information, see Configure a User's AutoFlow (page 51), Start or Stop AutoFlow on a Selected Station (page 57), and Start or Stop AutoFlow on All Stations (page 58).
- View Alerts
- Move Alerts to Top
- Organize By Product
- Copy All Data

## View History

The View History option opens the Station History window with the last 1000 entries in the station's history log. Each entry specifies a change in the status of the station such as logging in or out, or starting or stopping an OCR for AnyDoc batch processing phase.

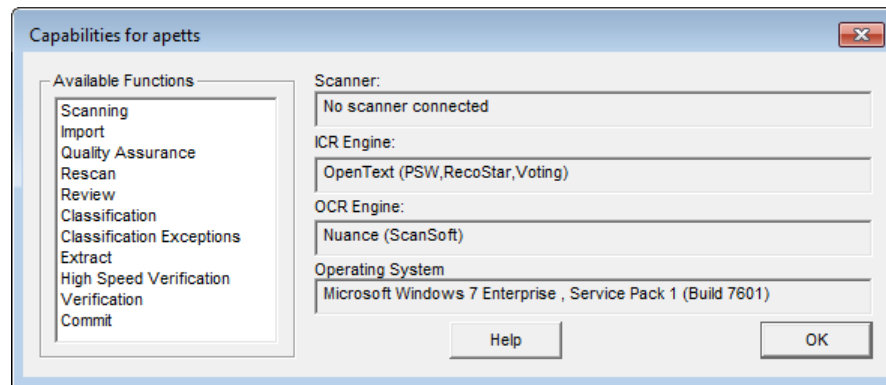
Black text indicates normal status, while red text indicates an alert on that station.



Record #	User	Family	Family Name	Batch	Image	Master/Batch	Date	Time	ETime	Process
27	apetts						3/17/2...	3:09:3...	07:24	Not running
28	apetts						3/17/2...	3:09:2...	00:13	Idle
29	apetts	aft_eob	aft_eob	00000021			3/17/2...	3:09:2...	00:00	Batch Commit
30	apetts						3/17/2...	3:09:2...	00:01	Idle
31	apetts	aft_eob	aft_eob	00000021	00004	aft_eob	3/17/2...	3:09:1...	00:10	Auditor
32	apetts						3/17/2...	3:09:1...	00:03	Idle
33	apetts	aft_eob	aft_eob	00000021	00004	aft_eob	3/17/2...	3:09:1...	00:02	Pass 1 Verify
34	apetts						3/17/2...	3:09:0...	00:01	Idle
35	apetts	aft_eob	aft_eob	00000021	00004	aft_eob	3/17/2...	3:08:1...	00:52	Pass 1 Verify
36	apetts						3/17/2...	3:08:1...	00:01	Idle
37	apetts	aft_eob	aft_eob	00000021	00004	aft_eob	3/17/2...	3:08:1...	00:01	Data Extraction
38	apetts	aft_eob	aft_eob	00000021	00003	aft_eob	3/17/2...	3:08:1...	00:00	Data Extraction
39	apetts	aft_eob	aft_eob	00000021	00002	aft_eob	3/17/2...	3:08:1...	00:01	Data Extraction
40	apetts	aft_eob	aft_eob	00000021	00001	aft_eob	3/17/2...	3:08:0...	00:08	Data Extraction
41	apetts						3/17/2...	3:08:0...	00:02	Idle
42	apetts	aft_eob	aft_eob	00000021	00004	aft_eob	3/17/2...	3:08:0...	00:00	Rules Validati...
43	apetts	aft_eob	aft_eob	00000021	00003	aft_eob	3/17/2...	3:08:0...	00:00	Rules Validati...
44	apetts	aft_eob	aft_eob	00000021	00002	aft_eob	3/17/2...	3:08:0...	00:00	Rules Validati...
45	apetts	aft_eob	aft_eob	00000021	00001	aft_eob	3/17/2...	3:08:0...	00:00	Rules Validati...
46	apetts						3/17/2...	3:08:0...	00:01	Idle
47	apetts	aft_eob	aft_eob	00000021	00004	aft_eob	3/17/2...	3:08:0...	00:00	Data Extraction
48	apetts	aft_eob	aft_eob	00000021	00003	aft_eob	3/17/2...	3:08:0...	00:01	Data Extraction
49	apetts	aft_eob	aft_eob	00000021	00002	aft_eob	3/17/2...	3:08:0...	00:00	Data Extraction

## View Station Capabilities

The Capabilities option displays the available batch processing options on the station's hardware key. In addition, the configured scanner, OCR engine, ICR engine, and operating system are displayed.



## User Security

The User Security window provides the ability to define access permissions to specific functions and menus within OCR for AnyDoc and VERIFYit for each user and default settings that can be applied to new users when they are added.

### Steps

- 1 Select **Settings | OCR for AnyDoc User Administration | User Security**  
OR

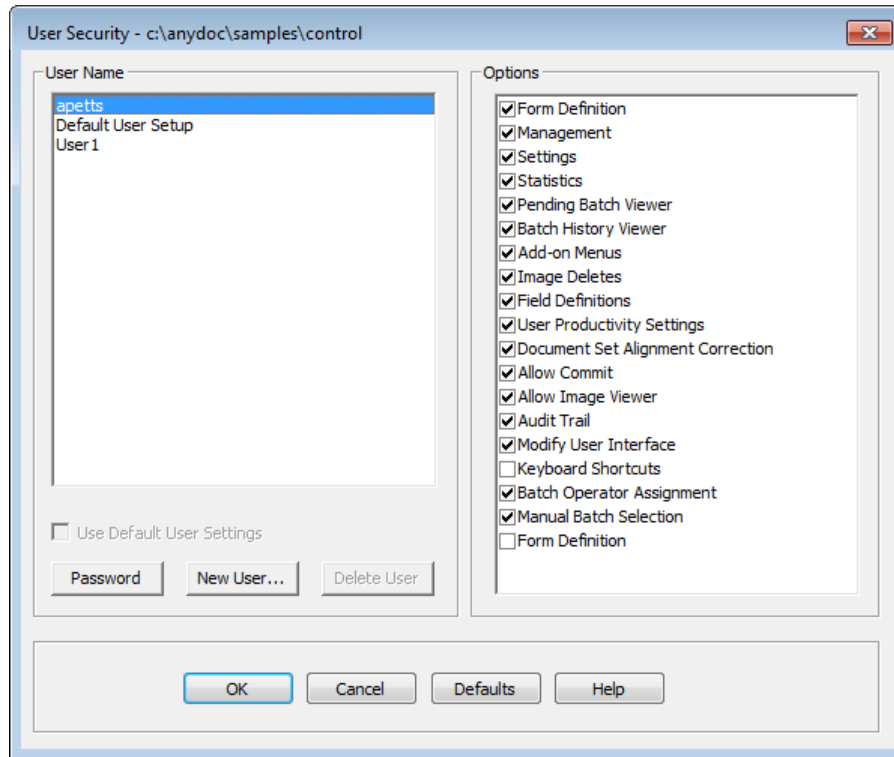
Click the **User Security** button,  on the Management toolbar.

OR

Right-click a user from the Station/User Activity window and select **Security**.

**Monitoring**

The **User Security** window is displayed.

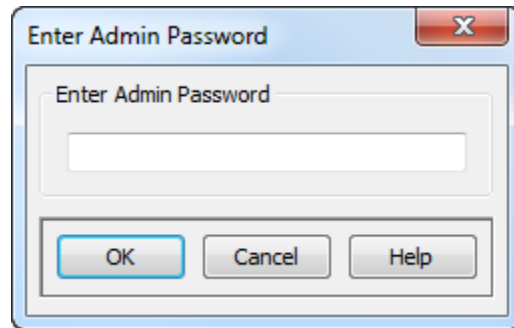


- 2 To modify a user's security options, select a user from the **User Name** field and enable or disable security check boxes in the **Options** section. Options include:
  - **Form Definition:** Allows creating and altering templates
  - **Management:** Allows access to the Management menu
  - **Image Deletes:** Allows the user to delete images during batch processing
  - **Batch History:** Allows access to the Batch History window
  - **User Productivity Settings:** Allows access to the User Productivity window
  - **Document Set Alignment Correction:** Ability to create or change document set alignment in the View Images window
  - **Field Definitions:** Allows the user to create, delete and edit field definitions
  - **Settings:** Allows access to the Settings menu.
  - **Batch Pending:** Allows access to the Batch Viewer window.
  - **Add-On Menus:** Allows access to any user defined add-on menus
  - **Statistics:** Allows access to the Statistics menu



Make sure that at least one user has access to all features.

- 3 Click **Password**. The **Enter Admin Password** window is displayed.



- 4 Enter the password into the **Enter Admin Password** field. The password can only be eight (8) characters in length.
- 5 Click **OK**. You are prompted to reenter the admin password.
- 6 Reenter the password into the **Reenter Admin Password** field and click **OK**. The password is saved and must be entered each time the User Security menu item is accessed.
- 7 Click **New User** to create an additional user. The **Create New User** window is displayed.
- 8 In the **User Name** field, enter the user's Windows or network user name.
- 9 In the **Inherit Settings From** drop-down list, select either **Default User Setup** or another user's security profile. The new user inherits the selected security profile. This can be useful when adding new users who need the same security rights.
- 10 Click **OK** to create the new user.
- 11 After security has been set for all users, click **OK** to exit the **User Security** window.

### Configure a User's AutoFlow

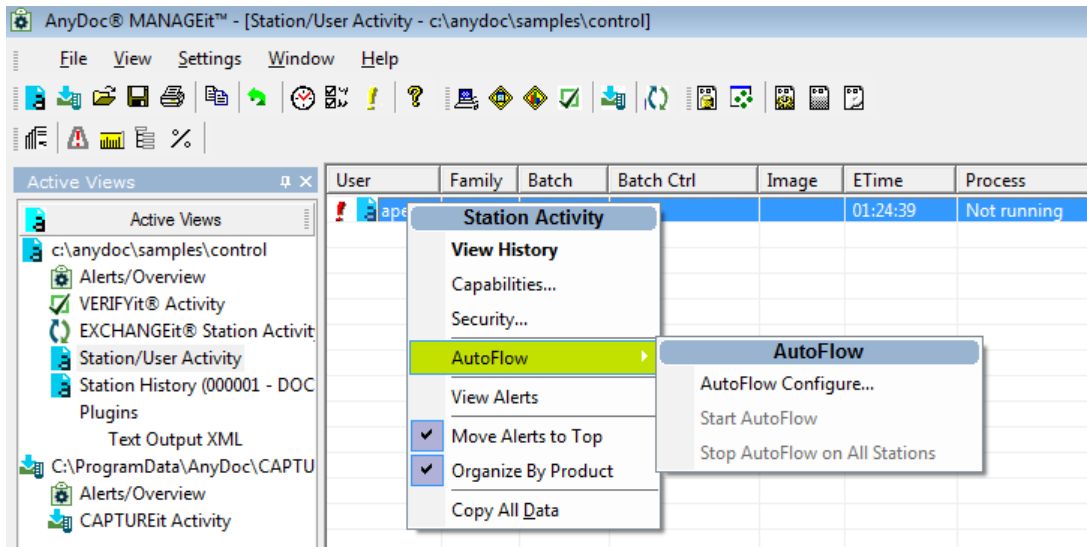
The AutoFlow function allows you to configure OCR for AnyDoc to automatically poll the network for batches and images to process. This applies even to manned workstations. For example, if a Verification workstation is running AutoFlow, images to Verify keep appearing automatically as long as there are images to process (according to the user's assigned form families, etc.). AutoFlow configuration is set at the user name level rather than the workstation, so if a user logs on to a different workstation than usual, the AutoFlow settings are the same.

After configuring AutoFlow, you must then start it for it to take effect. See [Start or Stop AutoFlow on a Selected Station](#) (page 57).

### Steps

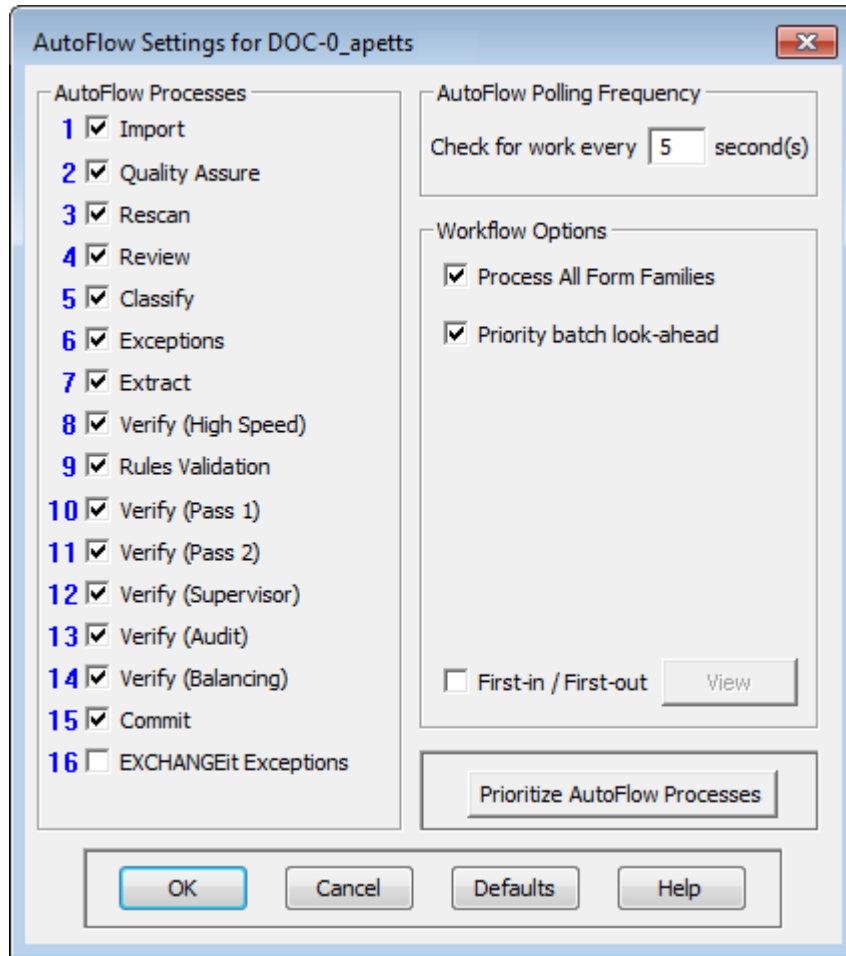
**Monitoring**

- 1 Right-click the selected station or user in the Station/User Activity window to display the menu.



- 2 Select **Autoflow** | **AutoFlow Configure**.

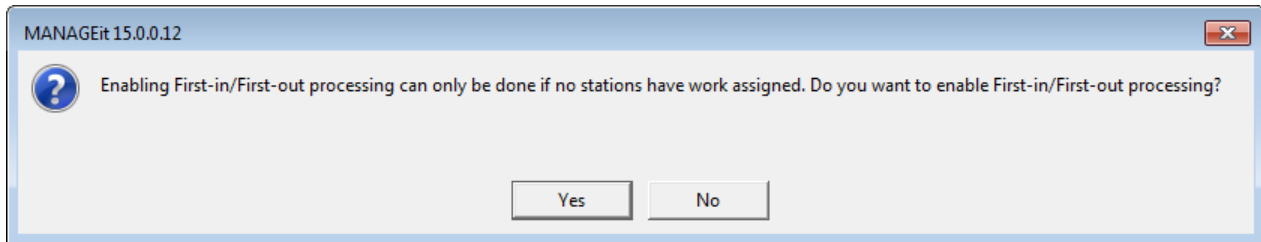
The **AutoFlow Settings** window is displayed.



- 3 Select the phase check boxes in the **AutoFlow Processes** section to run these phases automatically when AutoFlow runs. The numbers on the left indicate the priority that each phase is given during processing.
- 4 Enter a number in the **Check for work every \_\_\_\_ second(s)** field to set how often the station polls the server for batches to process. If the value is set too low, continuous polling of the network by many workstations can slow all stations.
- 5 Select the Process **All Form Families** check box to process batches for all form families shown in the Workflow Manager during AutoFlow  
OR  
Disable the check box to process batches for the currently highlighted form family in the Workflow Manager.
- 6 Select the **Priority batch look-ahead** check box to have the station search for prioritized batches to process first.
- 7 Select the **Display Processing Buttons** check box to have the processing buttons appear on the right side of the Workflow Manager.

**Monitoring**

- 8 Select the **First-in / First-out** check box to process the oldest batch first through all phases, regardless of form family  
OR  
Disable the check box to process work by form family.  
If you select this check box, a message is displayed.



If no stations currently have work assigned, click **Yes** to continue. When you click OK to exit the AutoFlow Settings window, OCR for AnyDoc runs through the available batches to establish the processing order. See First-in / First-out (page [54](#)).

- 9 Click the **View** button to open the First-in / First-out Batch Processing Order window that shows the order in which the batches are processed.
- 10 Click the **Prioritize AutoFlow Processes** button to change the relative priority of the batch processing phases in AutoFlow. See Prioritize AutoFlow Processes (page [56](#)).
- 11 Click **OK**.

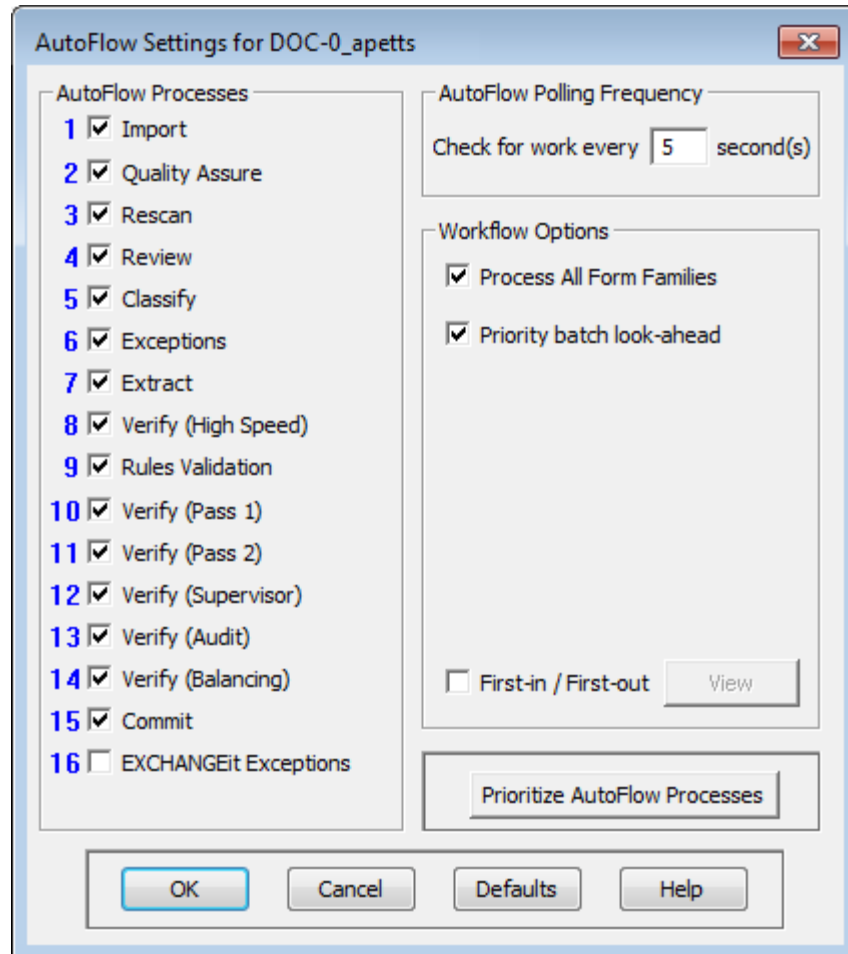
**First-in / First-out**

If the First-in / First-out check box is enabled, AutoFlow processes the oldest batches first (through all phases), regardless of form family. Otherwise, AutoFlow processes work by form family. FIFO imposes the following restrictions:

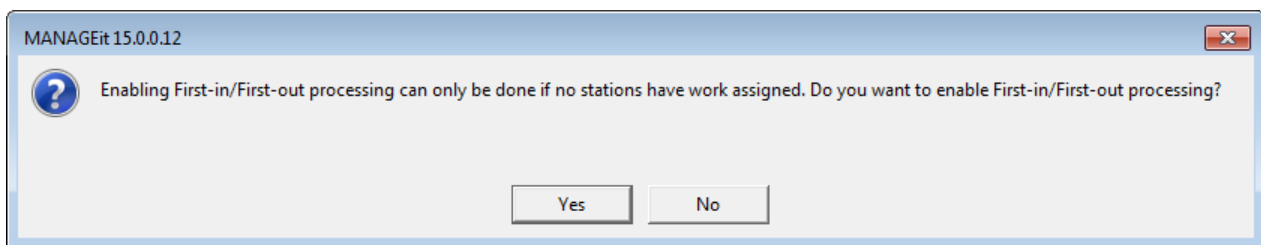
- Processing is stepped, meaning all batch images must complete a phase before any images in the batch go on to the next phase.



- Verification is done one operator per batch. No matter how large the batch is, one Verification operator is assigned the entire batch.



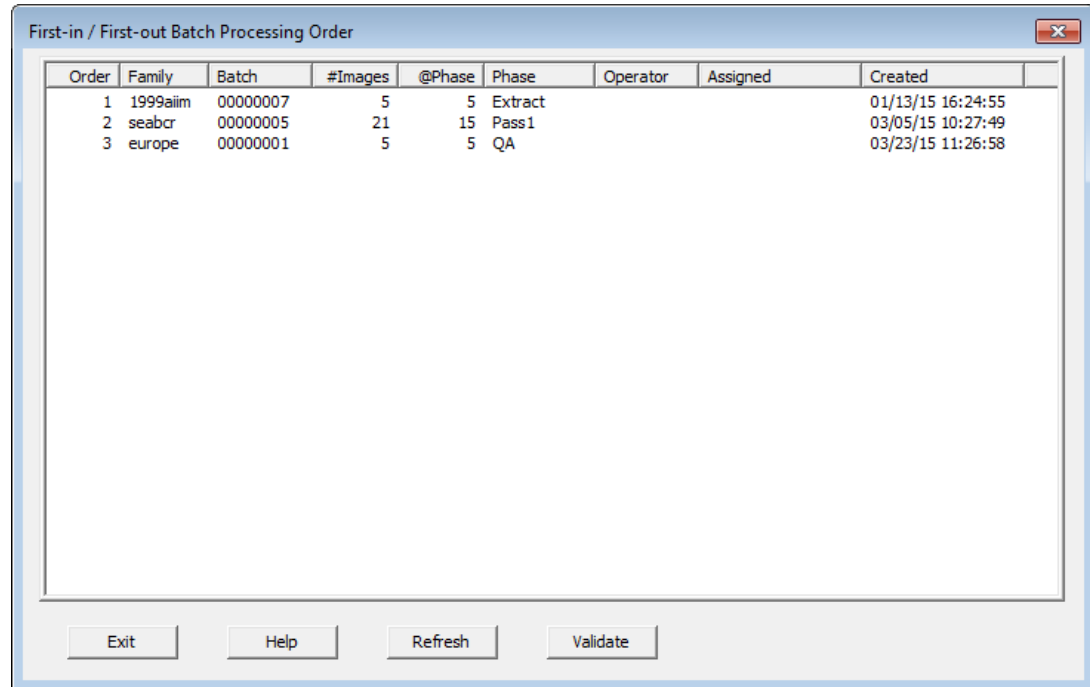
When you enable the First-in / First-out check box, a message is displayed.



If no stations currently have work assigned, click **Yes** to continue. When you click OK to exit the AutoFlow Settings window, OCR for AnyDoc runs through the available batches to establish the processing order.

## Monitoring

If you open the AutoFlow Settings window again, the View button is now active; click to access the First-in / First-out Batch Processing Order window showing the order in which the batches are processed.

A screenshot of a software window titled "First-in / First-out Batch Processing Order". The window contains a table with the following data:

Order	Family	Batch	#Images	@Phase	Phase	Operator	Assigned	Created
1	1999aim	00000007	5	5	Extract			01/13/15 16:24:55
2	seabcr	00000005	21	15	Pass1			03/05/15 10:27:49
3	europe	00000001	5	5	QA			03/23/15 11:26:58

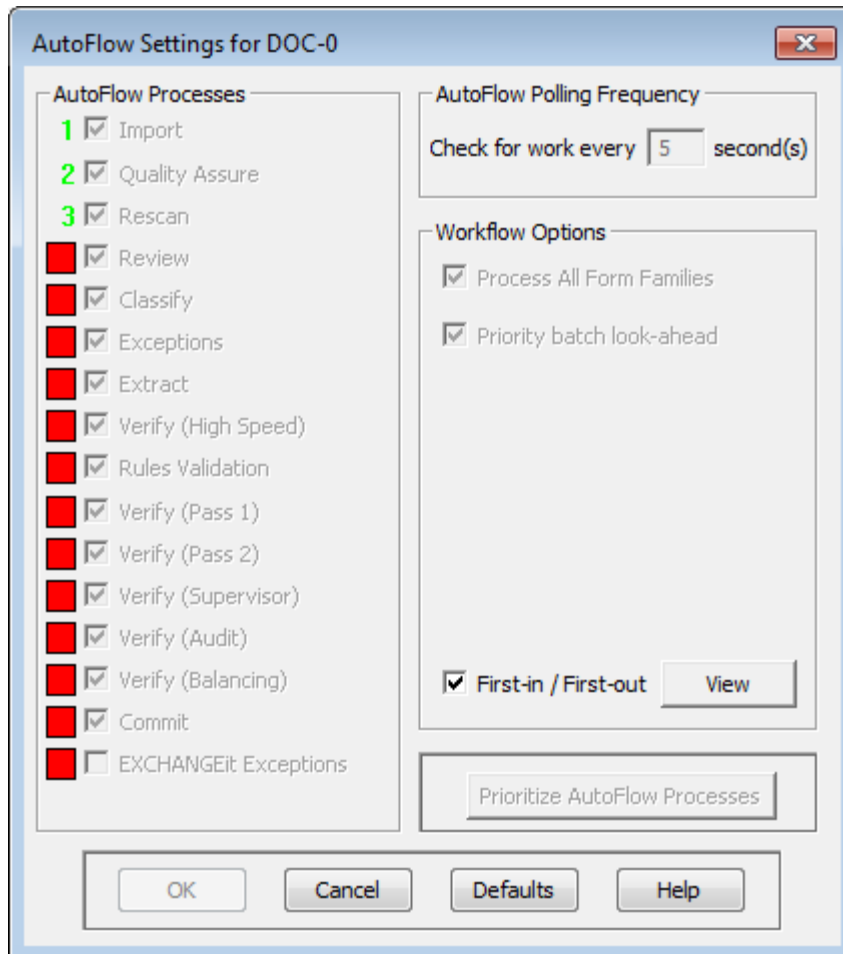
Below the table are four buttons: Exit, Help, Refresh, and Validate.

This window allows you to see the order in which the batches are processed by AutoFlow. The Refresh button refreshes the display; the Validate button rebuilds the list of batches from the server.

### Prioritize AutoFlow Processes

The order in which the processing phases are listed in the AutoFlow Settings window is the default priority order. The Prioritize AutoFlow Processes button allows you to change the priority levels of the processing phases for the current user name. AutoFlow processes all available batches in the phase with the highest priority first, then moves on to the next phase.

When you click the Prioritize AutoFlow Processes button, the numbers next to the phases turn to red squares.



Click the red squares in priority order; green numbers replace the red squares as you click them. You have to click every square even if some of the phases are not being run in AutoFlow on the workstation.

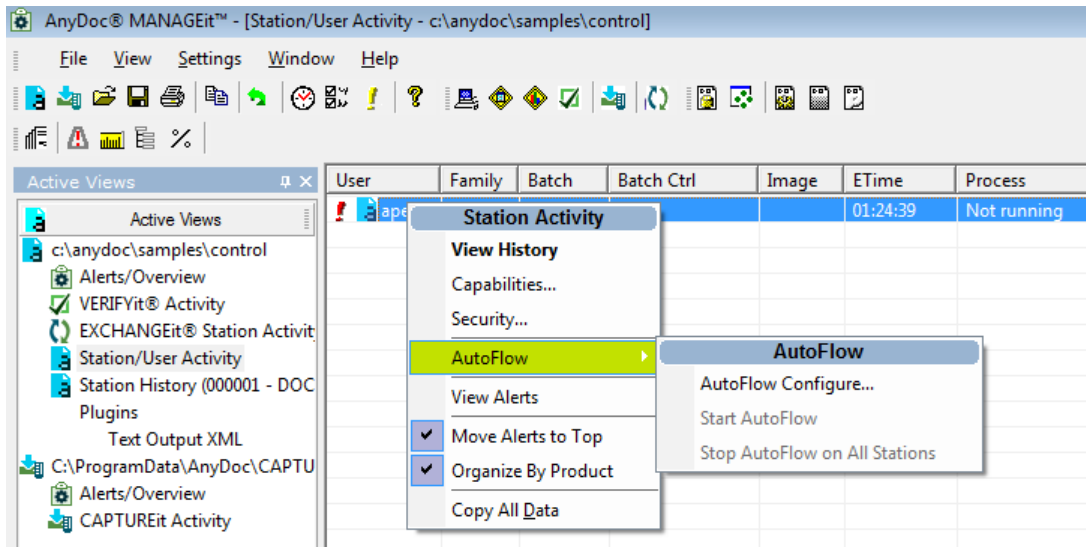
### Start or Stop AutoFlow on a Selected Station

After AutoFlow has been set up for a user, you can choose to start the process on the selected station/user or on all stations/users.

#### Steps

## Monitoring

- 1 Right-click the selected station or user in the **Station/User Activity** window to display the menu.



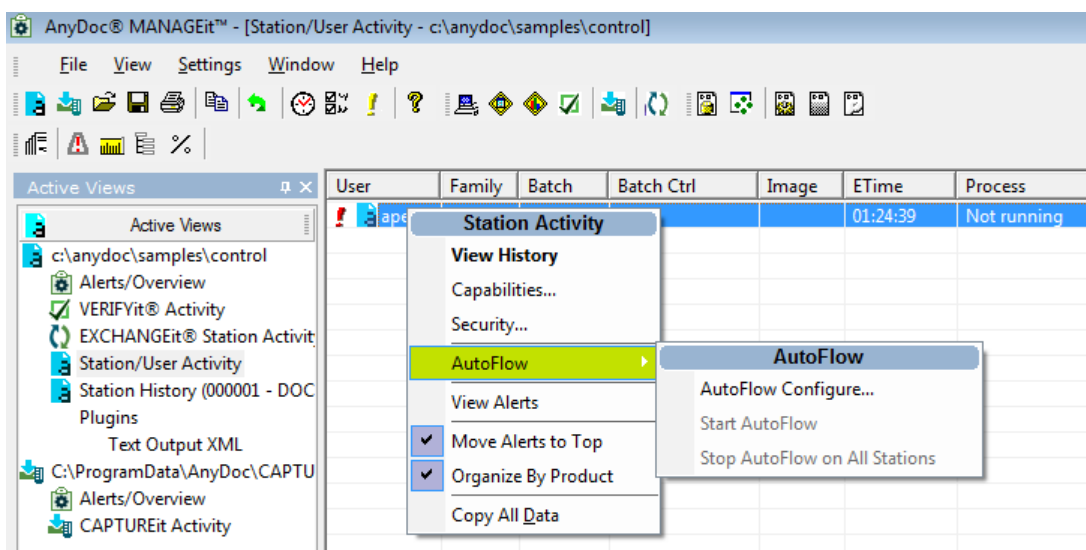
- 2 Select **AutoFlow | Start AutoFlow** or **Stop AutoFlow**. The menu option switches between stop and start depending on whether or not AutoFlow is currently running on the selected workstation.

### Start or Stop AutoFlow on All Stations

MANAGEit provides the capability of starting or stopping AutoFlow for all stations listed in Station/User Activity at once.

#### Steps

- 1 Right click any station or user in the **Station/User Activity** window to display the menu.



- 2 Select **AutoFlow | Stop Autoflow on All Stations** or **Start AutoFlow**. The menu option switches between stop and start depending on whether or not AutoFlow is currently running.

## View Pending Work

MANAGEit allows you to view the work in progress for stations in the OCR for AnyDoc installation. Pending work refers to any batches that have been imported and not yet committed.

### Steps

- 1 Select **View | Pending Work**

The **Pending Work** window is displayed.

The Pending Work window contains the following columns:

Column	Description
Family/Batch	The form family name and batch IDs.
Batches	The number of batches in each form family.
Batch Control	The user-assigned batch control number.
Create Time	The date and time the batch was scanned if the batch was scanned by an OnBase AnyDoc product.
ETime	The time elapsed since the batch was created.
Total	The total number of pending images. A balloon pop-up lists the total number of pending batches and pending images, as well as the number of images available for processing. This total does not include images waiting to be imported.
Import	The total number of images awaiting import into OCR for AnyDoc. Images reside in the Import directory of the form family.
Processing Phase	The number of images in each processing phase. You have the option of displaying a column for each processing phase, but the default displays QA, Auto ID, Exceptions, Extraction, Pass 1 Verification and Commit.
Family	The form family file name without the .fof extension.
Job Queue Path	The job queue path of the form family.
Operators	The name of the operator processing each batch and the current phase of each batch.
Import Time	The date and time the batch was imported into OCR

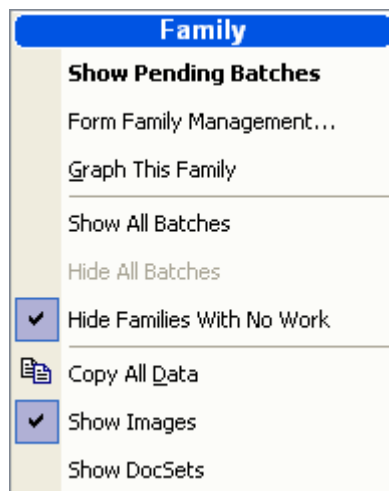
**Monitoring**

Column	Description
	for AnyDoc.

This window can be customized to include all or some of the available columns in any order. For more information, see [Customize the User Interface](#) (page 18). Defaults for the Pending Work window can be set in the [Control Path Definition | Pending Work](#) tab. For more information, see [Set Pending Work Display Settings](#) (page 35).

## Pending Work Options

Right-click a form family or batch in the Pending Work window for additional options.



Hide/Show Pending Batches	Hide or show pending batches for the selected form family. The menu option switches between hide and show depending on whether pending batches are currently shown or hidden.
Form Family Management	Opens OCR for AnyDoc Form Family Management for the selected form family. See <a href="#">OCR for AnyDoc Form Family Management</a> (page 246).
Graph This Family	View a graph of pending work for the selected form family. See <a href="#">Pending Work Graph</a> (page 61).
Show All Batches	Show pending batches for all form families.
Hide All Batches	Hide pending batches for all form families.
Hide Families With No Work	Form families with no batches are hidden, unless the form family has images waiting to be imported.
Copy All Data	All data that is displayed in the window can be copied to the Windows Clipboard and then pasted into other applications.
Show Images	All counts are shown as number of images.

Show DocSets

All counts are shown as number of document sets.

## Pending Work Graph

The Pending Work Graph provides a graphic representation of the number of pending images in each phase either for one form family or for all pending work. This graph automatically refreshes (based on the refresh rate set).

### Steps

- 1 Select **View | Pending Work Graph** from the menu

OR

Click the **Graph Pending Work Totals** button, 

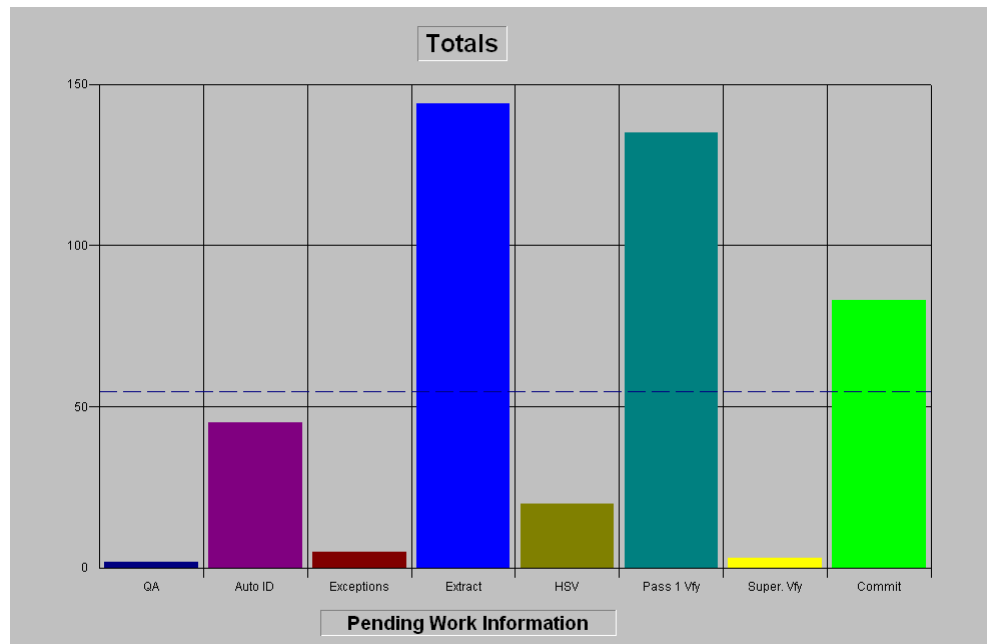
OR

Right-click the Totals line in the Pending Work window and select **Graph This Family**.

The **Pending Work Graph** is displayed for all pending work or for the selected form family.

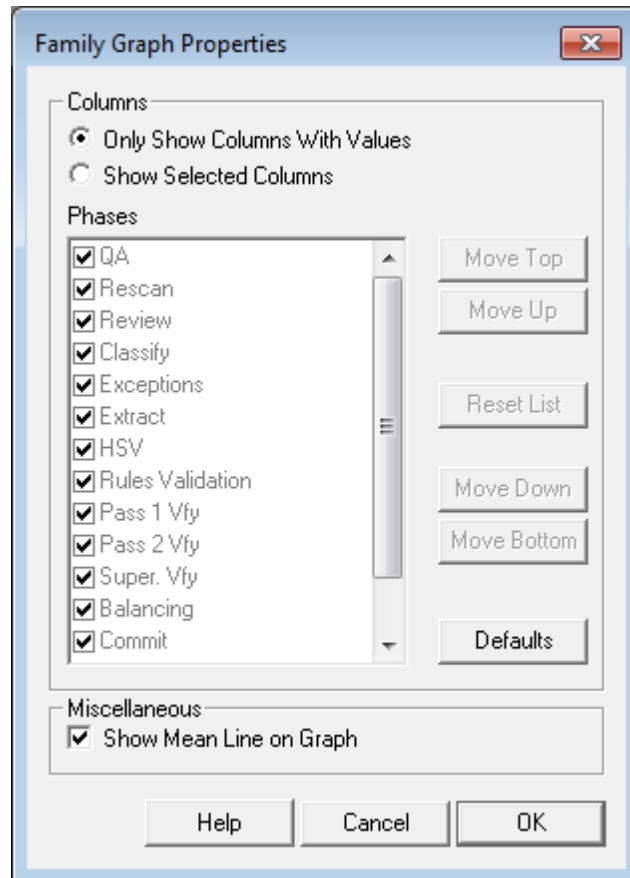


To view a graph of pending work for one form family, right-click the form family in the Pending Work window and select Graph This Family.



**Monitoring**

- 2 Right-click the graph and select **Properties** to access the Family Graph Properties window. This window allows you to choose the batch processing phase(s) graphed, the order in which the phases appear (column order) and whether the mean line (blue, dotted line) is displayed on the graph.



- 3 Enable either **Only Show Columns With Values** or **Show Selected Columns**. If **Show Selected Columns** is enabled, hide or show a particular phase by clicking one or more of the phases to hide or show the column.
- 4 To show all phases, click **Reset List** to enable all phases in the list.
- 5 To rearrange the column order, enable a phase and click a button to **Move Top**, **Move Up**, **Move Down**, or **Move Bottom**.
- 6 Enable the **Show Mean Line on Graph** check box to display the mean line.
- 7 Click **OK**.





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**Monitoring**

Shows current CAPTUREit station activity. For more information, see View CAPTUREit Activity (page [67](#)).

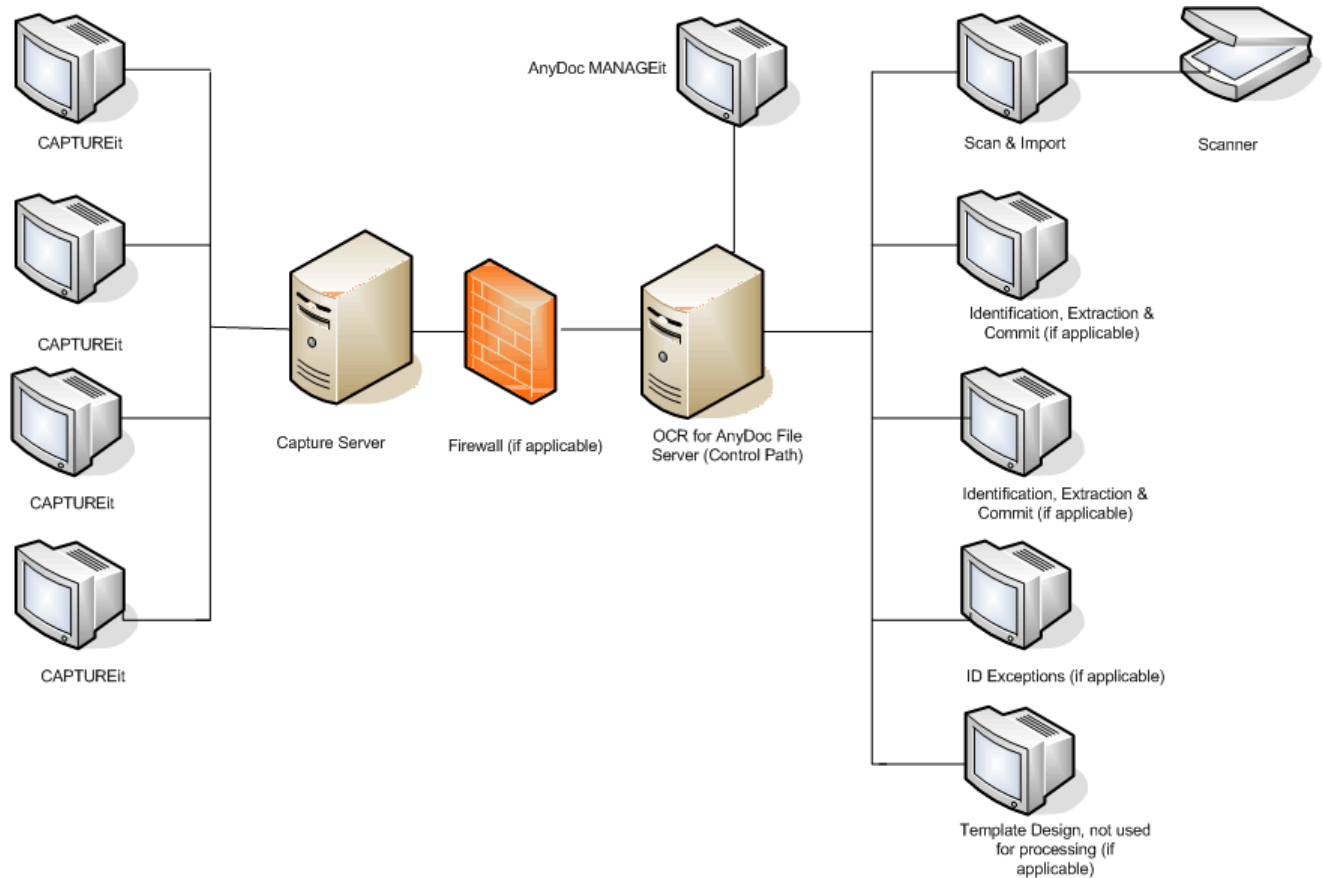
- **CAPTUREit History**  
Shows historical information from the central CAPTUREit Server database. For more information, see View CAPTUREit History (page [68](#)).
- **CAPTUREit Messages**  
Shows status messages sent from OCR for AnyDoc and EXCHANGEit back to the CAPTUREit workstations. This option is only available if OCR for AnyDoc is configured to post messages back to the originating CAPTUREit stations when batches are Imported or Committed. For more information, see View CAPTUREit Messages (page [69](#)).

There are two ways to set up CAPTUREit monitoring in MANAGEit:

- Automatically monitor CAPTUREit in conjunction with OCR for AnyDoc. When you set up the OCR for AnyDoc Control Path Definition, MANAGEit provides access to CAPTUREit monitoring as well.
- Set up CAPTUREit Server monitoring independent of OCR for AnyDoc. You can monitor a CAPTUREit installation without OCR for AnyDoc by setting up a CAPTUREit Server Definition in MANAGEit. See Set Up a CAPTUREit Server Definition (page [65](#)).

## CAPTUREit Environments

MANAGEit is designed to monitor an entire CAPTUREit installation from a single station. The following figures illustrate one of the possible configurations for networks with a dedicated MANAGEit station.



## Create a New CAPTUREit Server Definition

If you are using CAPTUREit without OCR for AnyDoc, you can monitor all CAPTUREit stations associated with a specific CAPTUREit Server database by setting up a CAPTUREit Server Definition in MANAGEit.

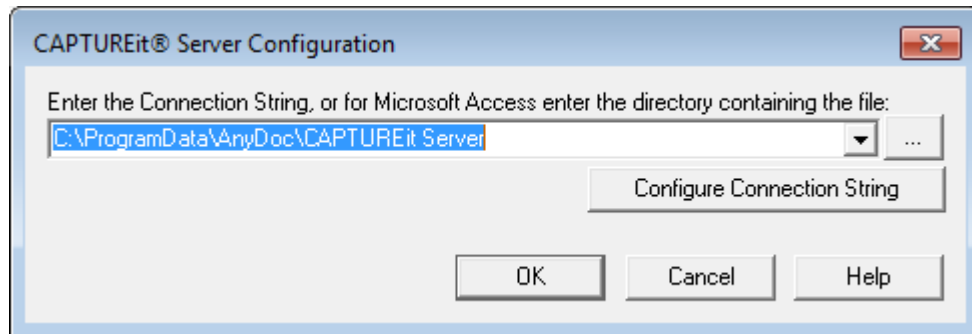
### Steps

- 1 Select **File | New | New CAPTUREit Server**.
- OR


Click the **New CAPTUREit Server** button, .

**Monitoring**

The **CAPTUREit® Server Configuration** window is displayed.



2 Do one of the following:

- Enter the path to the CAPTUREit Server database
- Click  to browse for the directory. The default location is ...AnyDoc\CAPTUREit\RemoteDB. The default Access database name is CAPTUREit.mdb.
- Click **Configure Connection String** to open the **Data Link Properties** window. On the **Connection** tab, enter the connection string information, such as the data source and server logon information. The **Connection** tab options vary according to the Provider selected. Click **Test Connection** to test whether the data source connection has been accurately configured. If the connection is successful, a “Test connection succeeded” message appears. Click **OK**.

3 Click **OK**.

The **CAPTUREit Server Activity** window opens displaying current CAPTUREit activity.

AnyDoc® MANAGEit™ - [CAPTUREit Activity - C:\ProgramData\AnyDoc\CAPTUREit Server\Control]											
File View Settings Window Help											
Computer ID	Scan Station ID	User	Last Update	ETime	Connected	Version	Process	Batch	Total I...	Origina...	DocSets
DOC-0		SYSTEM	3/28/2015 5:23:...	1:18:49:18		15.0.0					
ONBASE\DOC-0		Admin	3/18/2015 9:33:...	12:02:39:49	Disconnected	15.0.0.12	Idle	1 batch	2	0	2

4 To save the CAPTUREit Server Definition, select **File | Save As**.

The **Save As** window is displayed.

5 Enter a name for the **CAPTUREit Server Definition** and click **Save**.

The extension for CAPTUREit Server Definition files is .aci. The default location is C:\ProgramData\AnyDoc\MANAGEit\Settings.

## View CAPTUREit Activity

The CAPTUREit Activity window provides a snapshot of status and activity for each station and CAPTUREit Server. If you are monitoring CAPTUREit in conjunction with OCR for AnyDoc, it shows all CAPTUREit Servers associated with the OCR for AnyDoc control path. If you are monitoring CAPTUREit without OCR for AnyDoc, it shows all CAPTUREit Servers associated with the specified CAPTUREit Server database.

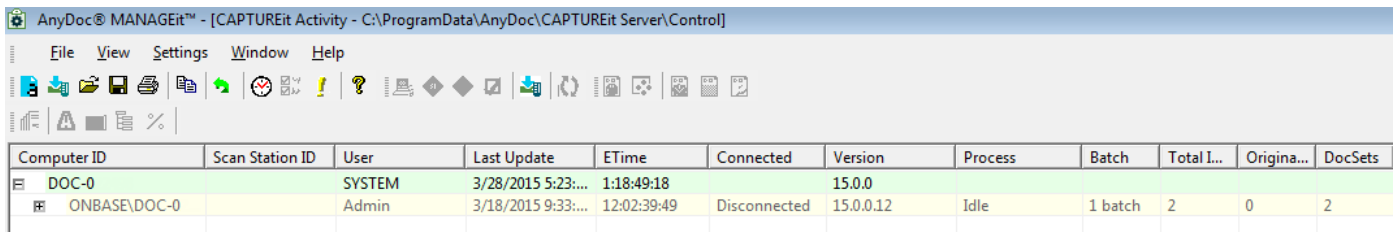
### Steps

- 1 Select **View | CAPTUREit Activity**

OR

Click the **CAPTUREit Activity** button, 

The **CAPTUREit Activity** window is displayed.



Computer ID	Scan Station ID	User	Last Update	ETime	Connected	Version	Process	Batch	Total I...	Origina...	DocSets
DOC-0		SYSTEM	3/28/2015 5:23:...	1:18:49:18		15.0.0					
ONBASE\DOC-0		Admin	3/18/2015 9:33:...	12:02:39:49	Disconnected	15.0.0.12	Idle	1 batch	2	0	2

This window provides the following status and activity information for each CAPTUREit Server and CAPTUREit station.

Column	Description
Computer ID	The name of the computer (as configured in Windows).
Scan Station ID	The Unique Scan Station Identifier assigned to the CAPTUREit station in Configure Scanner Settings.
User	The user from the login at each station or the last known user for disconnected stations.
Time	The time of the last update received from the station.
Computer Login	Whether or not the station is currently logged in to the server. Shows either Connected or Disconnected.
Process	For each batch, this shows the current processing phase, such as Scanning, Preprocess, and Importing. For disconnected stations this shows the last known processing phase.
Batch	At the station level, this shows the number of batches in process on the workstation. At the batch level it shows the batch ID.
Total Images	At the station level, this shows the total number of images

**Monitoring**

Column	Description
	in all batches currently on the workstation. At the batch level it shows the number of images in each batch.
Original Images	The original number of images in each batch before any deletions or insertions.
DocSets	The number of document sets in each batch.
Profile	The capture profile to which the batch belongs, if any.
Family	The OCR for AnyDoc form family file name if the capture profile outputs images to OCR for AnyDoc.
First Imprinter	The first imprinter string in the batch.
Last Imprinter	The last imprinter string in the batch.

By default, all of the available columns display in this window. To turn the display of individual columns on or off, right-click the column heading and select columns to show or hide. To move a column, click the column heading and drag it to a different location.

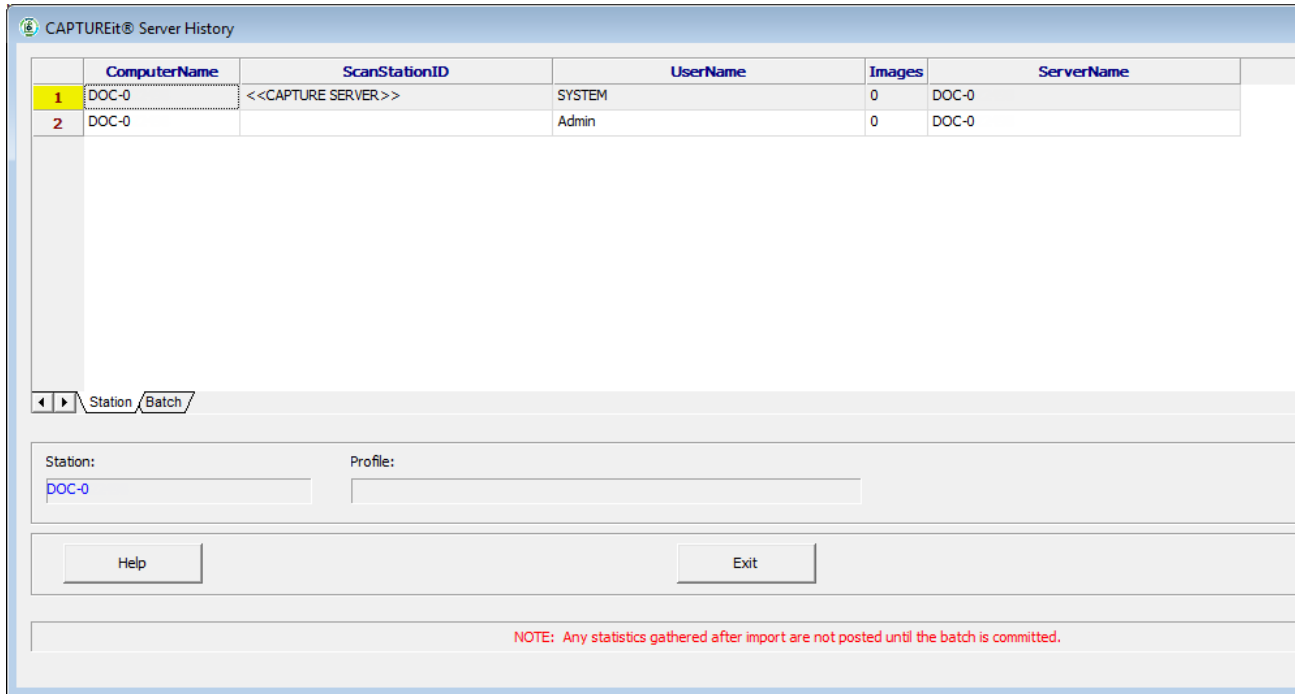
## View CAPTUREit History

The CAPTUREit History window provides historical information from the CAPTUREit Server database for each station and CAPTUREit Server. If you are monitoring CAPTUREit in conjunction with OCR for AnyDoc, it shows all CAPTUREit Servers associated with the OCR for AnyDoc control path. If you are monitoring CAPTUREit without OCR for AnyDoc, it shows all CAPTUREit Servers associated with the specified CAPTUREit Server database.

**Steps**

- 1 Select **View | CAPTUREit History**.

The **CAPTUREit Server History** window is displayed.



	ComputerName	ScanStationID	UserName	Images	ServerName
1	DOC-0	<<CAPTURE SERVER>>	SYSTEM	0	DOC-0
2	DOC-0		Admin	0	DOC-0

Station:  Profile:

Help Exit

NOTE: Any statistics gathered after import are not posted until the batch is committed.

- 2 To view information about each CAPTUREit station, click the **Station** tab.
- 3 To view information about the batch on a station, select a station in the **ComputerName** column and click the **Batch** tab. Information is displayed for all batches on the selected station, such as the creation date and current phase each batch is in.
- 4 Click **Exit**.

## View CAPTUREit Messages

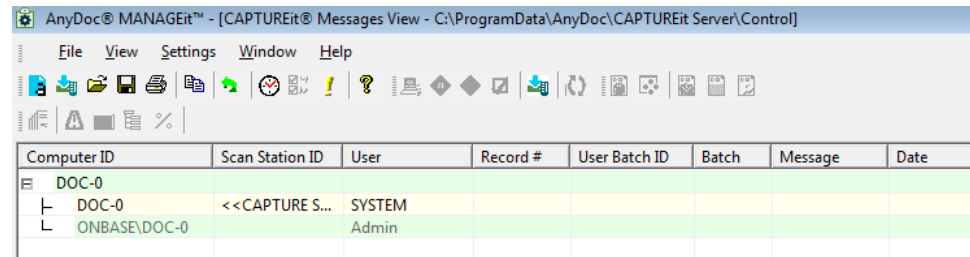
The CAPTUREit Messages View window shows a status message history sent from OCR for AnyDoc back to the CAPTUREit station that originated the batch if this feature is used.

### Steps

- 1 Select **View | CAPTUREit Messages**  
OR

## Monitoring

Type [Alt+3]. The CAPTUREit Messages View window is displayed.



This window provides the following status and activity information for each CAPTUREit Server and CAPTUREit station that has received status message from OCR for AnyDoc.

Column	Description
Computer ID	The name of the computer.
Scan Station ID	The unique scan station identifier assigned to the CAPTUREit station in Configure Scanner Settings.
User	The user from the login at each station (or the last known user for disconnected stations).
Record #	A record number determined by the order in which the records are received.
User Batch ID	The OCR for AnyDoc batch number.
Batch	At the station level, this shows the number of batches in for the workstation. At the batch level, it shows the CAPTUREit Batch ID.
Message	The status message from OCR for AnyDoc, Imported, Committed, or Deleted.
Date	The date the message was received.

By default, all of the available columns display in this window. You can turn the display of individual columns on or off by right clicking in the column heading and selecting or deselecting columns in the pop up menu. To move a column, click the column heading and drag it to a different location.

## Monitor EXCHANGEit

There are three EXCHANGEit monitoring windows:

- EXCHANGEit Station Activity  
Shows current EXCHANGEit station activity. For more information, see View EXCHANGEit Station Activity (page [71](#)).
- EXCHANGEit Job Activity



Shows current EXCHANGEit job activity. For more information, see View EXCHANGEit Job Activity (page [72](#)).

- **EXCHANGEit History**  
Shows historical information from the central EXCHANGEit Server database. For more information, see View EXCHANGEit History (page [73](#)).

## View EXCHANGEit Station Activity

MANAGEit can monitor EXCHANGEit Station activity, Job activity, and Station history. To monitor EXCHANGEit the following requirements must be met:

- EXCHANGEit version 5.1.1 or higher must be installed.
- A valid OCR for AnyDoc control path must be specified in EXCHANGEit.
- The **Move/Store Exceptions in the OCR Control Path** check box must be selected in the **Directory/Computer Settings** window in EXCHANGEit.

### Steps

- 1 From the **View** menu, click **EXCHANGEit Station Activity**

The **EXCHANGEit Station Activity** window is displayed.

This window provides the following status and activity information for each EXCHANGEit station:

Column	Description
Computer ID	The name of the computer (as configured in Windows).
Process	EXCHANGEit's current processing phase or status.
User	The user from the login at each station or the last known user for disconnected stations.
Job Name	The name of the EXCHANGEit Job currently running on the specified workstation.
XJB Name	The name of the .xjb file currently running on the specified workstation.
Records Processed	The number of records processed when running a job.
Begin Time	The date and time the current job started running.
ETime	The time elapsed since the current job started running.
Source	The OnBase AnyDoc product that prompted the job to run, such as CAPTUREit or OCR for AnyDoc.
Batch	The number of batches in process on the workstation.
Total Images	At the station level, this shows the total number of images in all batches currently on the workstation. At the batch

**Monitoring**

Column	Description
	level it shows the number of images in each batch.
User Batch ID	OCR for AnyDoc batch control number.
Serial #	The serial number of the license key.
Version	The current version # installed on the EXCHANGEit workstation.



By default, all of the available columns display in this window. To turn the display of individual columns on or off, right-click the column heading and select columns to show or hide. To move a column, click the column heading and drag it to a different location.

## View EXCHANGEit Job Activity

MANAGEit can monitor EXCHANGEit job activity. To monitor EXCHANGEit jobs, the following requirements must be met:

- EXCHANGEit version 5.1.12 or higher must be installed.
- A valid OCR for AnyDoc control path must be specified in EXCHANGEit.

### Steps

- 1 From the **View** menu, click **EXCHANGEit Job Activity**.

The **EXCHANGEit Station Activity** window is displayed.

This window provides the following information for each EXCHANGEit job:

Column	Description
Job Name	The name of each EXCHANGEit Job. If the job has multiple source paths, there will be one entry per source path.
Last Run	The date and time the job was last run.
Import	The number of records pending import.
Import Folder	This column is only available for jobs with a GTO, EDI or Text source. The location of the records to be imported.



By default, all of the available columns display in this window. To turn the display of individual columns on or off, right-click the column heading and select columns to show or hide. To move a column, click the column heading and drag it to a different location.

## View EXCHANGEit History

### Steps

- 1 From the **View** menu, click **EXCHANGEit Station Activity**.  
The **EXCHANGEit Station Activity** window is displayed.
- 2 Right-click any row and click **Show EXCHANGEit History**.  
The **EXCHANGEit History** window is displayed. This window provides the following information:

Column	Description
Computer ID	The name of the computer (as configured in Windows).
Process	EXCHANGEit's current processing phase or status.
User	The user from the login at each station or the last known user for disconnected stations.
Job Name	The name of the EXCHANGEit Job currently running on the specified workstation.
XJB Name	The name of the .xjb file currently running on the specified workstation.
Records Processed	The number of records processed when running a job.
Begin Time	The date and time the current job started running.
ETime	The time elapsed since the current job started running.
Source	The OnBase AnyDoc product that prompted the job to run, such as CAPTUREit or OCR for AnyDoc.
Batch	The number of batches in process on the workstation.
Total Images	At the station level, this shows the total number of images in all batches currently on the workstation. At the batch level it shows the number of images in each batch.
User Batch ID	OCR for AnyDoc batch control number.
Serial #	The serial number of the license key.
Version	The current version # installed on the EXCHANGEit workstation.

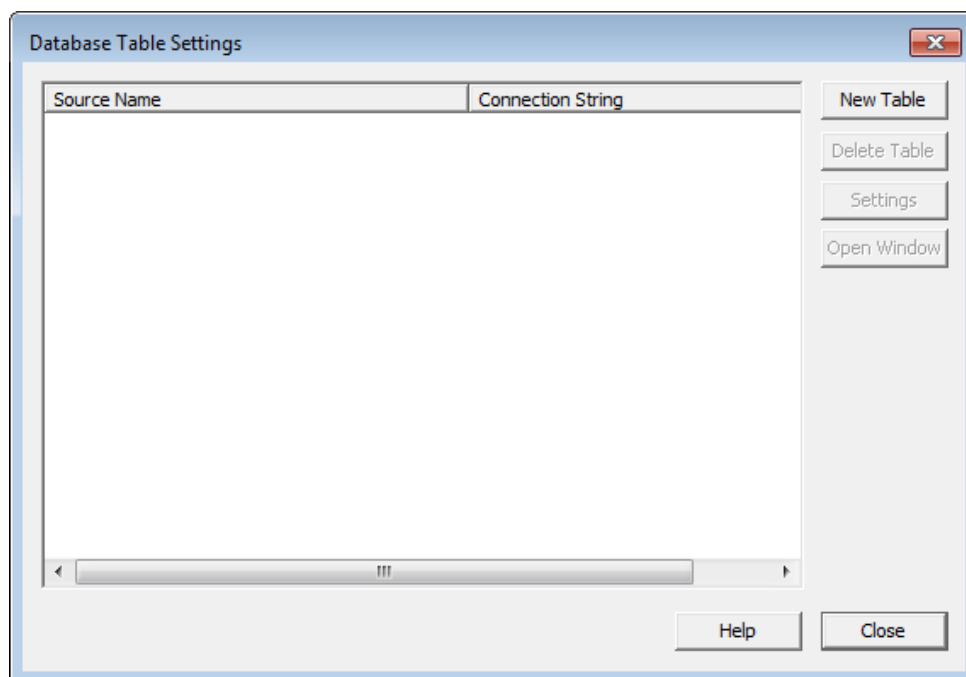
**Monitoring**

## Monitoring Database Tables

Similar to the way other data is monitored in MANAGEit, database tables can be queried and monitored as well. Before viewing the database table data, the connection to the table must be created. Multiple connections can be created and saved.

**Steps**

- 1 From the **View** menu, click **Database Tables**.  
The **Database Table Settings** window is displayed.



- 2 Click **New Table**.

The **Database Table Settings** window is displayed.

The screenshot shows the 'Database Table Settings' dialog box. It includes a 'Custom Source Name' field with the text 'New Source', a 'NULL Values Display As' dropdown set to '<null>', a 'Connection String' section with a 'Configure Connection String' button, a 'Query' section with a 'Refresh' button, and a 'Fields' section with a table header 'Field Name' and a 'Selected Field Type' dropdown. The bottom of the dialog features 'Help', 'Cancel', and 'OK' buttons.

- 3 In the **Custom Source Name** field, enter a unique name for the connection.
- 4 In the **Null Values Display As** field, specify what a null value should be output as.
- 5 Click **Configure Connection String**.  
The **Data Link Properties** window is displayed.
- 6 On the **Connection** tab, specify the source information and click **OK**.  
The **Connection String** field is populated with the database table connection details.
- 7 In the **Query** field, enter the SQL query and click **Refresh**.  
The **Fields** from the selected database table are displayed.
- 8 To assign a data type to a field, select a field and select the applicable data type from the drop down menu. This field is only required if an alert is configured for a data field. For more information, see Database Table Alert Settings (page [96](#)).

**Monitoring**

- 9 Click **OK**.

## View License Key Information

The AnyDoc License Keys window displays metered licensing information for all stations using the selected control path. To display this information, the following product versions must be installed on each station:

- CAPTUREit CAPTUREit Server 5.0 or later
- OCR for AnyDoc 4.0.1 or later

Expired License keys are displayed in red.

### Steps

- 1 From the **View** menu, click **License Key Information**.

The **License Keys** window is displayed.

Serial...	Feature	Click...	Click...	Clicks Left	Begin Date	End Date	Days Left	Last Update
025030	OCR for AnyDoc	2301	60000	57699 (9...	4/3/2005	4/3/2006	111 (30.48%)	6/8/2005 11:...
025410	OCR for AnyDoc	465	60000	59535 (9...	5/31/2005	7/31/2005	-134 (-219.6...	6/8/2005 11:...

This window provides the following metered licensing information for each station.

Column	Description
Serial #	The key ID or serial number of the key. The same serial number can display multiple times if the key contains more than one metered feature.
Feature	The name of the feature associated with the metered key.
Clicks Used	The number of clicks used out of the total number of clicks allowed for this feature.
Clicks Total	The total number of clicks allotted for this feature.
Clicks Left	The number of unused clicks remaining on the key for the feature.
Begin Date	The first day the key is valid for the metered feature.
End Date	The last day the key is valid for AnyApp metered features. For features in other applications, the date the click counter resets to zero clicks used for metered features.
Days Left	The number of days left on the key before the metered feature expires.

Column	Description
Last Update	The last time key information was saved to MANAGEit for informational purposes.
Notes	Contains additional information about the key. This column is typically blank but can display "Out of Clicks" and "This feature has expired" messages.

## Replace License Keys

License keys can be flagged as replaced within MANAGEit, whenever a license key is physically replaced on a machine due to expired metered features. This alerts MANAGEit that the key is no longer in use, and MANAGEit will no longer trigger alerts for that expired feature.

### Steps

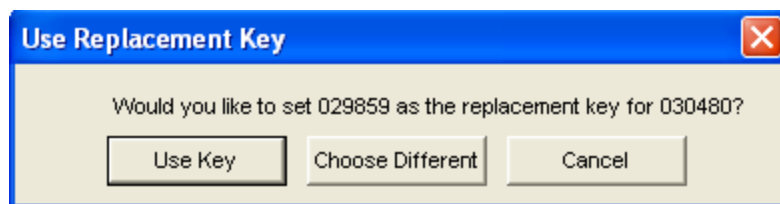
- 1 From the **View** menu, click **License Key Information**.

The **License Keys** window is displayed.

Serial...	Feature	Click...	Click...	Clicks Left	Begin Date	End Date	Days Left	Last Update
025030	OCR for AnyDoc	2301	60000	57699 (9...	4/3/2005	4/3/2006	111 (30.48%)	6/8/2005 11:...
025410	OCR for AnyDoc	465	60000	59535 (9...	5/31/2005	7/31/2005	-134 (-219.6...	6/8/2005 11:...

- 2 Right-click a license key that is displayed in red and select **Replace Key**.

The **Use Replacement Key** window is displayed. MANAGEit will detect available replacement keys and recommend one.



- 3 To use the recommended key click **Use Key**.
- 4 To select a different license key, click **Choose Different**.

The **Choose Replacement Key** window is displayed. Select the replacement key and click **OK**.



The **Notes** column indicates that key was replaced and indicates the replacement key's serial number. To remove the expired serial number from the alert list, right-click any row in the window and select **Show Replaced Keys** so the checkmark is removed.

**Monitoring**

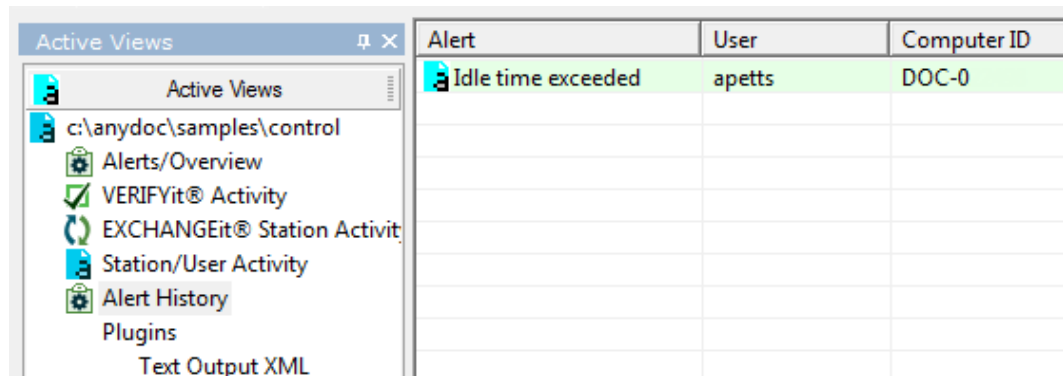
## View Alert History

The Alert History list displays all alerts that have occurred previously but have since been taken care of.


**Steps**

- 1 From the **View** menu, click **Alert History**.

The **Alert History** view displays all alerts that have expired.



Alert	User	Computer ID
Idle time exceeded	apetts	DOC-0

 Expired alerts are removed from the Alert History view when MANAGEit is closed. To clear expired alerts without closing MANAGEit, right-click an alert and click **Clear Expired Alerts**.

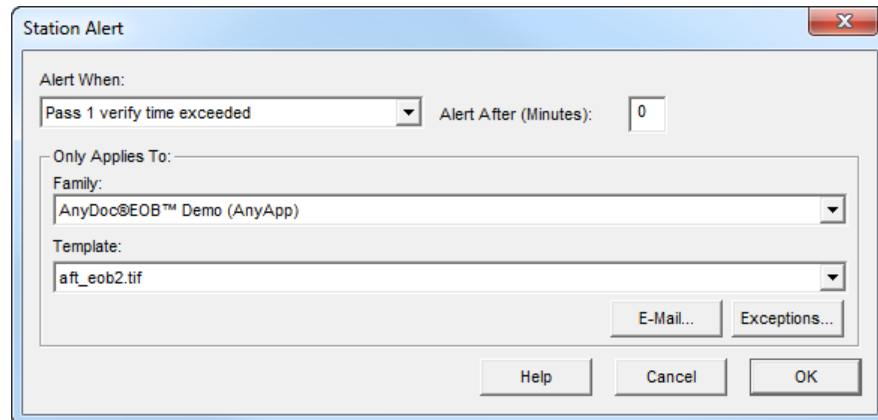
## View Alert Exceptions

Conditions can be set on alerts to specify when an alert should not be triggered or the specific conditions when an alert should be triggered. These conditions are set by day and time. For example, a condition can be set that an alert not be sent when a specific station is not running during the specified time frame. User DonR not running does not trigger an alert that his workstation is not running between the hours of 12:00 PM and 1:00 PM Monday through Friday.

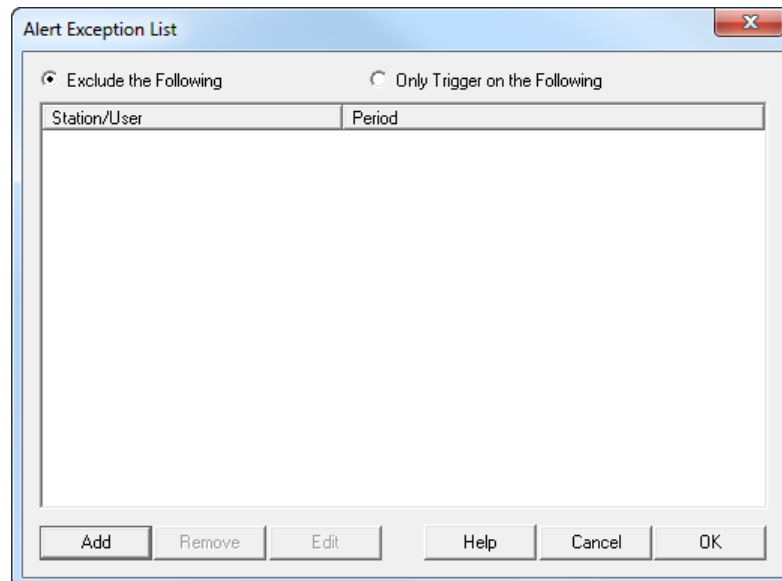
**Steps**



- 1 From the **Alert Settings** window, double-click an alert to apply conditions to the alert. The **Station Alert** window is displayed.



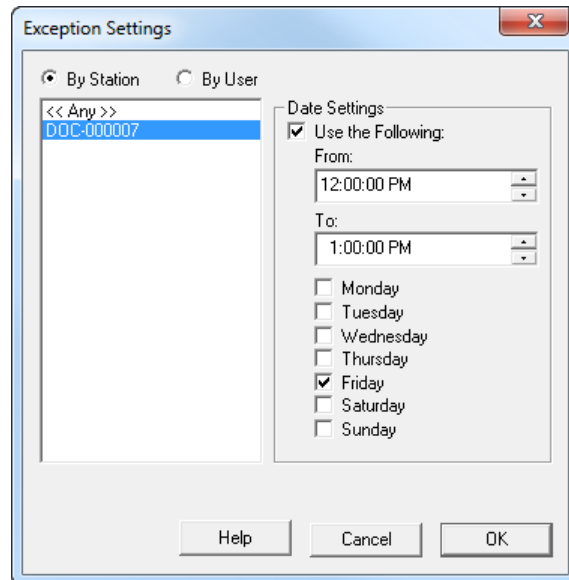
- 2 Click the **Exceptions** button. The **Alert Exception List** window is displayed.




- 3 Select the **Exclude the Following** radio button to set exclusions for the station or user added to the list.
- 4 Select the **Only Trigger on the Following** radio button to set conditions for triggering the alert for the station or user added to the list.

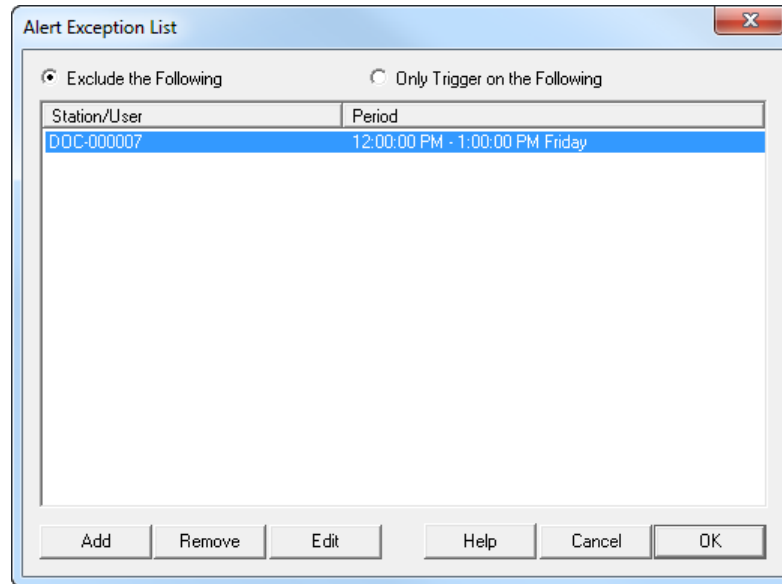
**Monitoring**

- 5 Click the **Add** button to select the station or user and the conditions for the alert. The **Exception Settings** window is displayed.



- 6 To view the list by station name, select the **By Station** option.  
To view the list by user name, select the **By User** option.
- 7 Select a station/user from the list.  
To apply these conditions to all stations/user, select **Any** in the list.
- 8 Select the **Use the Following** check box in the **Date Settings** section. The time and date options become available.
- 9 Select a **From** and **To** time from the lists to set the time specifications.
- 10 Select a day or days check box to apply the time constraints to for the selected station or user.
- 11 Click **OK**. The station or user with an alert condition is displayed in the **Alert Exception** window.

 The **OK** button in the **Exception Settings** window will not become available until valid settings (station/user, **From** and **To** times, and days) have been entered for the exception.



- 12 To remove a station/user from the list, click the **Remove** button.
- 13 To edit a station/user alert condition, select the station/user and click the **Edit** button. The **Exceptions Settings** window is displayed.

## Send Alert Notifications on Demand

Ad hoc alerts can manually be sent via e-mail to the user(s) defined in the Alerts | E-Mail Alerts tab. For more information, see E-mail Alert Notifications (page [97](#)). The subject of the e-mail indicates the total number of new and expired alerts.

The alert e-mail contains the following:

- New Alerts  
The alerts that were triggered during the last refresh.
- Expired Alerts  
The alerts that were no longer considered active after the last refresh; the condition was either satisfied or no longer exists.
- Current alerts in the system  
The total number of active alerts in the system.

Only sections containing alerts are displayed in the e-mail.

### Steps

- 1 From the **File** menu, click **Send Alerts**. The **Send Alerts** window is displayed.

**Monitoring**

If **File | Send Alerts** is not available, you must first go to **Settings | Alerts** set up users' e-mail addresses to receive the alert messages. For more information, see Set E-mail Alert Settings (page [97](#)).



- 2 Type the alert message to be sent and click **OK**.  
The message is sent to the configured users, and all associated alerts that have occurred are displayed.

## View Software License Server

This option allows the user to select a machine that is running a software license server and view information about the licenses on that server.

### Steps

- 1 From the **View** menu, click **View Software License Server**.
- 2 In the **Select License Server Host Computer** dialog box, use the drop-down list to select the machine name for the computer running the software license server, or use the browse button to navigate to the computer.
- 3 Click **OK**.

The **View License** window displays licensing information for all installed OnBase AnyDoc products.

The screenshot shows the 'View License' window with the following sections:

- Features List:** A tree view showing installed features. Under 'MANAGEit', 'Monitoring' is highlighted.
- Server & License Information:** Fields for Name (TAMPA-024741), Version (8.5.3.35), Serial Number (QA027), Account ID (QATEST), Type (User), and Grace Days (0). A message states: 'This temporary license expires on 3/10/2014 11:59:59 PM'.
- Feature Information:** A section for 'Monitoring (MANAGEIT\_MONITOR)' showing 'Seat Count' (2) and 'Seats in Use' (0).
- Table:** A table with columns 'User', 'Host Machine', and 'Date Requested'. It contains several empty rows.
- Buttons:** 'Refresh' and 'Exit' buttons at the bottom right.

# Chapter 7

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## Alert Settings

Alerts warn about processing situations that may require attention. You can configure alerts to send e-mail to one or more recipients to notify them that an alert situation has occurred. You can configure alerts for station or user activity or pending work.

There are also pre-defined system level alerts that automatically occur. For example, there is an automatic alert when one or more workstation is found to have a mismatched version of OCR for AnyDoc, CAPTUREit, or VERIFYit, or when the same user is logged on to multiple stations. For more information about pre-defined alerts, see System Level Alerts (page [91](#)).

For each configured alert, MANAGEit stops monitoring the alert after it has been generated 40 times. After the 40th occurrence, MANAGEit creates an alert to notify the user the maximum number of alerts has been reached.

### Station Activity Alert Settings

Station activity alerts are about conditions on individual workstations. You can set station activity alerts to occur when a workstation has been idle, is not running OCR for AnyDoc, has no work available, or has been in a specific processing phase for more than a specified number of minutes.

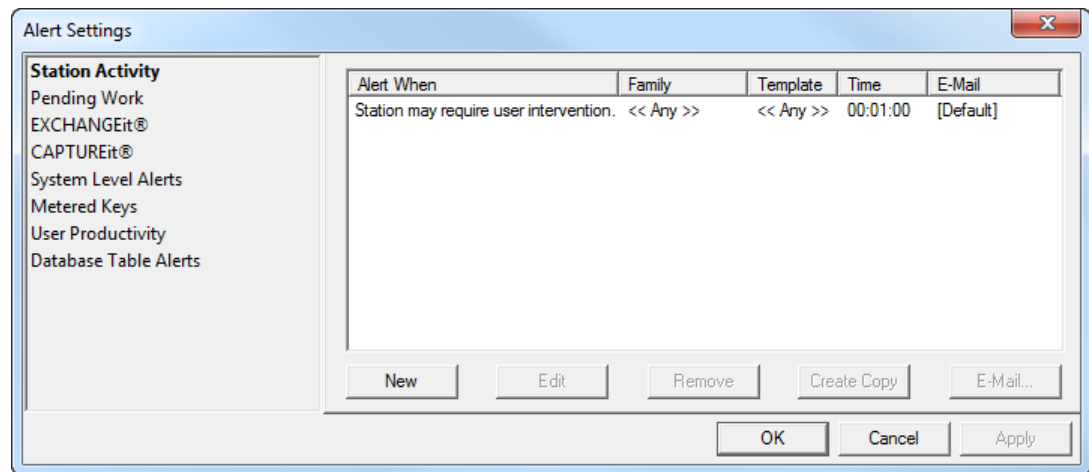
Station activity alerts display in the Alerts window and appear as a red exclamation point next to the applicable station or user in the Station/User Activity window. You also have the option of sending alert notifications via e-mail. MANAGEit only sends out alert e-mails during a refresh.

In addition to the alerts you can configure, the "Station may require user intervention" message can also be displayed. This alert means that the station has not been updating its status properly and should be manually checked for indications that its processing has been interrupted. This alert is on by default and cannot be edited or removed.

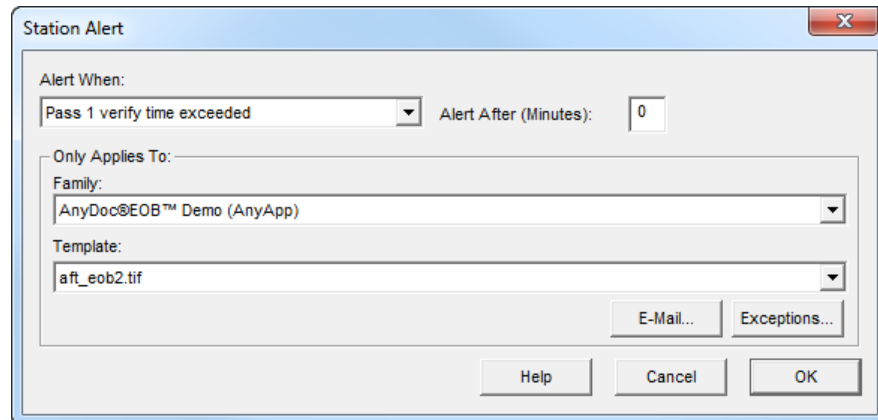
#### Steps

- 1 From the **Settings** menu, click **Alerts**.  
The **Alert Settings** window is displayed.

- Click the **Station Activity** tab.



- Either click the **New** button to create a new station alert  
OR  
Select an alert in the list and click **Edit** to change it.  
The **Station Alert** window is displayed.



- Select an option to set the situation that causes an alert from the **Alert When** drop-down list.
- Select a form family from the **Family** drop-down list to associate the alert selected in the Alert When drop-down list to the specified form family.
- Select a **Template** from the drop-down list to associate the alert selected in the Alert When drop-down list and the form family selected in the Family drop-down list to the template. This drop-down list is only available if Auditor time exceeded, Data Extraction time exceeded, EXCHANGEit Exceptions time exceeded, Pass 1 verify time exceeded, Pass 2 verify time exceeded, Supervisor Verify time exceeded, or Verification time exceeded is selected from the Alert When drop-down list.
- To set exception parameters for the alert, click the **Exceptions** button. See Alert Exceptions (page 78).

**Alert Settings**

- 8 Enter a number in the **Only Alert After "Alert When" Has Been Occurring For (Minutes):** field to set the number of minutes before the specified alert is generated.
- 9 Click **OK**.
- 10 To set the e-mail settings, see Set E-Mail Alert Settings (page 97).
- 11 Click **OK**.

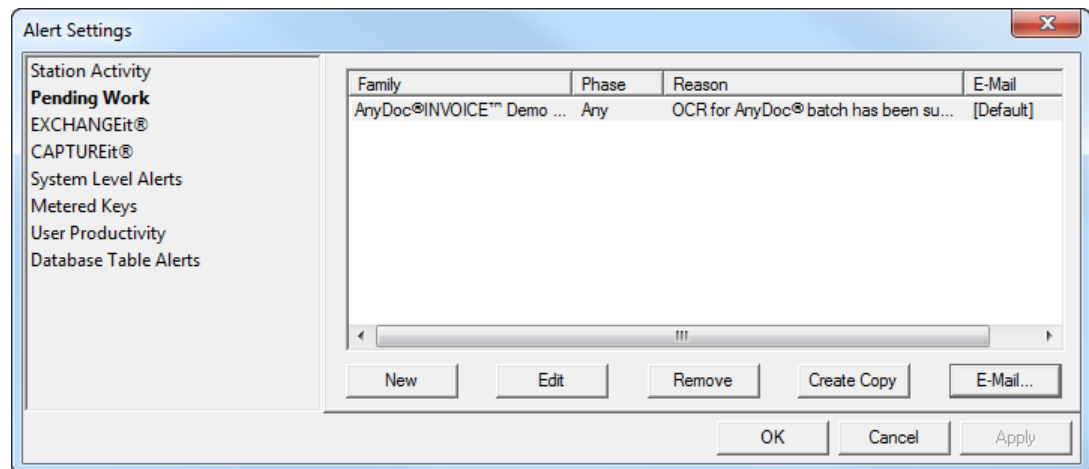
## Pending Work Alert Settings

Pending work alerts apply to pending batches and form families. Pending work alerts display in the Alerts window and appear as a red exclamation point next to the applicable form family or batch in the Pending Work window. There is also the option of sending alert notifications via e-mail.

### Create New Pending Work Alerts

#### Steps

- 1 From the **Settings** menu, click **Alerts**.  
The **Alert Settings** window is displayed, listing any previously created alerts.
- 2 Click the **Pending Work** tab.



- 3 Click **New**.  
The **Alert Type** window is displayed.
- 4 Select the type of alert that should be created. Options include:
  - **Batch Alert.** Specify the following:
    - **Family**  
The form family associated with the alert.



- **Phase**

The processing phase the alert should be applied to.

- **Ignore Batches that are Suspended**

Select this check box to stop sending alerts for suspended batches.

- **Alert When Number of Images**

Generates an alert when the number of images in pending batches for the specified form family or phase either exceeds a specified number or is less than a specified number, then enter a number in either the **Exceeds** or **Is Less Than** field.

- **Alert When Number of DocSets**

Generates an alert when the number of docsets in pending batches for the specified form family or phase either exceeds a specified number or is less than a specified number, then enter a number in either the **Exceeds** or **Is Less Than** field.

- **Ignore 0**

Does not trigger an alert if there are zero images or docsets.

- **Alert When Older Than (Hours)**

Generates an alert when there is a pending batch for the specified form family or phase that is older than the specified number of hours from the scan or import time. By default, the **Use Scan Time Instead of Import Time** check box is selected. To use the Import time, clear this check box.

- **Alert When a Batch Becomes Suspended**

Generates an alert when a pending batch for the specified form family or phase is suspended.

- **E-mail**

To set the e-mail settings, see Set E-Mail Alert Settings (page 97).

- **Import Alert.** Specify the following:

- **Form Family Name**

The form family associated with the alert.

- **Maximum Number of Items**

An alert is generated when the number of items pending import exceeds this number.

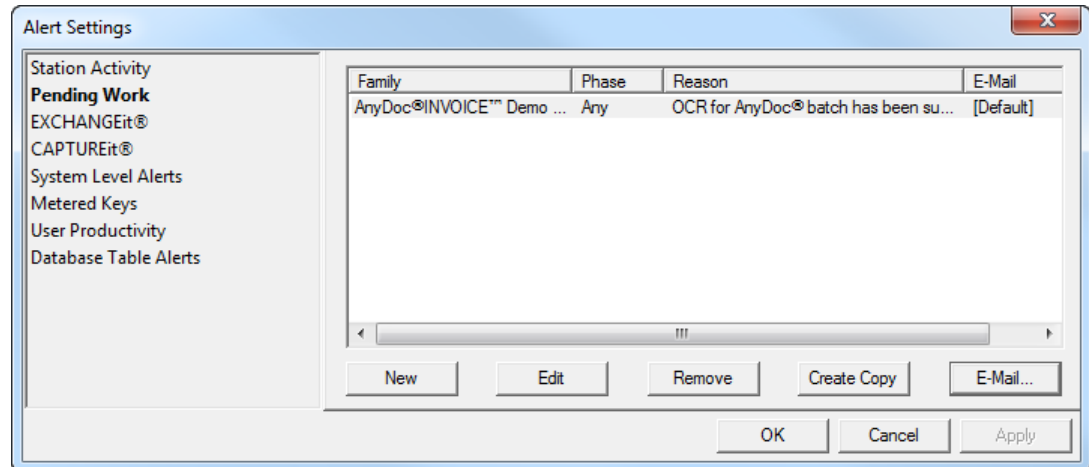
5 Click **OK**.

**Alert Settings**

## Edit A Pending Work Alert

**Steps**

- 1 From the **Settings** menu, click **Alerts**.  
The **Alert Settings** window is displayed, listing any previously created alerts.
- 2 Click the **Pending Work** tab.



- 3 Select an alert from the list and click **Edit**.  
The **Alert** window is displayed.
- 4 Modify the alert, as necessary.
- 5 Click **OK**.

## EXCHANGEit Alert Settings

Alerts can be set to occur when an EXCHANGEit workstation or job is in specific processing state for more than the specified number of minutes.

The following two rules are created by OnBase AnyDoc and cannot be modified or deleted:

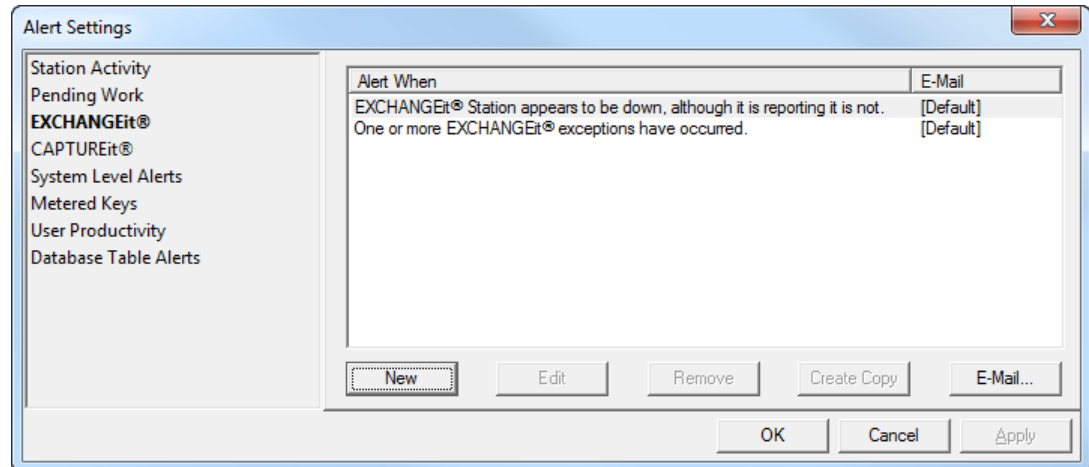
- EXCHANGEit station appears to be down, but is reported as running.  
This alert should only be triggered if an EXCHANGEit station exits abnormally. For example, a computer loses power or the process ended in the task manager.
- One or more EXCHANGEit exceptions have occurred.  
EXCHANGEit has database exceptions that require user intervention to resolve.

EXCHANGEit activity alerts display in the Alerts window and appear as a red exclamation point next to the applicable station in the EXCHANGEit Activity window.

## Create New EXCHANGEit Alerts

### Steps

- 1 From the **Settings** menu, click **Alerts**.  
The **Alert Settings** window is displayed.
- 2 Click the **EXCHANGEit** tab.



- 3 Click **New**.  
The **Alert Type** window is displayed.
- 4 Select the type of alert that should be created. Options include:
  - **Import Alert.** Specify the following:
    - **Job Name**  
The job associated with the alert.
    - **Maximum Number of Items**  
An alert is generated when the number of items imported exceeds this number.
  - **Job Alert**
    - **Maximum Job Age \_\_\_\_\_ minutes**  
An alert is generated when a job is older than the specified time.
    - **E-mail**  
To set the e-mail settings, see Set E-Mail Alert Settings (page 97).
  - **Station Alert.** Specify the following:
    - **Process**

**Alert Settings**

- **Ignore manual Runs**

Ignores jobs that are run manually.

- **Job Name**

The name of the EXCHANGEit job. If this information is not specified then the alert is applied to all jobs.

- **XJB Name**

The .xjb file name associated with the alert.

- **Maximum number of minutes that are allowed to pass before displaying the alert**

- **E-mail**

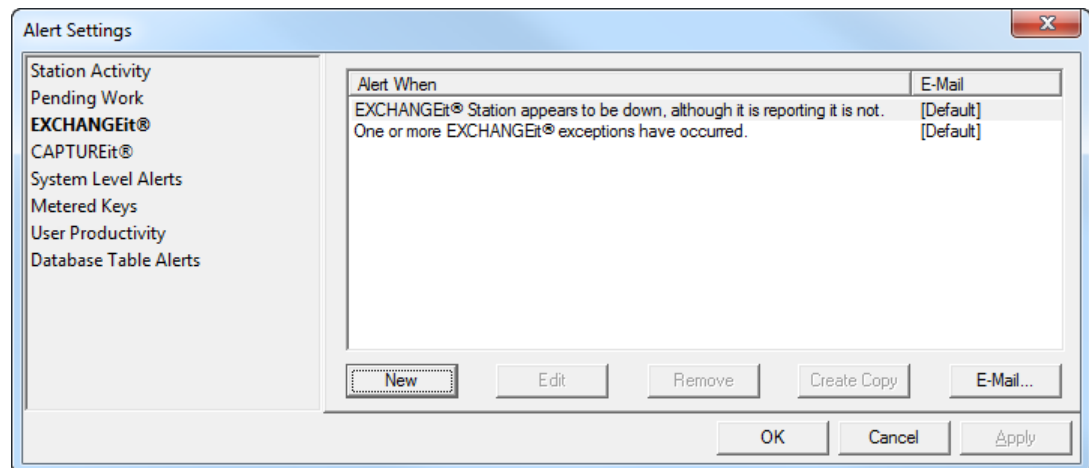
To set the e-mail settings, see Set E-Mail Alert Settings (page 97).

5 Click **OK**.

## Edit An EXCHANGEit Alert

### Steps

- 1 From the **Settings** menu, click **Alerts**.  
The **Alert Settings** window is displayed.
- 2 Click the **EXCHANGEit** tab.



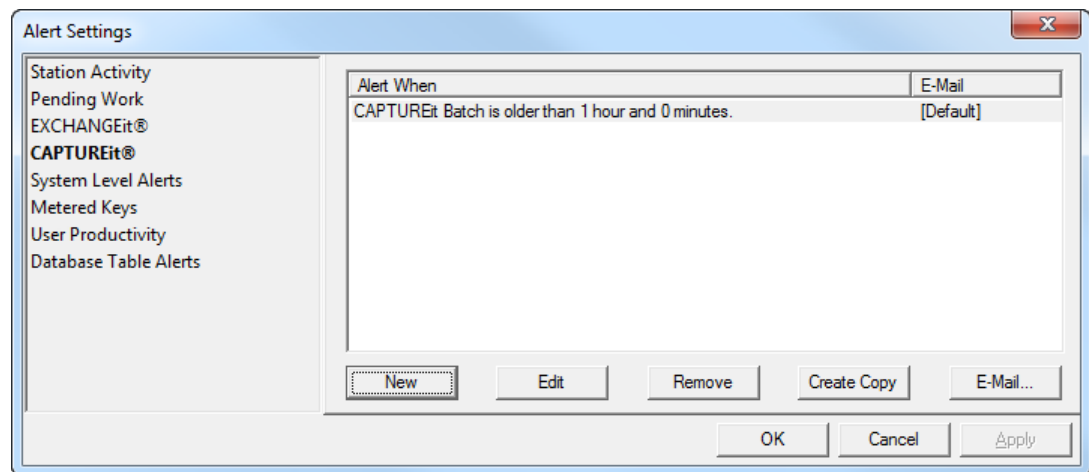
- 3 Select an alert and click **Edit**.  
The **Alert** window is displayed.
- 4 Modify the alert, as necessary.
- 5 Click **OK**.

## CAPTUREit Alert Settings

Alerts can be set to occur when a batch is older than the specified number of minutes. When creating an alert rule it is applied to all batches. CAPTUREit activity alerts display in the Alerts window and appear as a red exclamation point next to the applicable station or user in the CAPTUREit Activity window.

### Steps

- 1 From the **Settings** menu, click **Alerts**.  
The **Alert Settings** window is displayed.
- 2 Click the **CAPTUREit** tab.



- 3 To create a new alert, click **New**.  
OR  
To change an existing alert, select an alert from the list and click **Edit**.  
The **CAPTUREit Alert** window is displayed.
- 4 Enter the **Maximum Batch Age**, in minutes, that must be reached before alerts are generated.
- 5 To set the e-mail settings, see Set E-Mail Alert Settings (page 97).
- 6 Click **OK**.

## System Level Alert Settings

System level alerts concern conditions that can potentially cause system problems. These alerts are predefined in MANAGEit and are always activated. The list of system level alerts can be viewed, but not changed in the Alerts window.

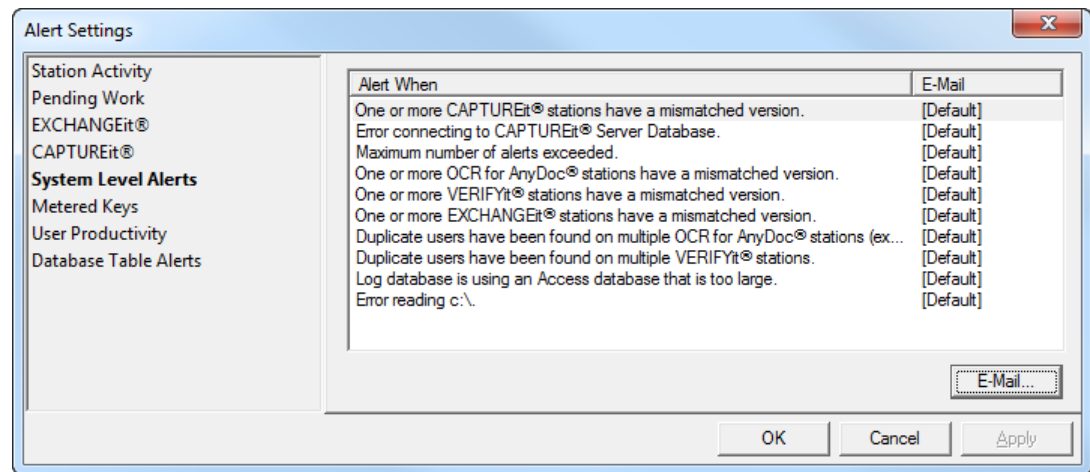
### Steps

- 1 From the **Settings** menu, click **Alerts**.

## Alert Settings

The **Alert Settings** window is displayed.

- Click the **System Level Alerts** tab.



The system level alerts are:

- One or more CAPTUREit® stations have a mismatched version.

Every CAPTUREit workstation must use the same version of the application. This alert occurs when one or more workstations is running a different version number. Upgrade all stations to the same version.

If one or more station is inactive then this alert is not displayed.

- Error Connecting to CAPTUREit Server Database.

MANAGEit cannot connect to the CAPTUREit Server database.

- Maximum number of alerts exceeded.

MANAGEit stops monitoring each configured alert after it has been generated 40 times. This alert occurs when the maximum number of 40 alerts has been generated for a configured alert.

- One or more OCR for AnyDoc® stations have a mismatched version.

Every OCR for AnyDoc workstation must use the same version of OCR for AnyDoc. This alert occurs when one or more workstations is running a different version number. Upgrade all stations to the same version.

If one or more station is inactive then this alert is not displayed.

- One or more VERIFYit stations have a mismatched version.

Every VERIFYit workstation must use the same version of the application. This alert occurs when one or more workstations is running a different version number. Upgrade all stations to the same version.

If one or more station is inactive then this alert is not displayed.

- One or more EXCHANGEit stations have a mismatched version.  
Every EXCHANGEit workstation must use the same version of the application. This alert occurs when one or more workstations is running a different version number. Upgrade all stations to the same version.  
If one or more station is inactive then this alert is not displayed.
  - Duplicate users have been found on multiple OCR for AnyDoc® stations.  
More than one active OCR for AnyDoc workstation (not running as a service) is logged on with the same user name. Each workstation needs to be logged on with a different user name; exit OCR for AnyDoc on one of the workstations and log it back on with a different user name.  
If one or more station is inactive then this alert is not displayed.
  - Duplicate users have been found on multiple VERIFYit stations.  
More than one active VERIFYit workstation is logged on with the same user name. Each workstation needs to be logged on with a different user name; exit VERIFYit on one of the workstations and log it back on with a different user name.  
If one or more station is inactive then this alert is not displayed.
  - Log database is using an Access database that is too large.  
The database is close to 2 GB in size, which is the maximum size allowed.
  - Error reading x:\.  
Where x is the drive for a control path. MANAGEit cannot access the control path and so cannot monitor OCR for AnyDoc or VERIFYit workstations using that control path. This alert can occur if you have network problems or if the server is down or unavailable for some reason. It can also occur if the drive is not properly mapped in MANAGEit.
- 3 To set the e-mail settings, see Set E-Mail Alert Settings (page 97).
  - 4 Click **OK**.

## Metered Keys Alert Settings

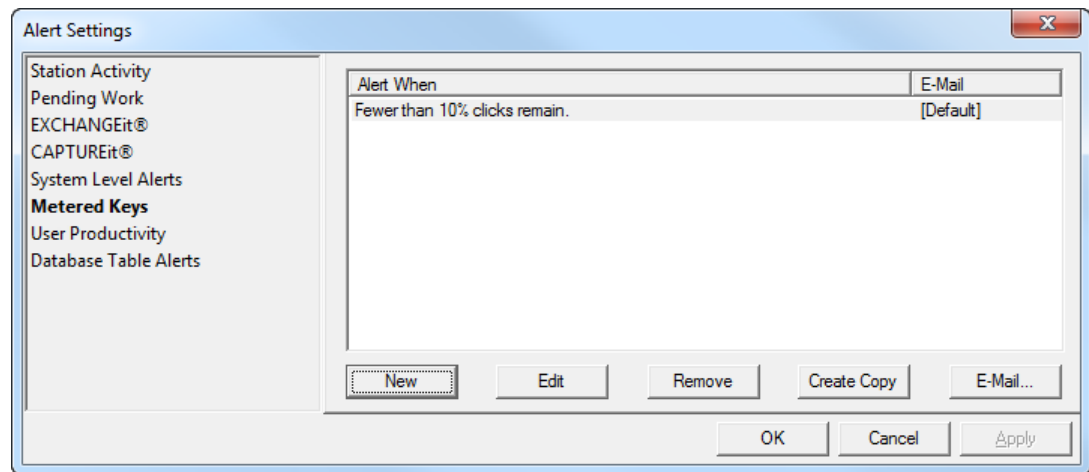
Alerts can be set for when the metered application falls below a specified minimum.

### Steps

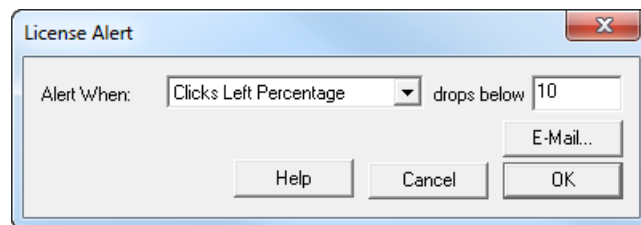
- 1 From the **Settings** menu, click **Alerts**.  
The **Alert Settings** window is displayed.

**Alert Settings**

- Click the **Metered Keys** tab.



- Click the **New** button.  
The **License Alert** window is displayed.



- Select an option from the **Alert When** drop down list and enter a number in the **drops below** field to specify when the alert should be sent. Options include:
  - Any Percentage**  
 An alert is sent when the percentage specified in the drops below field is reached.
  - Clicks Left**  
 An alert is sent when the clicks remaining on the key falls below the number entered in the drops below field is reached.
  - Clicks Left Percentage**  
 An alert is sent when clicks remaining on the key falls below the percentage specified in the drops below field is reached.
  - Days Left**  
 An alert is sent when the days left on the key falls below the number entered in the drops below field is reached.
  - Days Left Percentage**  
 An alert is sent when the days remaining on the key falls below the percentage specified in the drops below field is reached.



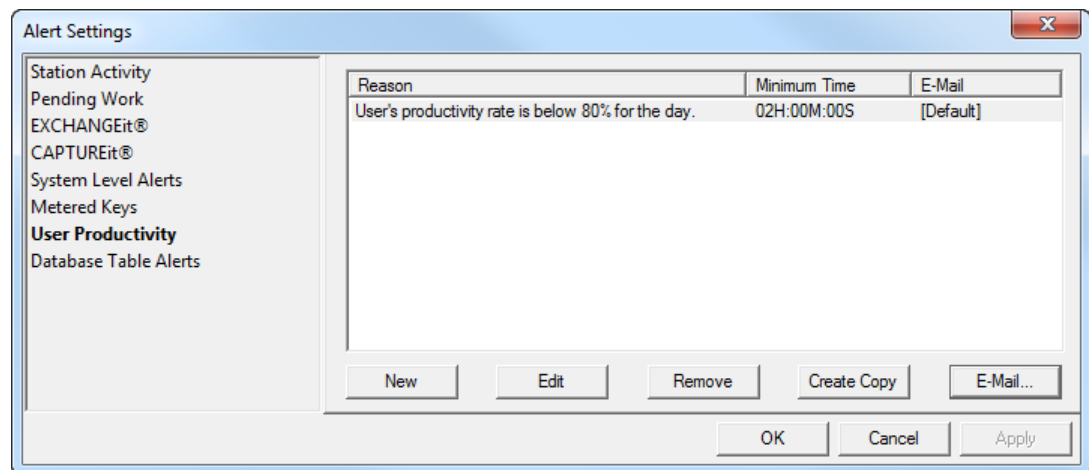
- 5 Click **OK**.
- 6 To set the e-mail settings, see Set E-Mail Alert Settings (page 97).
- 7 Click **OK** to save the alert.

## User Productivity Alert Settings

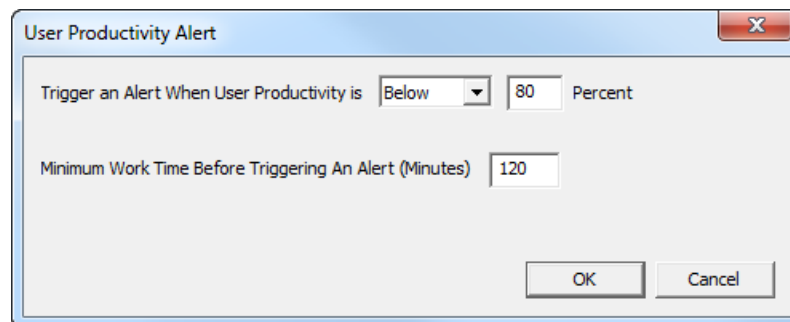
User Productivity is an administrative tool allowing productivity goals to be set for Verification operators by form family in OCR for AnyDoc. Alerts can be sent when a user's productivity is above or below a specific point during the day.

### Steps

- 1 From the **Settings** menu, click **Alerts**. The **Alert Settings** window is displayed.
- 2 Click the **User Productivity** tab.



- 3 To create a new pending work alert, click **New**.  
OR  
To change an existing alert, select an alert from the list and click **Edit**.  
The **User Productivity Alert** window is displayed.



- 4 Specify when to trigger the alert. It can be triggered when a **User Productivity** is **Above** or **Below** the specified **Percent**.

**Alert Settings**

- 5 Specify the **Minimum Work Time before Triggering An Alert (Minutes)**.
- 6 Click **OK**.
- 7 To set the e-mail settings, see Set E-Mail Alert Settings (page [97](#)).
- 8 Click **OK** to save the alert.

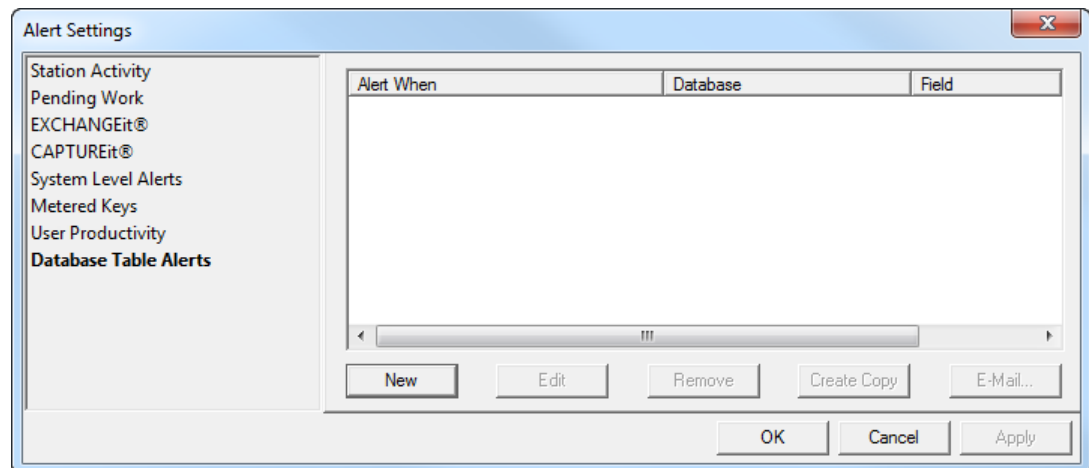
## Database Table Alert Settings

Alerts can be set based on when the database table fails to meet the specified criteria. When creating alerts, the data type must be set for any fields associated with the alert triggers. Alerts are displayed in the same manner all other alerts are displayed. However, the specified field is highlighted in red.

The available Alert settings are based on the Database settings specified in the Database Table Settings window. For more information, see Monitoring Database Tables (page [74](#)).

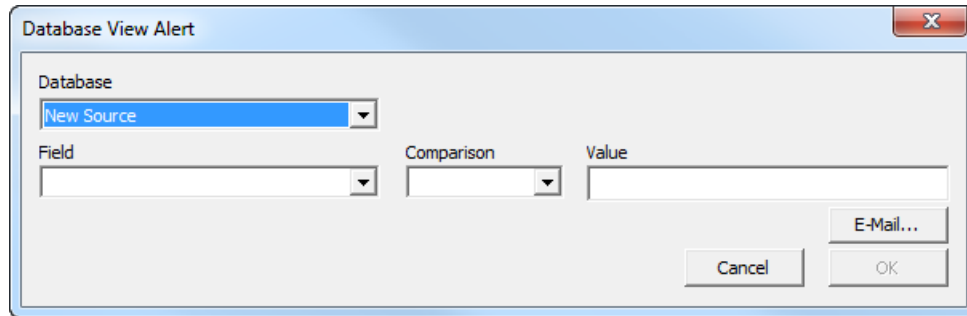
### Steps

- 1 From the **Settings** menu, click **Alerts**.  
The **Alert Settings** window is displayed.
- 2 Click the **Database Table Alerts** tab.



- 3 Click the **New** button.

The **Database View Alert** window is displayed.



- 4 Select an option from the **Database** drop-down list.
- 5 Select the **Field** used in the alert.
- 6 Select an option in the **Comparison** field to specify when the alert should be sent. Options include:
  - **Elapsed (Hours)**  
Only available for a Date/Time field type. The alert is generated if the current date and time is greater than the number of hours specified in the **Value** field.
  - **Elapsed (Minutes)**  
Only available for a Date/Time field type. The alert is generated if the current date and time is greater than the number of minutes specified in the **Value** field.
  - **Equals**
  - **Greater Than**
  - **Less Than**
- 7 Enter a **Value** for the field name to be compared to.
- 8 To set the e-mail settings, see Set E-Mail Alert Settings (page 97).
- 9 To save the alert, click **OK**.

## Set E-mail Alert Settings

Notification messages can be sent to e-mail recipient groups when specific alerts occur. E-mail settings are set and applied to each individual alert.

Before you can specify e-mail recipients in the Alert E-mail Settings window, you must configure the e-mail server in Settings | MANAGEit Application Settings | E-Mail Server. For more information, see E-mail Server (page 14).

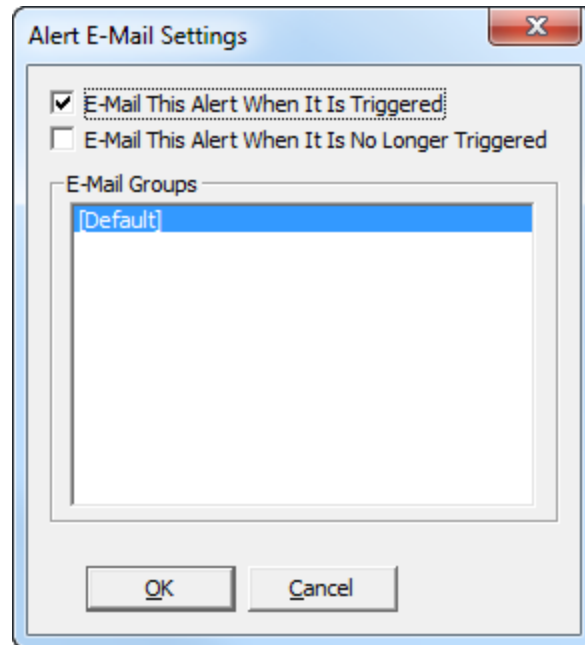
### Steps

- 1 Do one of the following:

## Alert Settings

- On the **Alert Settings** window, select an alert on any tab and Click **E-mail**.
- Double-click an alert and on the **Station Alert** window, select **E-mail**.

The **Alert E-mail Settings** window is displayed.



- 2 To send the alert e-mail when a condition occurs that causes the alert to be triggered, select the **E-mail This Alert When It Is Triggered** check box.
- 3 To send the alert e-mail when the condition that previously caused the alert to be triggered no longer exists, select the **E-mail This Alert When It Is No Longer Triggered** check box.
- 4 Select the **E-mail Group** that will receive the alert e-mails.
- 5 Click **OK**.

## Copy an Alert

### Steps

- 1 Select the alert from the list and click **Create Copy**.  
The **Alert** window is displayed with the original Alert settings selected.
- 2 Modify the alert as needed.
- 3 Click **OK**.

## Remove An Alert

### Steps

- 1** Select the alert from the list and click **Remove**.
- 2** Click **OK**.

# Chapter 8

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## Log Database and System Maintenance

The log database is an optional tool that logs and maintains detailed information on OCR for AnyDoc batch processing. The log database contains committed, historical data. By default, the production log database is stored in the current control path. The log database is enabled/disabled by form family. Enabled by default, the data the log database provides can be useful in optimizing or troubleshooting the batch process. Whether or not the log database is maintained for a form family is set through Settings | OCR for AnyDoc Form Family Management | Batch Control. See Batch Control Parameters (page [261](#)).

MANAGEit provides you with the following options for the log database:

- Create or delete backup copies of the log database (page [100](#))
- View the log database (page [101](#))
- Purge the log database (page [117](#))

Also see Log Database Schema (page [407](#)) for details on the log database tables and fields.

MANAGEit also provides the following maintenance options for the Audit database and OCR for AnyDoc batch history log files:

- Purge the Audit Database (page [119](#))
- Delete Batch History Log

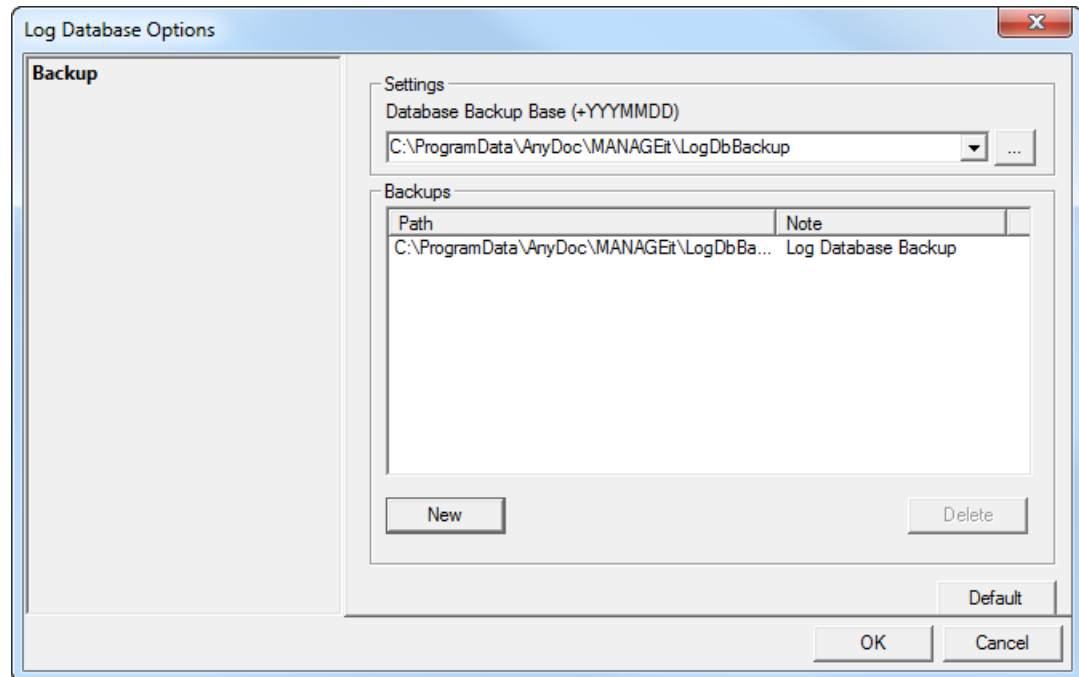
### Create or Delete a Backup Copy

MANAGEit allows you to create and delete backup copies of the Access log database. This option does not apply to other database types, such as SQL or Oracle.

Backup copies are useful to retrieve information that has been purged from the current database. Backup copies are also useful if you are purging the production database, but need to run a report on an older version of the database.

#### Steps

- 1 Select **Settings | Databases | Backup Log Database (Access only)**. The **Log Database Options** window is displayed.



- 2 Specify the default base path for all backups in the **Database Backup Base (+YYYYMMDD)** field. The default location is C:\ProgramData\AnyDoc\MANAGEit\LogDbBackup. It is recommended that you always use the same base path.
- 3 Click **New**. The new subdirectory name is created for you by appending the current date (YYYYMMDD) to the base path. A message is displayed asking you to confirm the path.
- 4 Click **Yes** to confirm the path. AutoFlow is paused on all stations. The log database backup is created and placed in the specified subdirectory. The path name is displayed in the Backups pane. AutoFlow resumes when the copy is completed.
- 5 To delete a backup copy of the log database, click the copy to delete in the **Backups** pane and click **Delete**. The selected backup log database is deleted.

## View the Log Database

The Log Database Viewer shows cumulative statistics for all batches processed. The Log Database Viewer uses the live log database, even when a backup copy is in use for reporting.

## Log Database and System Maintenance



Only batches Scanned/Imported after the log database is enabled for the Form Family are recorded in the log database. If the log database is disabled when a batch is Imported, that batch is not included in the log database, even if you enable the log database and restart the batch.

The log database records information for all processing that takes place, even if an image or an entire batch passes through the same phase more than once. For example, if an image in Verification is sent back to QA Review, then passes through Verification a second time, each step is recorded.

Unless a batch is deleted, the log database is only updated during two processing phases, Import and Commit. After a batch is imported, information is accumulated about the batch as it passes through the various processing phases, then written to the log database when the batch is committed. The batch is not committed or deleted if this data is not successfully added to the database.

The Log Database Viewer provides information at different levels:

<b>Form Family</b>	Provides a summary of processing by form family.
<b>Batches</b>	Provides a summary of batches processed in one form family.
<b>Images</b>	Provides a summary of the images processed in one batch.
<b>Processes</b>	Summarizes the processing phases performed on one image.
<b>Details</b>	Provides the details for one processing phase on one image.

### Steps

- 1 Select **View | Log Database | Viewer**.



The **Log Database Viewer** window is displayed.

The screenshot shows the 'Log Database Viewer' window. It features a table with the following data:

	FamilyName	BatchCount	ResubmitCount	RestartCount	ImageCount	DocSetCount	T
1	1999aiim.fof	1	0	0	5	0	0
2	aft_eob.fof	9	0	0	36	9	11
3	aftdemo.fof	1	0	0	4	0	0
4	aftdemo.fof	1	0	0	4	0	0
5	europa.fof	1	0	0	5	0	0
6	hcfa.fof	4	1	13	16	0	0
7	seabcr.fof	1	0	0	21	0	0

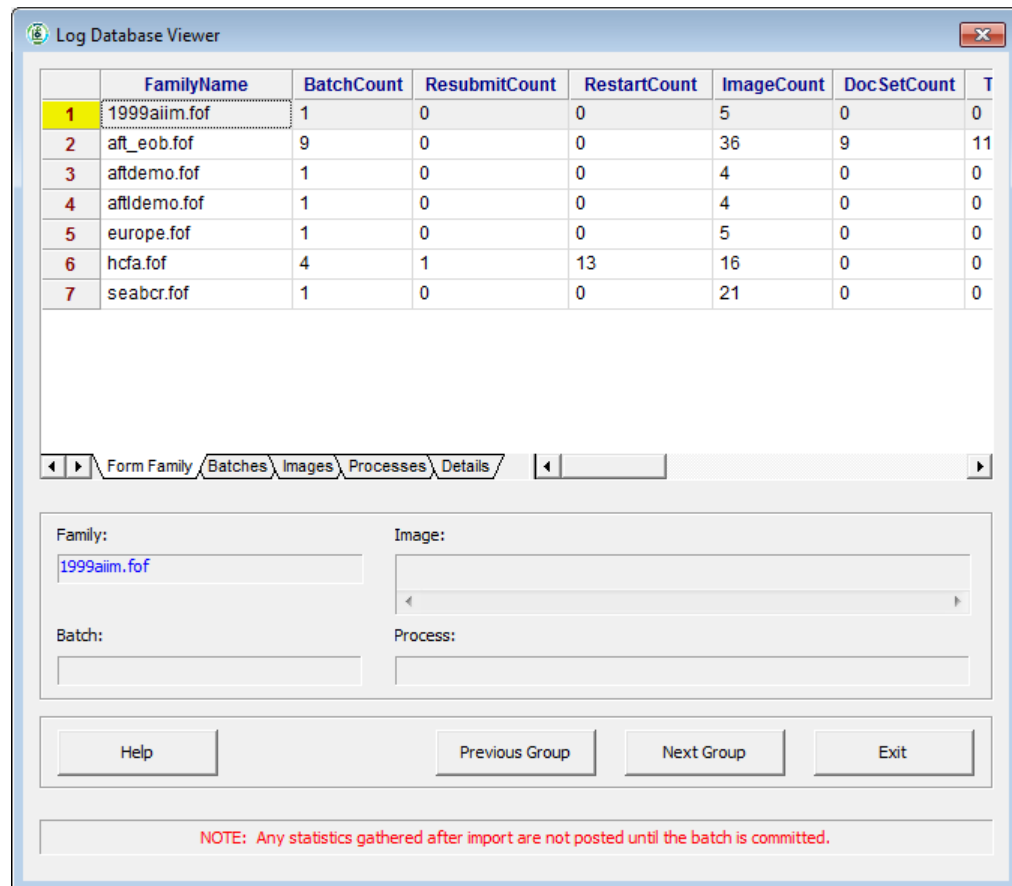
Below the table are navigation tabs: Form Family, Batches, Images, Processes, and Details. The 'Form Family' tab is currently selected. Below the tabs are input fields for 'Family:' (containing '1999aiim.fof'), 'Image:', 'Batch:', and 'Process:'. At the bottom are buttons for 'Help', 'Previous Group', 'Next Group', and 'Exit'. A red note at the very bottom states: 'NOTE: Any statistics gathered after import are not posted until the batch is committed.'

- 2 On the **Form Family** tab, click a form family.
- 3 Click the **Batches** tab to view batches for that form family.
- 4 Select a batch, then click the **Images** tab to view images in that batch.
- 5 Continue to drill down by selecting an entry in the **Process** and **Details** tabs, to view more details about the selected entries.
- 6 Click **Exit**.

## Log Database and System Maintenance

## Log Database Viewer | Form Family Tab

In the Form Family tab, the Log Database Viewer shows processing totals by form family.



	FamilyName	BatchCount	ResubmitCount	RestartCount	ImageCount	DocSetCount	T
1	1999aiim.fof	1	0	0	5	0	0
2	aft_eob.fof	9	0	0	36	9	11
3	aftdemo.fof	1	0	0	4	0	0
4	aftdemo.fof	1	0	0	4	0	0
5	europa.fof	1	0	0	5	0	0
6	hcfa.fof	4	1	13	16	0	0
7	seabcr.fof	1	0	0	21	0	0

Family: 1999aiim.fof Image:   
 Batch: Process:   
 Help Previous Group Next Group Exit   
 NOTE: Any statistics gathered after import are not posted until the batch is committed.

The columns appearing in the Form Family tab are:

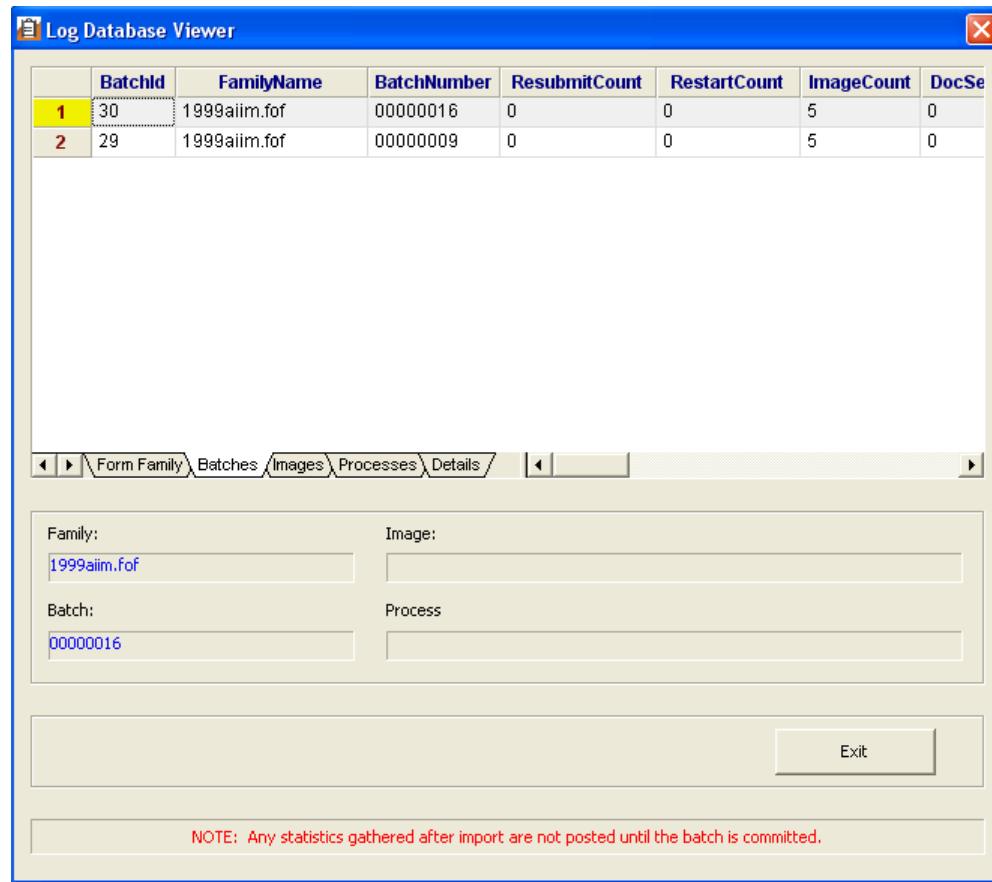
Option	Description
FamilyName	The form family file name.
BatchCount	The number of batches processed for the form family.
ResubmitCount	The number of times batches have been resubmitted.
RestartCount	The number of times batches have been restarted.
ImageCount	The number of images that have been processed.
DocSetCount	The number of document sets that have been processed.
BatchTotal	If a batch balancing equation is used for the Form Family, this is the total from all batches processed.

Option	Description
TotalChars	The total number of characters extracted in all passes through the Extraction phase.
TotalQuestionable	The number of questionable characters.
TotalKeystrokes	The number of Verification keystrokes in all Verification phases.
TotalCorrected	The number of questionable characters corrected by Verification operators.
TotalOther	The number of corrections by Verification operators that were not questionable characters.
TotalDblKeystrokes	The number of keystrokes during double-key Verification after the first entry.
TotalDblRows	The number of rows (Verification lines) submitted for double-key Verification.
TotalNotes	The number of supervisor Sticky Notes attached in all phases.
QA	The number of times batches were processed via the QA phase. This does not include Rescan or Review, which are used to process individual images.
TotalExtracted	The number of images to which data Extraction was applied. This does not include attachments, since no data is extracted from those images. This number includes multiple passes on the same image if an image was sent back to Extraction or to an earlier phase.
TotalVerified	The number of images submitted to Verification operators for processing. This does not include images that are assigned but are then skipped because no processing is required (e.g., advance to first questionable is turned on and there are no questionable characters on the image).
Total Attachments	The number of images that were flagged as attachments when the batches were Committed.
TotalDeleted	The number of images flagged as deleted when the batches were Committed, deleted, or rerouted.
TotalRouted	For future implementation. The number of images flagged as rerouted when the batches were Committed, deleted, or rerouted.
TotalBypassVerify	The number of images that bypassed Verification.
TotalNotRegistered	The number of images that failed registration during Extraction. This only includes the last registration attempted for an image, not any previous failed attempts for images later flagged as attachments.

## Log Database and System Maintenance

## Log Database Viewer | Batches Tab

In the Batches tab, the Log Database Viewer shows processing totals by batch for the form family selected in the Form Family tab.



	BatchId	FamilyName	BatchNumber	ResubmitCount	RestartCount	ImageCount	DocSe
1	30	1999aiim.fof	00000016	0	0	5	0
2	29	1999aiim.fof	00000009	0	0	5	0

Family: 1999aiim.fof Image:   
Batch: 00000016 Process:   
Exit

NOTE: Any statistics gathered after import are not posted until the batch is committed.

The columns appearing in the Batches tab are:

Field	Description
BatchID	A unique sequential number assigned by the system. This is used as the primary key to uniquely identify the batch and to link records from other tables. When a batch is resubmitted after Commit (or reimported with the same batch number), a new log database record is created with a new batch ID. When a batch is restarted, it is not assigned a new batch ID. This ID is saved in a file in the batch directory to provide rapid access to the batch record. Never changed.
FamilyName	The form family file name.
BatchNumber	The eight-digit system assigned batch number.
ResubmitCount	The number of times this batch has been resubmitted. A new log database record is created each time a batch is resubmitted. This allows

**Log Database and System Maintenance**

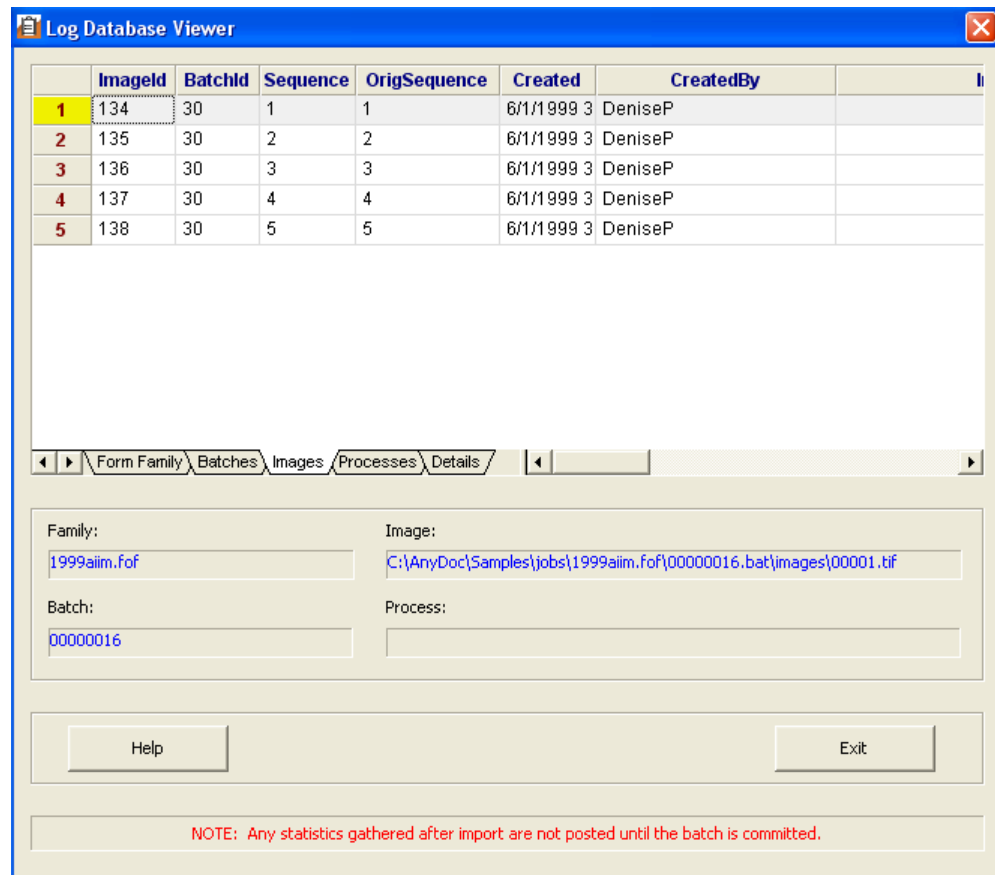
<b>Field</b>	<b>Description</b>
	a batch record to be associated only with processing done from the time the batch was created to the time it was Committed. A resubmit is a new "creation" of the batch.
RestartCount	The number of times the batch has been restarted.
ImageCount	The number of images in the batch. This number may increase if new images are added via Rescan or Review. The number never decreases, because images are never removed from the count. They may be flagged as deleted or rerouted. Deleted and rerouted flags are removed if the batch is restarted.
DocSetCount	The number of document sets in the batch. If document sets are determined at Scan/Import, this value is set when the batch is created. It is always updated at Commit with the final number of document sets.
Created	The batch creation date/time. This can be used as a key to find batches created within a specified interval. Never changed.
CreatedBy	The Import operator who created the batch (regardless of the source of the batch). Never changed.
ScannedBy	The operator who scanned the batch. Never changed.
Committed	The batch Commit/delete/reroute date/time. This can be used as a key to find batches committed within a specified interval. Only set once.
CommittedBy	The operator who Committed/deleted/rerouted the batch. Only set once.
Phase	The current state of the batch: 0 Active 100 Deleted 101 Rerouted 102 Committed
Deleted	The date and time the batch was deleted. Only set once.
DeletedBy	The operator who deleted the batch. Only set once.
DeletePhase	The phase during which the batch was deleted or rerouted. Only set once.
DeleteReason	The reason given by the user for deleting or rerouting the batch, if applicable. Only set once.
ControlNumber	The user defined batch control number. May be used as a non-unique key to locate batches by control number. May be blank. Never changes.
BatchTotal	If a batch balancing equation is used for the form family, this is the batch total.
TotalChars	The number of characters extracted in all passes through the Extraction phase.

**Log Database and System Maintenance**

<b>Field</b>	<b>Description</b>
TotalQuestionable	The number of characters flagged as questionable.
TotalKeystrokes	The number of Verification keystrokes in all Verification phases.
TotalCorrected	The number of questionable characters corrected by Verification operators.
TotalOther	The number of characters corrected by Verification operators that were not flagged as questionable.
TotalDbkKeystrokes	The number of keystrokes during double-key Verification after the first entry.
TotalDbkRows	The number of rows (Verification lines) submitted for double-key Verification.
TotalNotes	The number of supervisor Sticky Notes attached in all phases.
QA	The number of times the batch was processed via any of the QA phases. This includes QA, Review, and Rescan.
TotalExtracted	The number of images to which data Extraction was applied. This does not include Attachments, since no data is extracted from those images. This number includes multiple passes on the same image if an image was sent back to Extraction or to an earlier phase.
TotalVerified	The number of images submitted to Verification operators for processing. This does not include images that are assigned but are then skipped because no processing is required. For example, the Advance to first questionable option is turned on and there are no questionable characters on the image.
TotalAttachments	The number of images that were flagged as attachments when the batch was Committed.
TotalDeleted	The number of images flagged as deleted when the batch was Committed, deleted, or rerouted.
TotalRouted	For future implementation. The number of images flagged as rerouted when the batch was Committed, deleted, or rerouted.
TotalBypassVerify	The number of images that bypassed Verification.
TotalNotRegistered	The number of images that failed registration during Extraction. This only includes the last registration attempted for an image, not any previous failed attempts for images later flagged as attachments.
TotalSetCount	For an AnyApp batch using EOB total sets, this is the number of total sets, in the batch.
LineItemCount	For an AnyApp batch using detail grids, this is the number of line items in the batch.
SourceBatch	Indicates all images in this batch were rerouted from the specified source batch.

## Log Database Viewer | Images Tab

In the Images tab, the Log Database Viewer shows summary information by image for the batch selected in the Batches tab.



	ImageId	BatchId	Sequence	OrigSequence	Created	CreatedBy
1	134	30	1	1	6/1/1999 3	DeniseP
2	135	30	2	2	6/1/1999 3	DeniseP
3	136	30	3	3	6/1/1999 3	DeniseP
4	137	30	4	4	6/1/1999 3	DeniseP
5	138	30	5	5	6/1/1999 3	DeniseP

Family: 1999aim.fof Image: C:\AnyDoc\Samples\jobs\1999aim.fof\00000016.bat\images\00001.tif

Batch: 00000016 Process:

Help Exit

NOTE: Any statistics gathered after import are not posted until the batch is committed.

To view the actual image, select the image, then click the **View Image** button to look at it in the Image Viewer.

The columns appearing in the Images tab are:

Field	Description
ImageID	A unique sequential number assigned by the system. This is used as the primary key to uniquely classify the image and to link records from other tables. This ID is saved in a file in the batch directory to provide rapid access to the image record. Never changed.
BatchID	Foreign key to ADBatch table. This is used as a key to locate images associated with a batch. Never changed.
Sequence	The current image sequence number within the batch. This is included

**Log Database and System Maintenance**

<b>Field</b>	<b>Description</b>
	with BatchID in a key to locate a specific image in a batch. This number may change if images are reordered.
OrigSequence	The image's original sequence number within the batch when it was Imported or appended. Never changed.
Created	The image creation date/time. This is the creation date/time of the file. It represents the scan time for scanned images, the reception time for faxed images, or the creation time for image files created by other means. Never changed.
CreatedBy	The operator who created the image. For images scanned by OCR for AnyDoc, it is the Scan station operator. Otherwise, it is the Import operator. For images appended to the batch after Import, such as in Quality Assurance, it is the operator who appended the image. Never changed.
Imprinter	The imprinter string. Never changed.
ImportName	The original name of the imported image file before Import with the full path. Never changed.
ImportPageNum	The page number within a multipage Import image file, or 0 if it was a single page image file. Never changed.
Phase	For future implementation. The image's current processing phase.
OutputName	The output image file name at Commit with the full path.
PageNumber	The page number of the image within a multipage image output file, or 0 if it was a single page image file. Only set once.
TextName	The output text file name with the full path. Only set once.
Template	The name of the template to which the image was identified ("attachmnt" if an Attachment). Does not include the .FRF extension.
IDMethod	The method used to classify the template, such as ID Phase or ID Exceptions. The XIDType table provides the translation of these numbers into text descriptions.
Origin	The origin of the image. For example, Scanner, Import, Fax, Resubmit, or Insert. The XOrigin table provides the translation of these numbers into text descriptions.
Attachment	Indicates if the image is an attachment. The value is one if the image is an attachment. Otherwise it is zero.
Verified	Indicates the number of times the image has been Verified.
Deleted	Indicates if the image has been deleted. The value is one if the image has been deleted. Otherwise it is zero.
Routed	Indicates if the image has been rerouted. The value is one if the image has

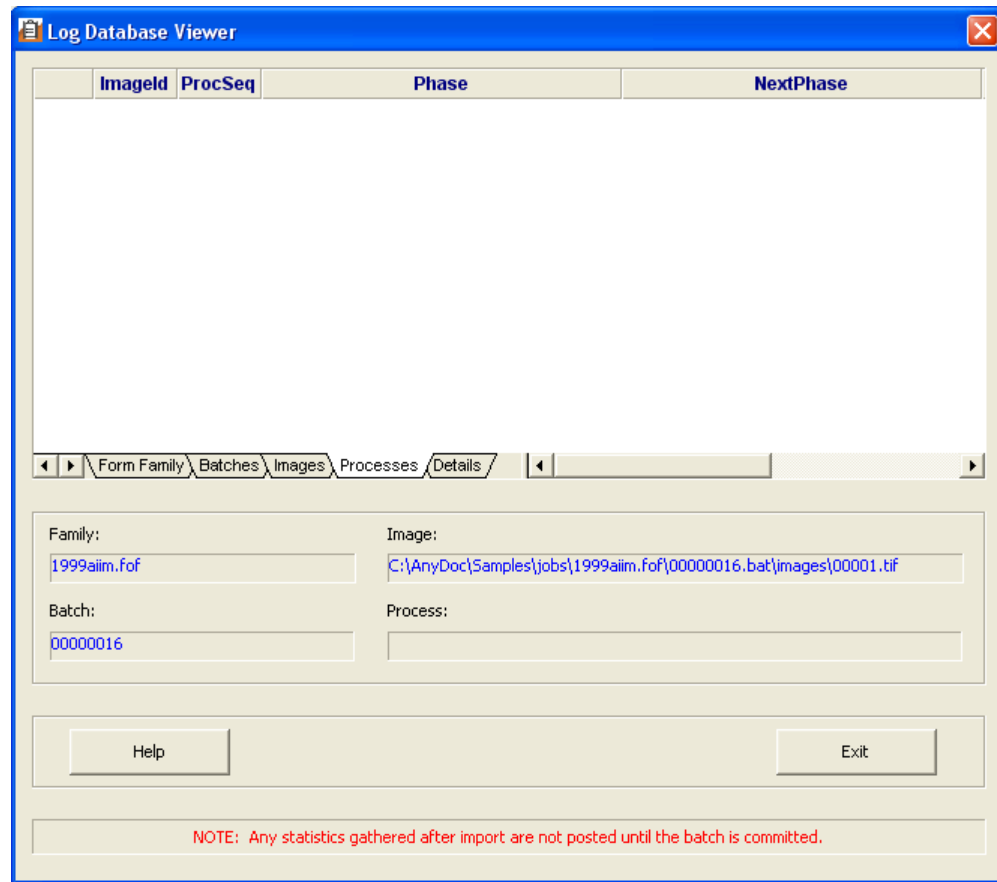


Field	Description
	been rerouted. Otherwise it is zero.
DeleteTime	For deleted images, the date/time the image was deleted.
DeletedBy	The operator who deleted or rerouted the image.
DeletePhase	The phase during which the image was deleted.
DeleteReason	The reason the user gave for deleting or rerouting the image.
RouteFamily	If the image was rerouted, this indicates the form family the image was rerouted to.
RouteBatch	If the image was rerouted, this indicates the batch the image was rerouted to.
RoutePhase	If the image was rerouted, this indicates the phase the image was rerouted from.
SourceSequence	For a image created by rerouting images from another batch, this indicates the original image sequence number from the source batch.

## Log Database and System Maintenance

## Log Database Viewer | Processes Tab

In the Processes tab, the Log Database Viewer shows a summary of each processing phase performed on the image selected in the Images tab.



To view the actual image in the Image Viewer, click the **View Image** button.

The columns appearing in the Processes tab are:

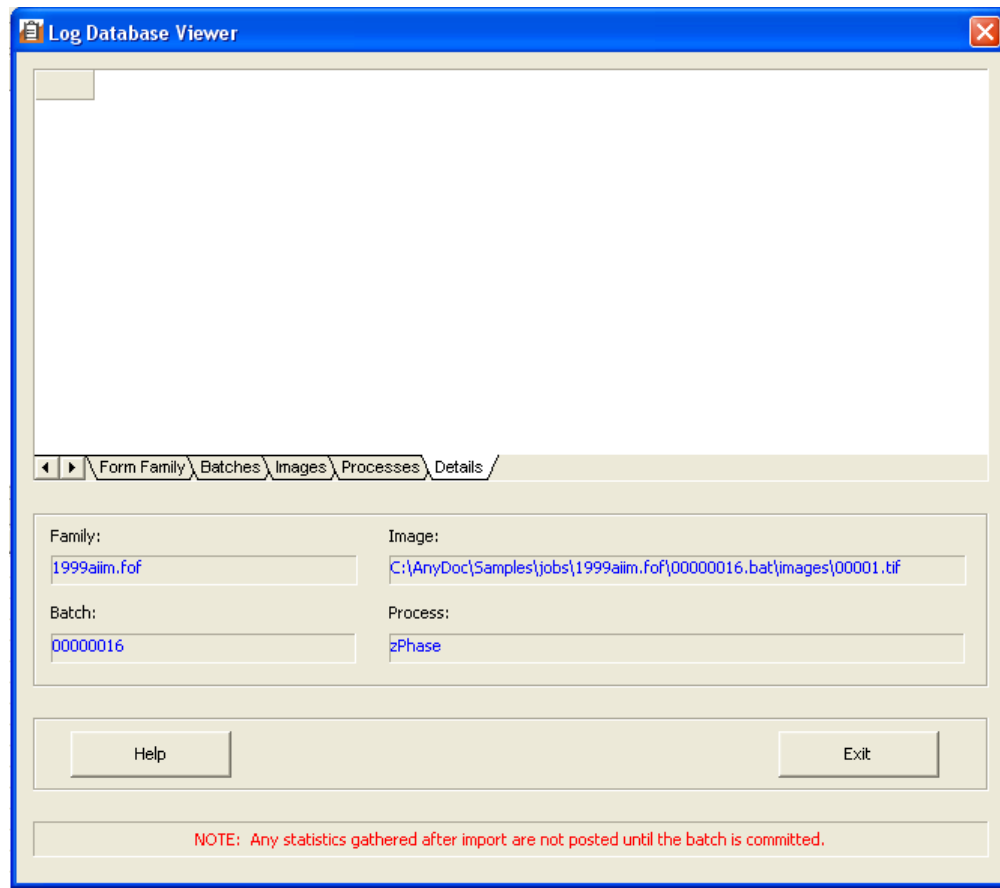
Field	Description
ImageID	A foreign key to the Image table. The unique ImageId of the image on which these processes were performed. This can be used as part of a primary key to find process records associated with an image. Never changed.
ProcSeq	The process sequence number. This number insures that records are sorted in the actual processing sequence. It is used as part of the primary key.
Phase	The processing phase. For example, Classify, Extract, or Verify. The Log Database Viewer displays the phase name. The log database file displays a number that corresponds to the phase.

**Log Database and System Maintenance**

<b>Field</b>	<b>Description</b>
	0 = None 1 = QA 4 = Classify 5 = ID Exception 6 = Extract 7 = High Speed Verify 9 = Verify 10 = Pass2 Verify 11 = Supervisor Verify 15 = Batch Balancing 16 = Commit 17 = Deleted 18 = Routed
	The processing phase the image will be sent to at the end of the current phase. For example, Classify, Extract, or Verify. The Log Database Viewer displays the phase name. The log database file displays a number that corresponds to the following phases: 0 = None 1 = QA 4 = Classify 5 = ID Exception 6 = Extract 7 = High Speed Verify 9 = Verify 10 = Pass2 Verify 11 = Supervisor Verify 15 = Batch Balancing 16 = Commit 17 = Deleted 18 = Routed
NextPhase	
Operator	The operator who processed the image in this phase.
StartTime	The date and time at which the phase started processing the image.
EndTime	The date and time at which the phase finished processing the image.
TotalTime	The total processing time in the phase, in hundredths of a second (.01 seconds).
ComputerId	The name of the computer that processed the image in this phase.

## Log Database Viewer | Details Tab

In the Details tab, the Log Database Viewer shows the details of the processing phase selected in the Phases tab.



The columns appearing in the Details tab depend on which processing phase is selected. The columns for the processing phases are:

### Classification

Field	Description
ImageID	The unique ImageId of the image on which the process was performed. This can be used as part of a primary key to find process records associated with an image.
ProcSeq	The process sequence number. This number is used as part of the primary key.
IDType	The method used to classify the image. For example, Auto ID, ID Default, or ID Attachment. The XIDType table provides the translation of these numbers into text descriptions.

Field	Description
Attempts	The number of attempts needed to classify the image.
Literal	The literal used to classify the image, if applicable.
Template	The template to which the image was classified, if successful.

## Extraction

Field	Description
ImageId	The unique ImageId of the image on which the process was performed.
ProcSeq	The system assigned process sequence number.
BypassVerify	One if the image bypassed Verification, otherwise, zero.
TotalChars	The total number of characters extracted from the image.
TotalQuestionable	The total number of questionable characters extracted from the image.
RegStat	Whether or not the image passed registration. The Log Database Viewer displays the value. The log database file displays a number that corresponds to the value.  0 = Registered 1 = Not Registered 2 = Cannot Register
Rotation	The number of degrees the image was rotated during registration.
XScale	The horizontal image size as a percent of the template size.
YScale	The vertical image size as a percent of the template size.
XTranslate	The number of pixels the image was shifted horizontally to match the template during registration.
YTranslate	The number of pixels the image was shifted vertically to match the template during registration.
RegPt1, RegPt2 ... RegPt6	These fields list the Registration points found and the order in which they were found. The value is one if it was found, zero if it was not found.
Enhancement	If image enhancement was used, shows the level.
TotalNotes	The number of supervisor Sticky Notes attached to the image.

VerificationField	Description
ImageID	The unique ImageId of the image on which the process was performed. This can be used as part of a primary key to find process records associated with an image.
ProcSeq	The process sequence number. This number is used as part of the primary key.

**Log Database and System Maintenance**

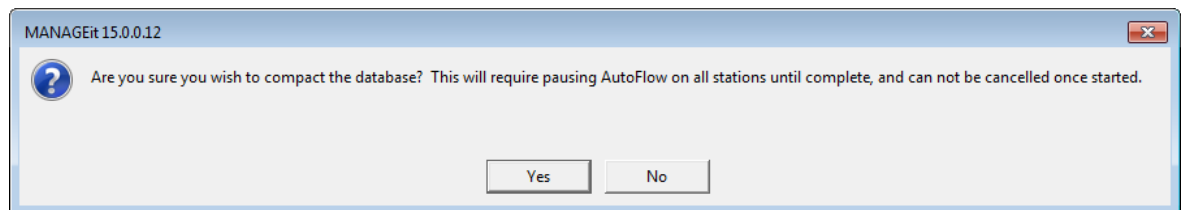
Field	Description
TotalChars	The total number of characters presented to the Verifier. This only includes what actually appears in Verification. For example, hidden zones are not included.
TotalQuestionable	The total number of questionable characters presented to the Verifier. This only includes what actually appears in Verification. For example, hidden zones are not included.
Keystrokes	The number of keystrokes made by Verification operators on the image.
Corrected	The number of questionable characters corrected during Verification.
Other	The number of characters changed during Verification that were not questionable.
DbKeys	The number of keystrokes during double-key Verification, after the first entry.
DbRows	The number of rows (Verification lines) submitted for double-key Verification.
Notes	The number of supervisor sticky notes attached to the image.

## Compact and Repair the Log Database

The Compact and Repair Database feature is only available when OCR for AnyDoc is using the Schema for an Access database.

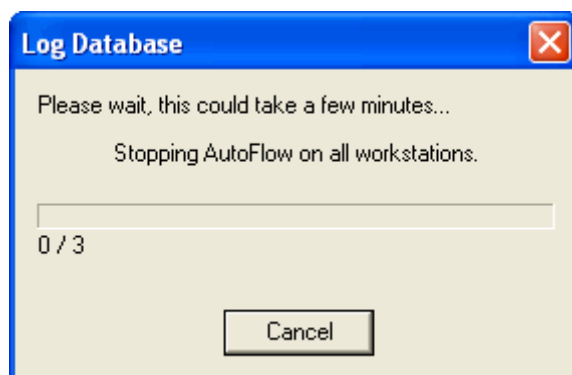
### Steps

- 1 Select **Settings | Databases | Compact and Repair Database (Access Only)**. A message is displayed to confirm the compacting of the database.

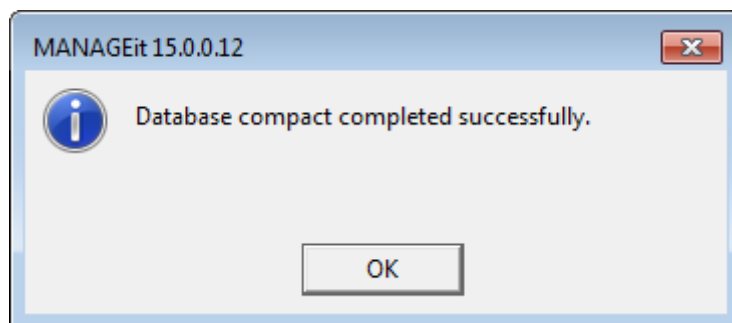


- 2 Click **Yes**.

The **Log Database** window displays the progress of AutoFlow shutting down on the workstations.



After the database has been successfully compacted a confirmation message is displayed.



- 3 Click **OK**.

## Purge the Log Database

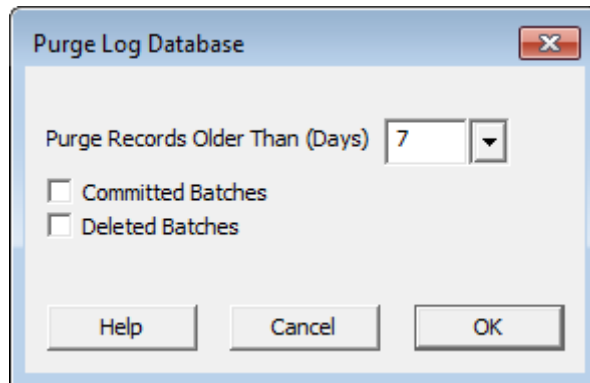
It is recommended that you purge the log database periodically.

### Steps

- 1 Select **Settings | Databases | Purge Log Database**.

**Log Database and System Maintenance**

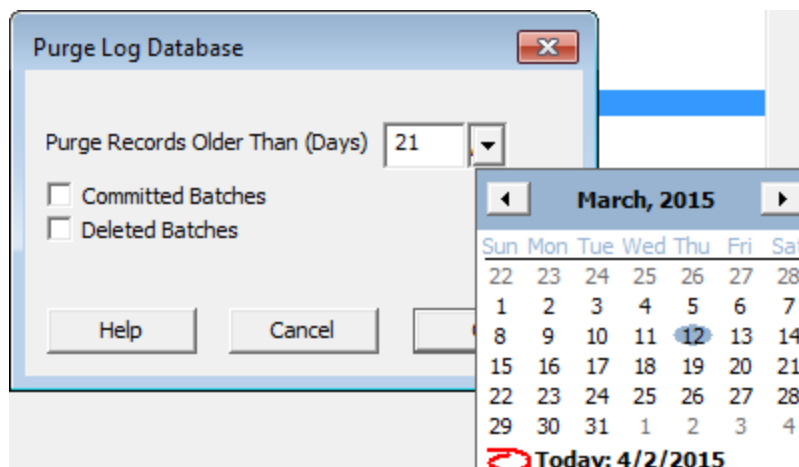
The **Log Database Purge Criteria** window is displayed.



- 2 In the **Purge Records Older Than** \_\_\_\_ **Days** field, enter the number of days of data to retain in the database

OR

Click the arrow to the right of the field to select the date from a calendar. Data older than this date is purged.



- 3 Enable the **Completed Batches** check box to purge information for committed batches older than the specified number of days.
- 4 Enable the **Deleted Batches** check box to purge information for deleted batches older than the specified number of days.
- 5 Click **OK** to purge the log database. The following series of messages is displayed:
  - A message asking you to confirm the purge.
  - A message tracking the progress of the purge.



## Purge the Audit Database

Purging the Audit database periodically is recommended. For more information, see automating this task, see [Schedule an Audit Database Purge](#) (page [227](#)).

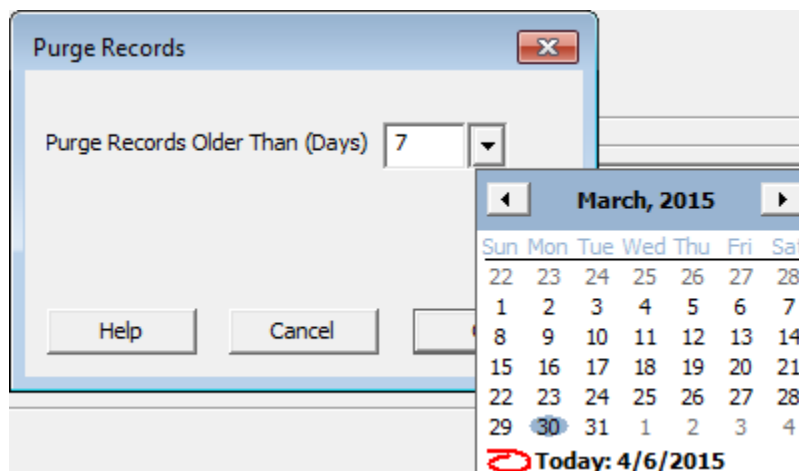
### Steps

- 1 Select **Settings | Databases | Purge Audit Database**.

The **Purge Records** window is displayed.



- 2 In the **Purge Records Older Than (Days)** field, either enter the maximum number of days to keep, or click the down arrow to select the date from a calendar. Data older than this date is purged.



- 3 Click **OK**.

A message is displayed tracking the progress of the purge and informing you when it has finished.

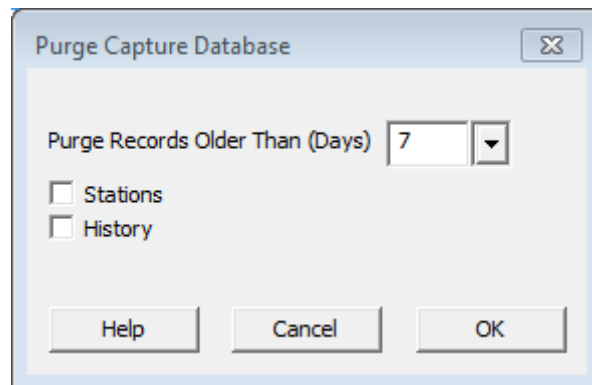
## Purge CAPTUREit Server Database

The batch history and station information for inactive stations on or before the specified date can be purged. You can purge the batch history, station history, or both.

### Steps

- 1 From the **Settings** menu, click **Databases** | **Purge CAPTUREit Server Database**.

The **Purge CAPTUREit Server Database** window is displayed.



- 2 In the **Purge Records Older Than (Days)** field, select the date that determines which records will be deleted.
- 3 Select one or both of the history items to be deleted. Options include:
  - **Stations**  
The history information for all inactive stations will be deleted.
  - **History**  
The history information for the inactive batches will be deleted.
- 4 Click **OK**.

# Chapter 9

## Predefined Crystal Reports

MANAGEit includes everything you need to view Crystal Reports® including predefined starter reports. You can also create your own reports and run them from MANAGEit. You must have Crystal Reports from Business Objects to create reports other than the starter reports provided. For more information on creating reports other than the starter reports, see your Crystal Reports user guide.

Currently, one Log Database report and one Audit database report are provided. The Log Database and Audit Database reports use icons predefined by Crystal Reports 2013.

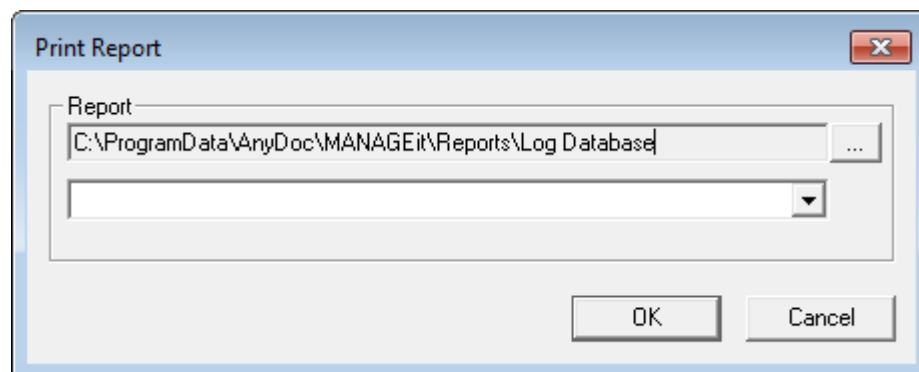
### Run Log Database Reports

#### Steps

- 1 From the **View** menu, click **Log Database | Report**  
OR

Click the **Print Report** button, .

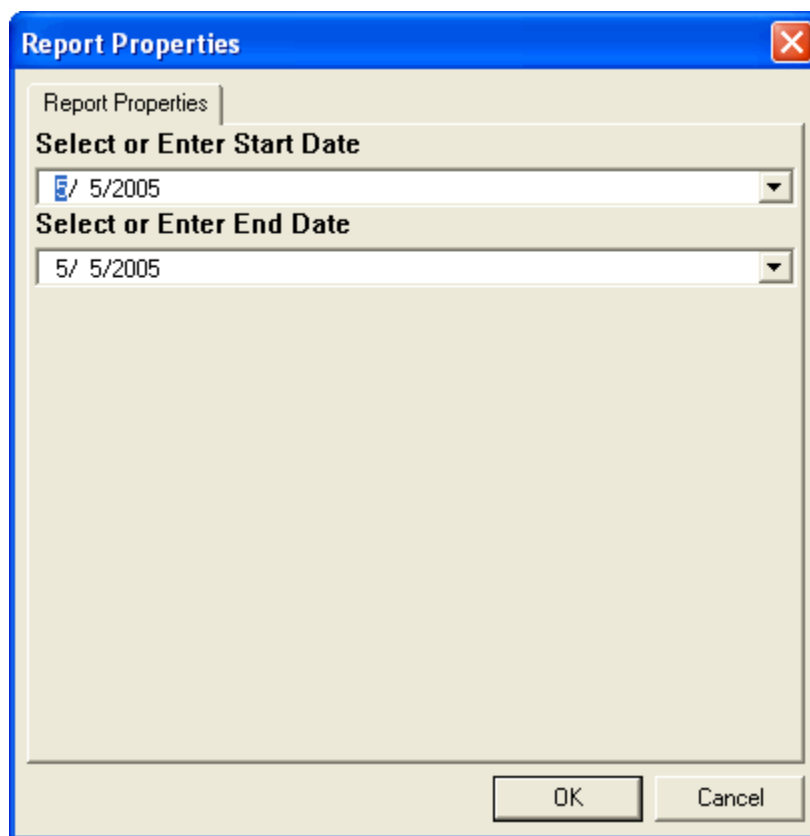
The **Print Report** window is displayed.



- 2 Enter the location where your reports are stored, or browse to that location. The default location is C:\Program Files\Hyland\MANAGEit\Report\Log Database (32-bit environment) or C:\Program Files (x86)\Hyland\MANAGEit\Report\Log Database (64-bit environment).
- 3 Select a report from the drop-down list.

## Predefined Crystal Reports

The **Report Properties** window is displayed. The information displayed on this window will vary depending on the information included in your reports.



- 4 Type the date range for the report in the **Select or Enter Start Date** and **Select or Enter End Date** fields or click the arrow to select the date from a calendar.
- 5 Click **OK**.  
The selected report is displayed.

## Run the Audit Database Report

### Steps

- 1 Select **View | Audit Database Report**
- 2 The **Print Report** window is displayed. Select a report from the drop down list. Click **OK**.

# Chapter 10

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## Task Scheduler

MANAGEit provides a task scheduler for scheduling jobs to be performed routinely and automatically. This task scheduler is based on the Microsoft Windows Task Scheduler and requires that the Windows task scheduler service be enabled and running on the MANAGEit station.

The MANAGEit task scheduler allows you to schedule actions such as printing reports, backing up the log database, purging the log and audit databases and purging old batch history logs. Each scheduled task can contain multiple actions to carry out one after the other. For example, you could schedule one task to convert two log database reports to PDF files and send the files by e-mail to one or more recipients.

Using the task scheduler, you can do the following:

- Schedule new tasks (page [123](#))
- Edit existing tasks
- Delete scheduled tasks (page [244](#))

If you are upgrading to MANAGEit 15 from a previous version, you can use the Convert Tasks option to convert scheduled tasks created in an earlier version of MANAGEit so you can use them in version 15. See Convert Tasks from a Previous Version (page [244](#)).

### Schedule New Tasks


You can use the Task Scheduler to perform routine tasks automatically. The task scheduler provides a task wizard to simplify the scheduling of the following tasks:

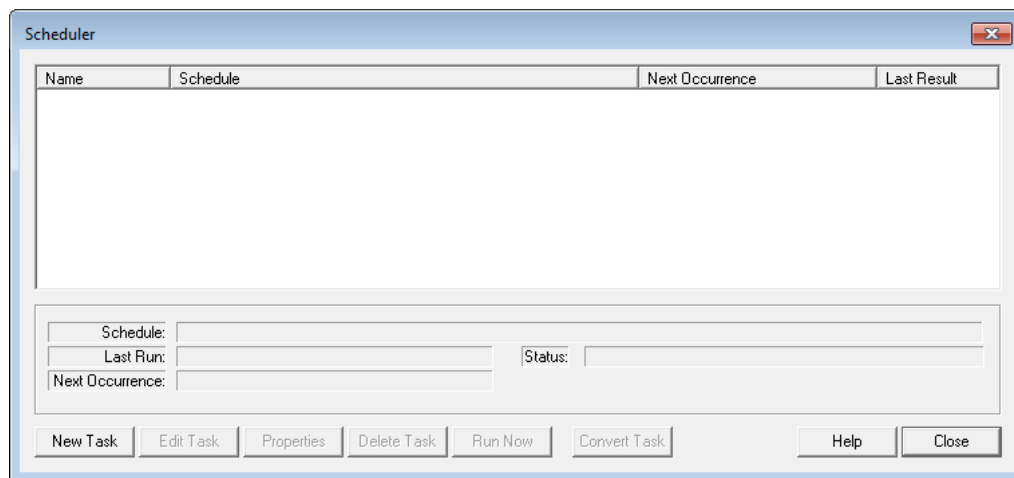
- Purge the CAPTUREit Server Database (page [124](#))
- Back up the Log Database (page [137](#))
- Purge the Log Database (page [161](#))
- Pause Autoflow Processing (page [175](#))
- Schedule Log Database Reports (page [188](#))
- Schedule E-mail Reports (page [202](#))
- Schedule Audit Database Reports (page [215](#))
- Purge the Audit Database (page [227](#))

## Purge the CAPTUREit Server Database

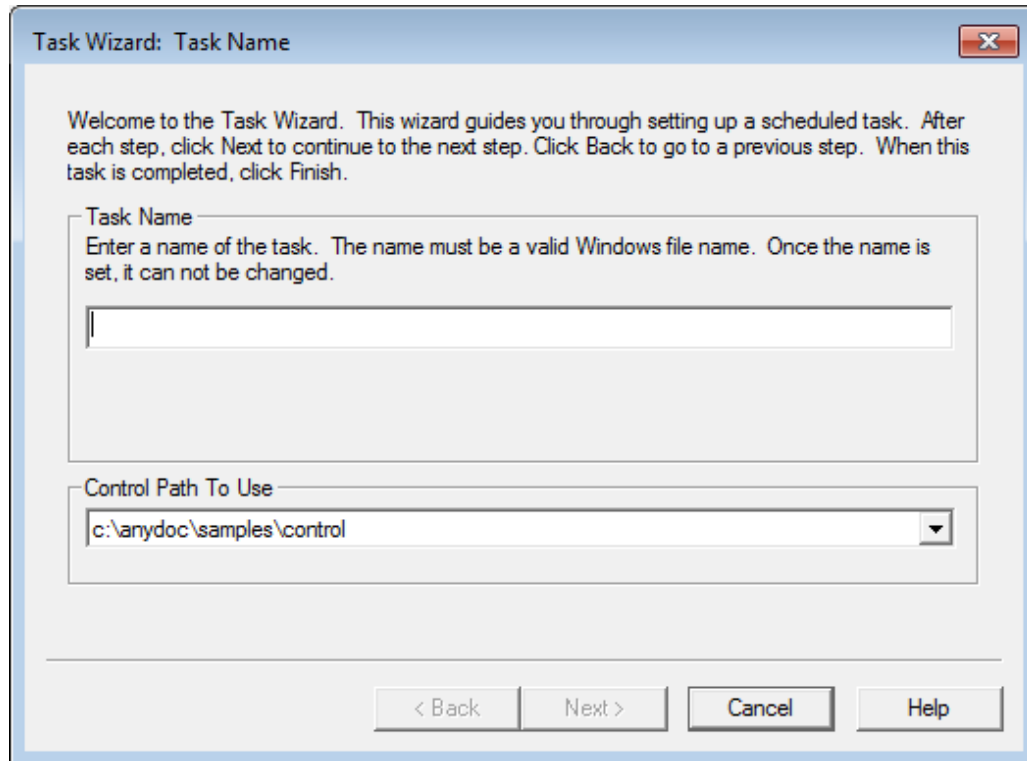
The batch history and station information for inactive stations on or before the specified date can be purged. You can purge the batch history, station history, or both.

### Steps

- 1 Open the MANAGEit Task Scheduler by performing one of the following steps:
  - Select **Settings | MANAGEit Task Scheduler**.
  - Click the **MANAGEit Task Scheduler** button . The **Scheduler** window is displayed.



- 2 Click **New Task**. The **Task Wizard: Task Name** window is displayed.

The image shows a Windows-style dialog box titled "Task Wizard: Task Name". It has a standard title bar with a close button (X). The main area contains a welcome message: "Welcome to the Task Wizard. This wizard guides you through setting up a scheduled task. After each step, click Next to continue to the next step. Click Back to go to a previous step. When this task is completed, click Finish." Below this, there are two sections. The first is labeled "Task Name" and contains a text box with the instruction: "Enter a name of the task. The name must be a valid Windows file name. Once the name is set, it can not be changed." The second section is labeled "Control Path To Use" and contains a dropdown menu with the text "c:\anydoc\samples\control". At the bottom of the dialog, there are four buttons: "< Back", "Next >", "Cancel", and "Help".

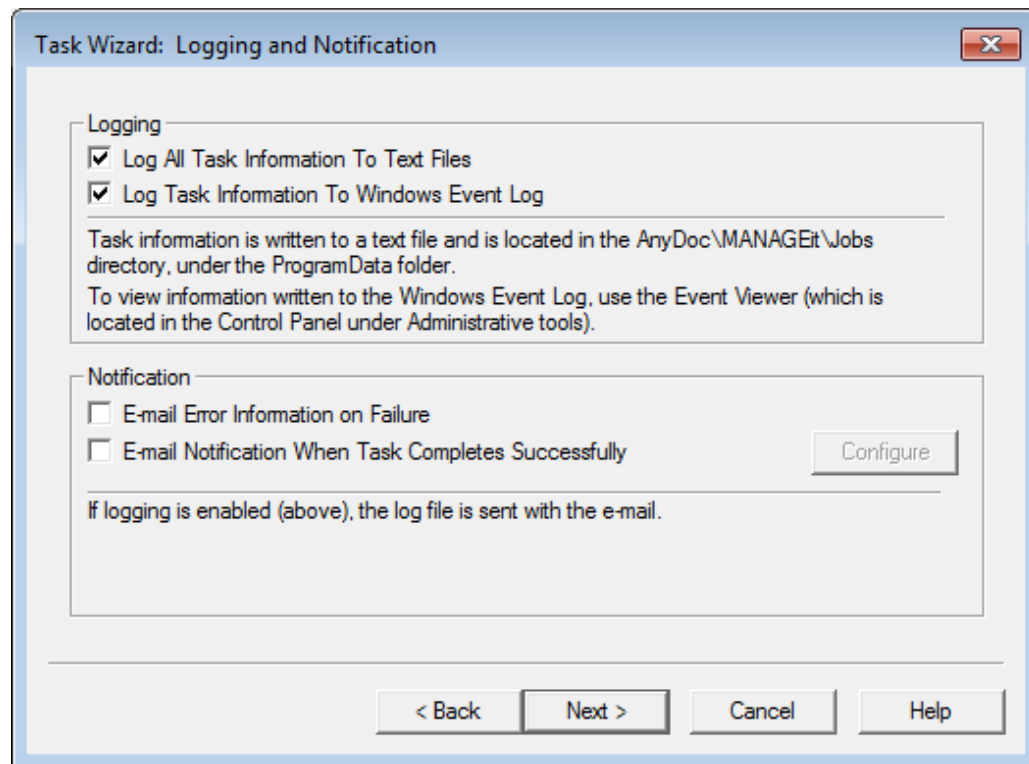
- 3 In the **Task Name** field, enter a name for the new task. This name must be a valid DOS long file name. After you enter a task name and go to the next page, the name cannot be changed. If you enter an invalid character, it appears in red and the station beeps as a warning.
- 4 Select a **Control Path To Use**. All control paths currently being monitored are listed.



Each task only applies to one control path. If multiple control paths are being monitored, you must schedule separate tasks for each control path.

**Task Scheduler**

- 5 Click **Next**. The **Task Wizard: Logging and Notification** window is displayed.



- 6 Select the **Log All Task Information To Text Files** check box to create text files with a trace of all steps taken by a task while performing its assigned actions. The log files are created in C:\ProgramData\AnyDoc\MANAGEit\Jobs and have the same name as the scheduled task.
- 7 Select the **Log Task Information To Windows Event Log** check box to create a record of a task's start and end in the Windows Event Log. Any errors occurring during processing are also recorded in the Windows Event Log. The Event Log is available from **Start | Control Panel | Administrative Tools | Event Viewer**. The Event Viewer allows you to see the start and end of MANAGEit tasks from other stations.
- 8 In the **Notification** area, select e-mail notification for one or both of the following:

- **E-Mail Error Information on Failure**
- **E-Mail Notification When Task Completes Successfully**

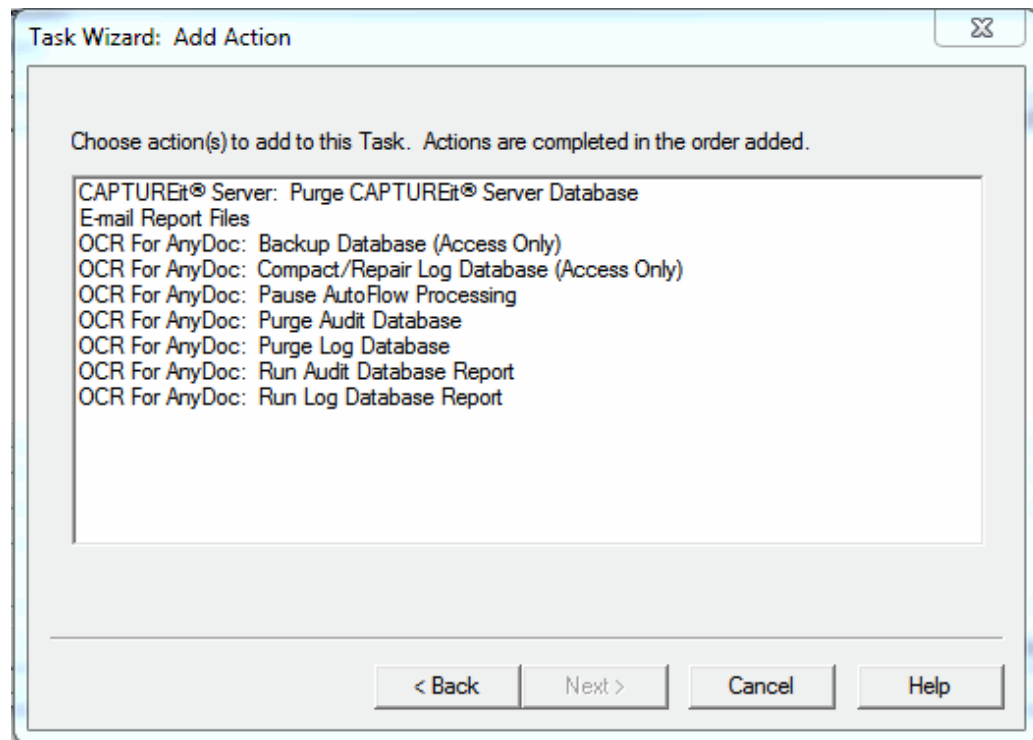
Selecting either of these e-mail notifications activates the **Configure** button. Click **Configure** to specify e-mail recipients. See E-mail Alert Notifications (page 97).



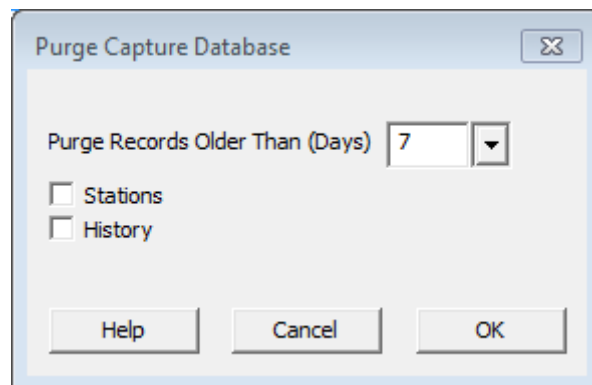
If either of the options in the Logging area are selected, the log file is sent with the e-mail notification.



- 9 Click **Next**. The **Task Wizard: Add Action** window is displayed.



- 10 Select **Purge CAPTUREit Server Database** and click **Next**.  
The **Purge CAPTUREit Server Database** window is displayed.

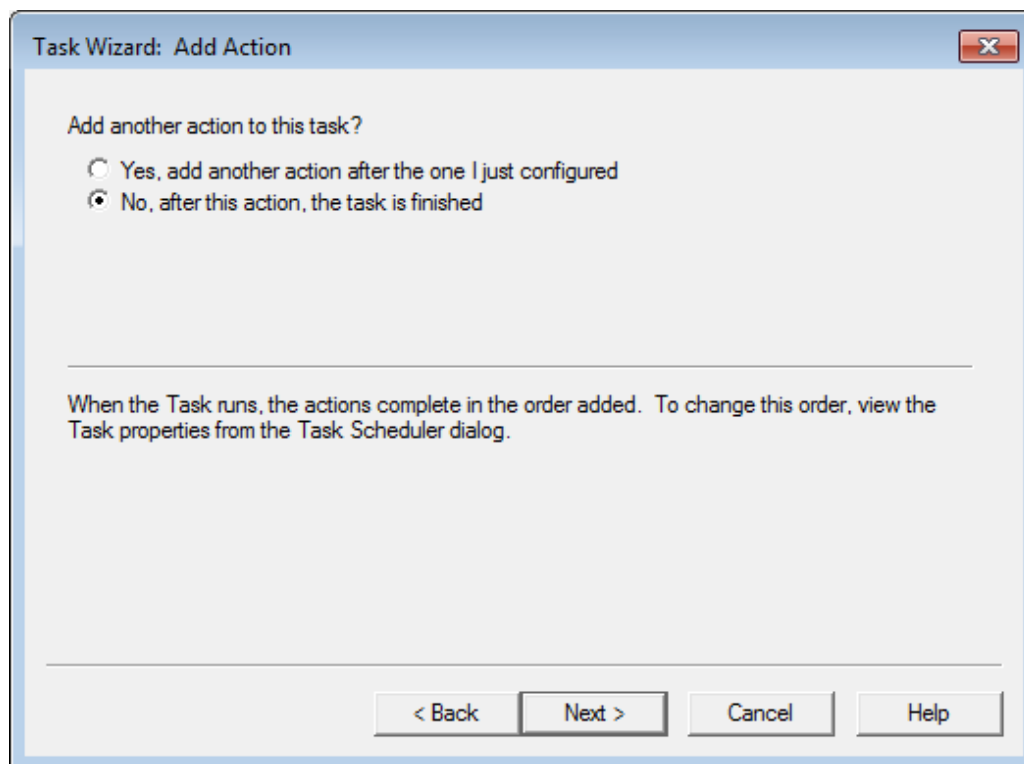


- 11 In the **Purge All Records on or Before** field, select the date that determines which records will be deleted.
- 12 Select one or both of the history items to be deleted. Options include:
- **Purge Batch History**  
The history information for the inactive batches will be deleted.
  - **Purge Station History**  
The history information for all inactive stations will be deleted.

**Task Scheduler**

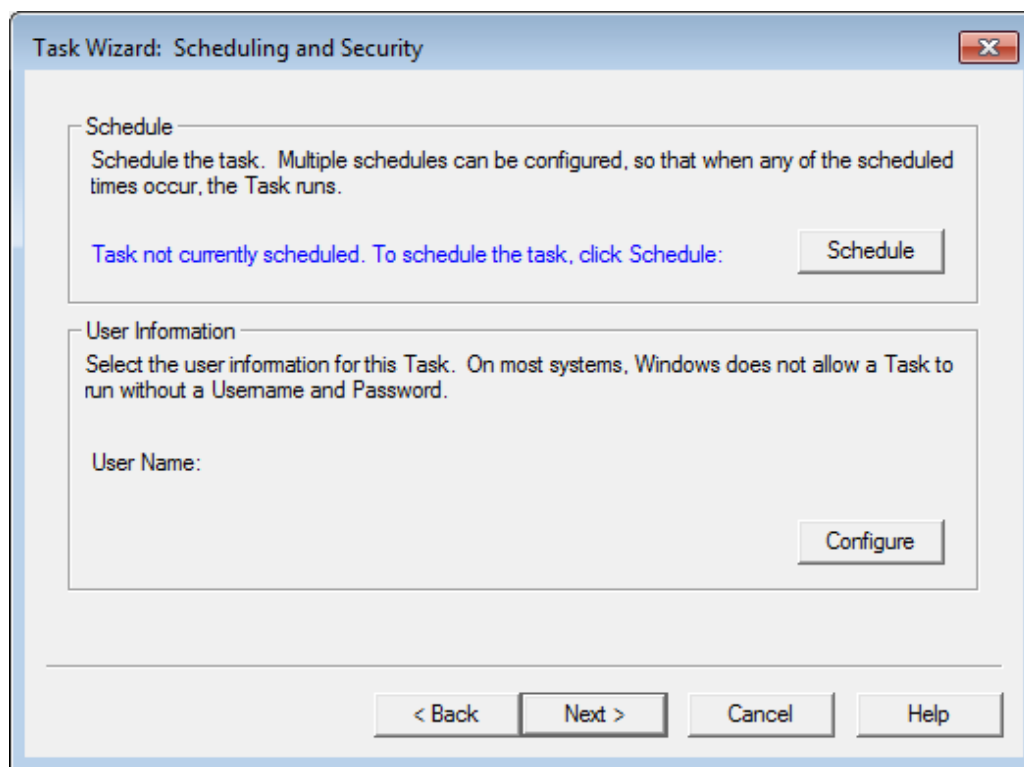
- 13** Click **OK**.

The **Task Wizard: Add Action** window is displayed.



- 14** Select **Yes** to add another action to the same task. Repeat previous steps until all actions have been added  
OR  
Select **No** if you have finished adding actions.
- 15** Click **Next** to schedule the task and set appropriate security.

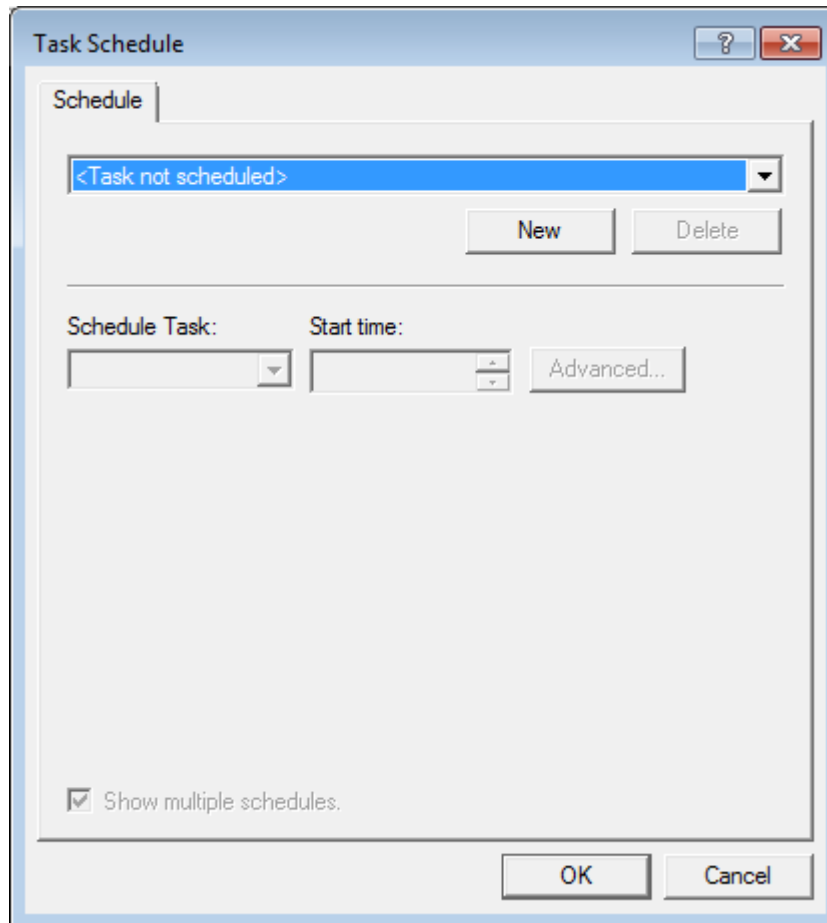
The **Task Wizard: Scheduling and Security** window is displayed.



**16** Click **Schedule**.

**Task Scheduler**

The **Task Schedule** window is displayed.



- 17 Click **New** to create a schedule for this task.

You can create multiple schedules for a single task. The **Schedule** tab reflects the new schedule that you are creating. Click the arrow for a list of schedules that have already been created for this task. This field only appears if **Show multiple schedules** is selected.

- 18 Select an option from the **Schedule Task** menu to select how frequently the task is performed.



It is strongly recommended that you do not schedule tasks to run At System Startup, At Logon, or When idle. These schedule items require user intervention.

- 19 If **Daily**, **Weekly**, **Monthly**, or **Once** was selected from the **Schedule Task** menu, enter a **Start Time** for the task. Depending on the option selected from the **Schedule Task** menu the **Schedule Task** section offers different options.

**Schedule Task Daily**

Every  day(s)

Appears when Daily is chosen for the task frequency. Enter the frequency in days.

**Schedule Task Weekly**

Every  week(s) on:

<input checked="" type="checkbox"/> Mon	<input type="checkbox"/> Sat
<input type="checkbox"/> Tue	<input type="checkbox"/> Sun
<input type="checkbox"/> Wed	
<input type="checkbox"/> Thu	
<input type="checkbox"/> Fri	

Appears when Weekly is selected for the task frequency. Enter the frequency in weeks and select the day(s) of the week to run the task.

**Schedule Task Monthly**

☒ Day  of the month(s)

☐ The  of the month(s)

Appears when Monthly is chosen for the task frequency. Select either the Day of the month to run the task, or select The \_\_\_\_ of the month(s) and enter a week and day (e.g., the Third Friday of the month). Click Select Months to select specific month(s) to run the task.

**Schedule Task Once**

Run on:

Appears when Once is selected for the task frequency. Select the date to run the task.

**Schedule Task When Idle**

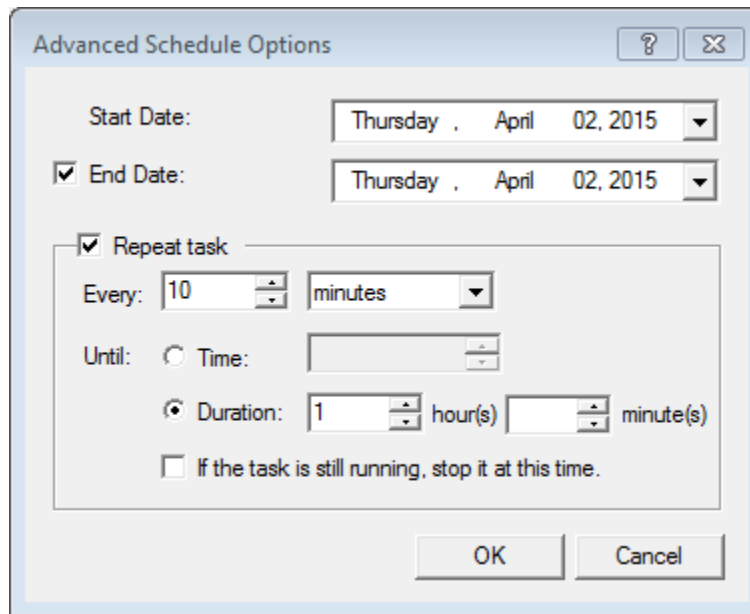
When the computer has been idle for:  minute(s)

Appears when When idle is selected for the task frequency. Enter the number of minutes that the station must be idle before running the task.

- 20** To set up more than one schedule for this task, enable the **Show multiple schedules** check box.

**Task Scheduler**

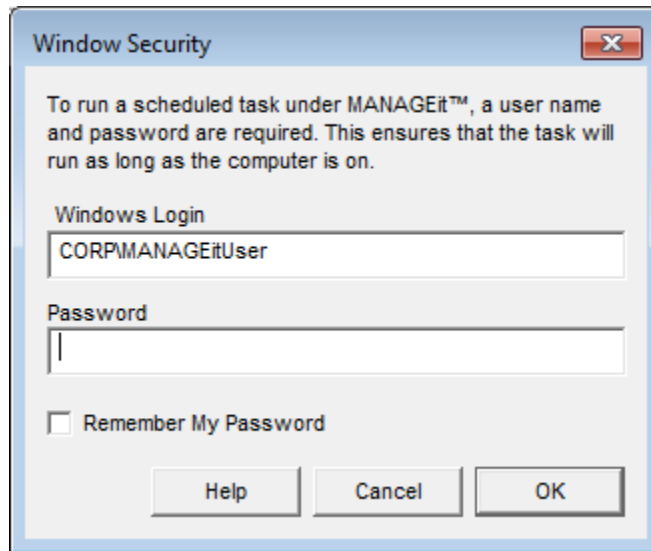
- 21 Click the **Advanced** button to access additional scheduling options.

The image shows a dialog box titled "Advanced Schedule Options". It has a question mark icon and a close icon in the top right corner. The dialog contains the following fields and controls:

- Start Date:** A date picker showing "Thursday , April 02, 2015".
- ☒ **End Date:** A date picker showing "Thursday , April 02, 2015".
- ☒ **Repeat task**: A section containing:
  - Every:** A spinner box set to "10" and a dropdown menu set to "minutes".
  - Until:** Two radio buttons: "Time:" (unselected) and "Duration:" (selected).
  - Duration:** A spinner box set to "1", a dropdown menu set to "hour(s)", and another spinner box set to "0" followed by "minute(s)".
  - ☐ **If the task is still running, stop it at this time.**
- OK** and **Cancel** buttons at the bottom.

- 22 Enter the **Start Date** or use the arrow to select the date from a calendar.
- 23 Select the **End Date** check box and enter the date to stop running the task or use the arrow to select the date from a calendar, if needed.
- 24 Select the **Repeat Task** check box to configure how often to repeat the task. Choose to repeat it every selected number of minutes or hours, until a selected time, or for a selected number of minutes/hours. You can also select to stop the task by selecting the If the task is still running, stop it at this time check box.
- 25 Click **OK** in the Advanced Schedule Options window, then click **OK** in the Task Schedule window. The Task Wizard: Scheduling and Security window reappears.

- 26 Click **Configure** to set a user name and password to run the task(s). The Window Security window appears.



- 27 Enter a user name and password. The user identified must have access to all drives used by OCR for AnyDoc (such as the Control directory).

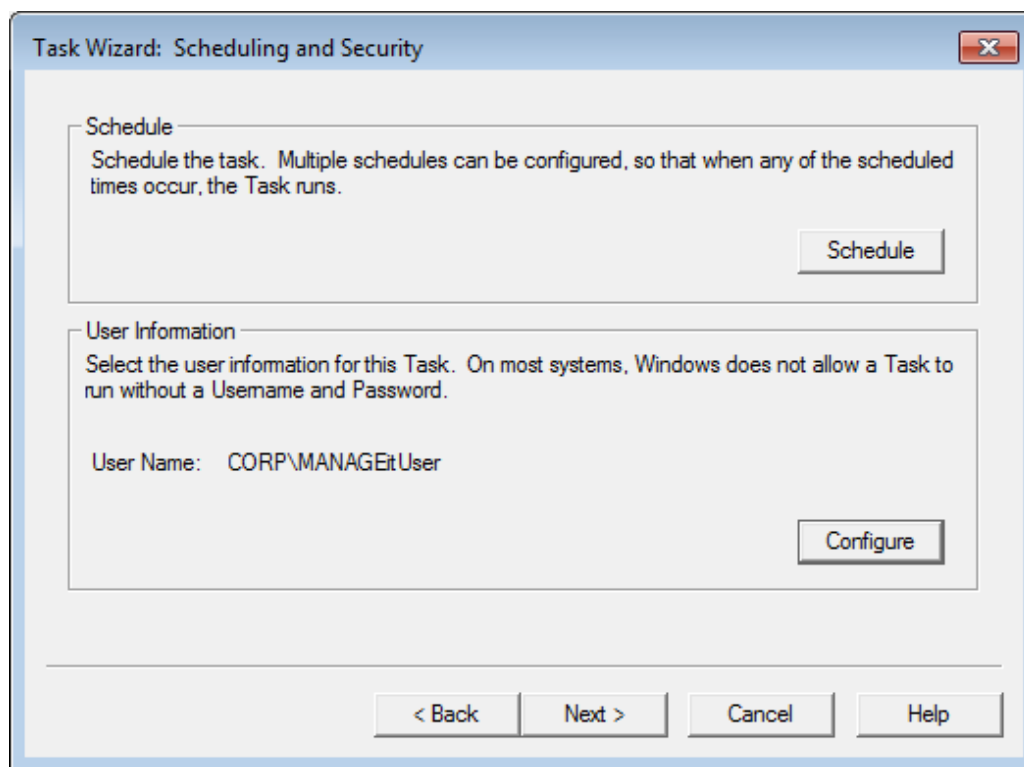


If you are using a networked path and a domain name is required, it must be entered with the user name for the task to run. Check with your System Administrator to determine if your network settings require a domain name.

- 28 Select the **Remember My Password** check box to carry out the task without running MANAGEit. Selecting this check box also avoids being prompted every time you update the task.
- 29 Click **OK** when finished.

**Task Scheduler**

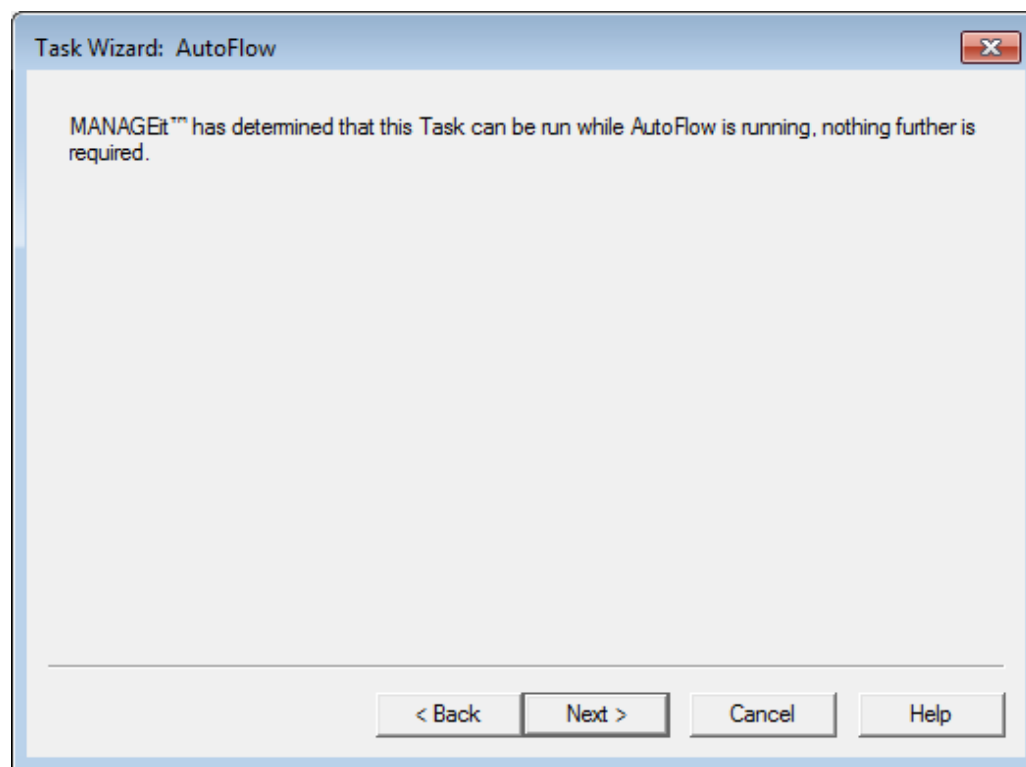
The **Scheduling and Security** window displays the configured user name.



**30** Click **Next**.



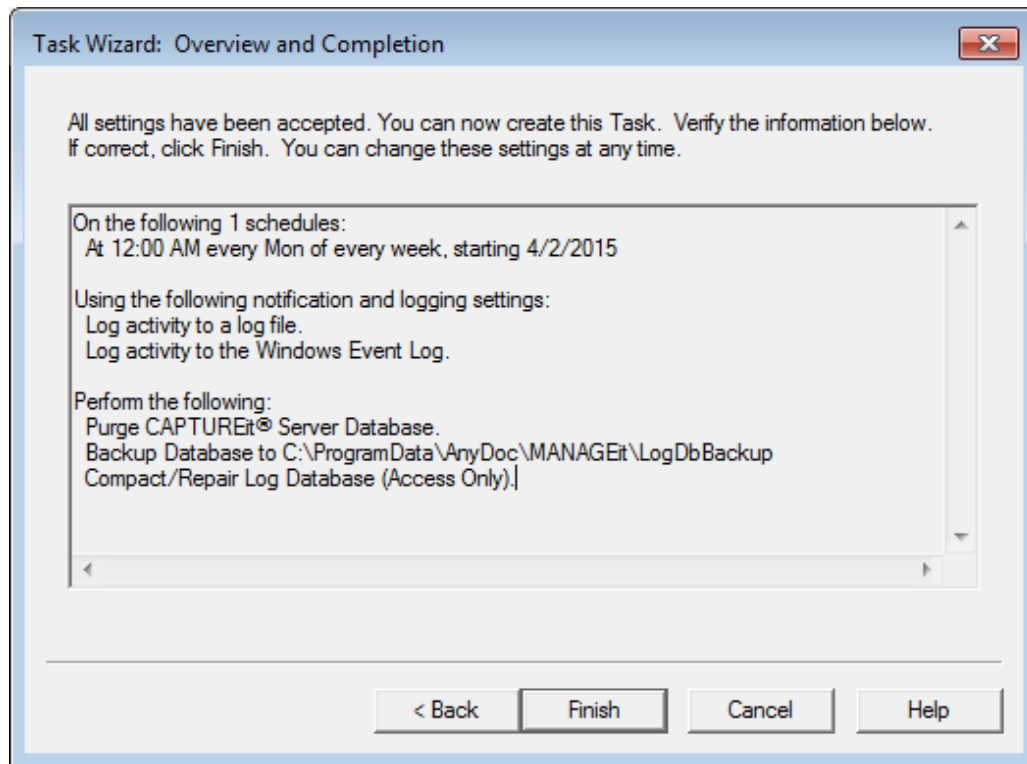
The **Task Wizard: AutoFlow** window is displayed.



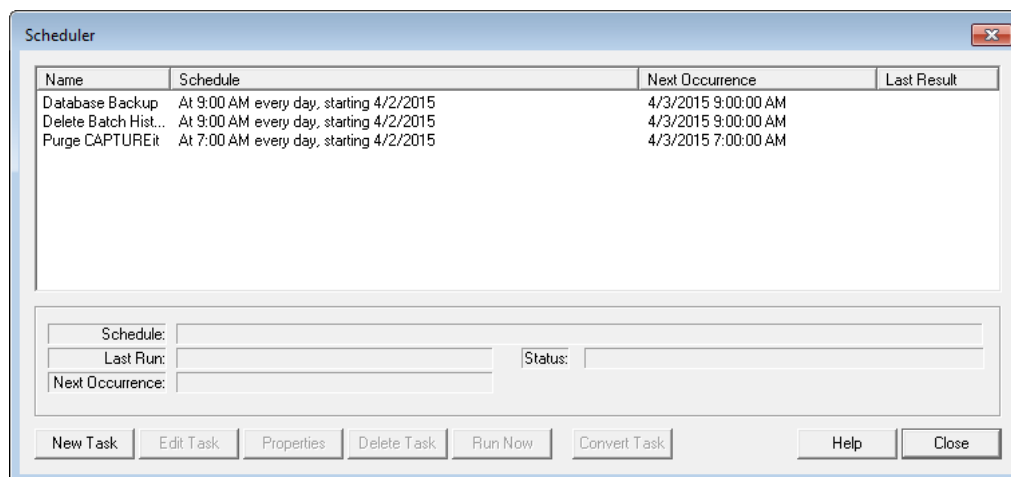
**31** Click **Next**.

## Task Scheduler

The **Task Wizard: Overview and Completion** window displays information concerning the task you have just scheduled.




- 32 Click **Back** to return to edit a selected task or click **Finish** to run the task on the configured schedule. The **Scheduler** window displays the configured tasks.

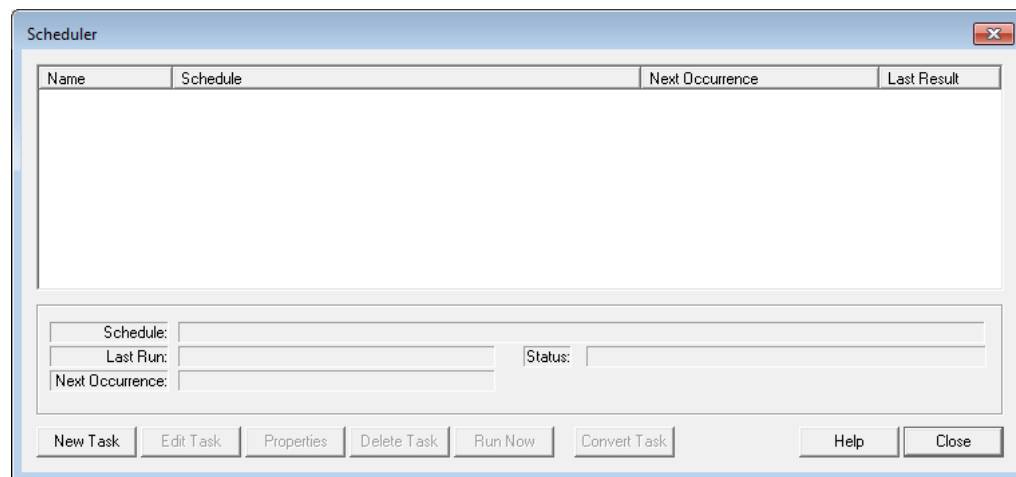


## Backup the Log Database

You can schedule log database backups of the version 4.0 default Access log database or the prior version log database using the MANAGEit Task Scheduler. The procedure for scheduling the log database backup task is the same for either database version. You can not schedule backups of other database types in MANAGEit (e.g., SQL, Oracle, etc.).

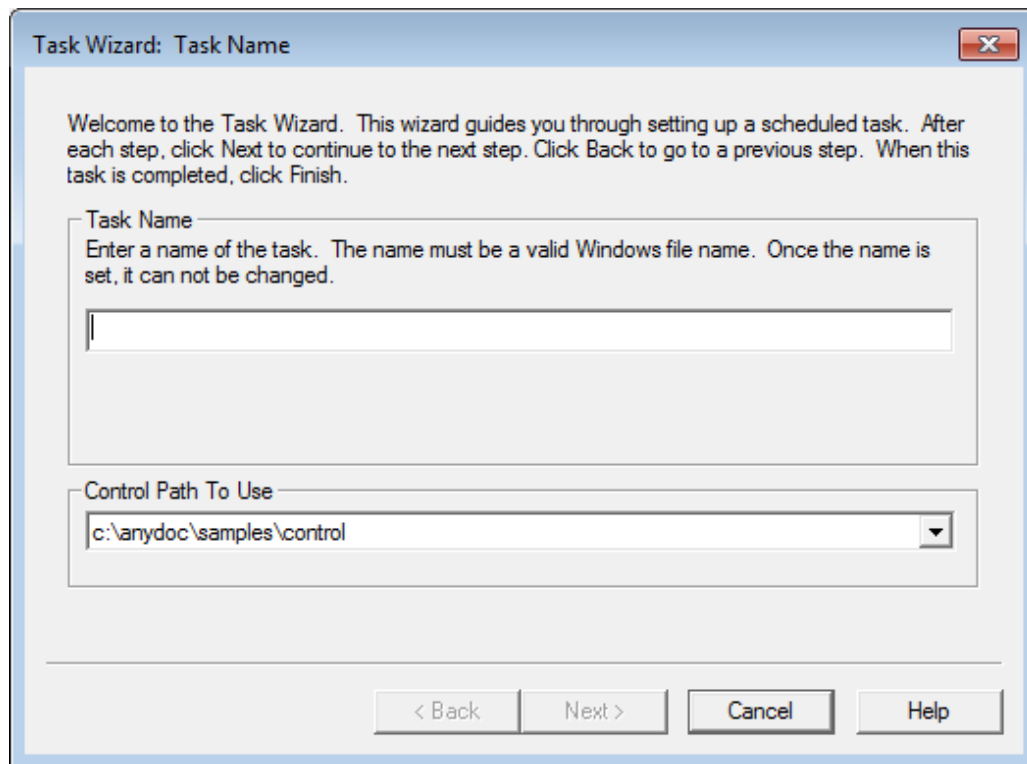
### Steps

- 1 Open the MANAGEit Task Scheduler by performing one of the following steps:
  - Select **Settings | MANAGEit Task Scheduler**.
  - Click the **MANAGEit Task Scheduler** button . The **Scheduler** window is displayed.



**Task Scheduler**

- 2 Click **New Task**. The **Task Wizard: Task Name** window is displayed.



The image shows a Windows-style dialog box titled "Task Wizard: Task Name". It has a standard Windows window frame with a title bar and a close button (X) in the top right corner. The dialog contains the following elements:

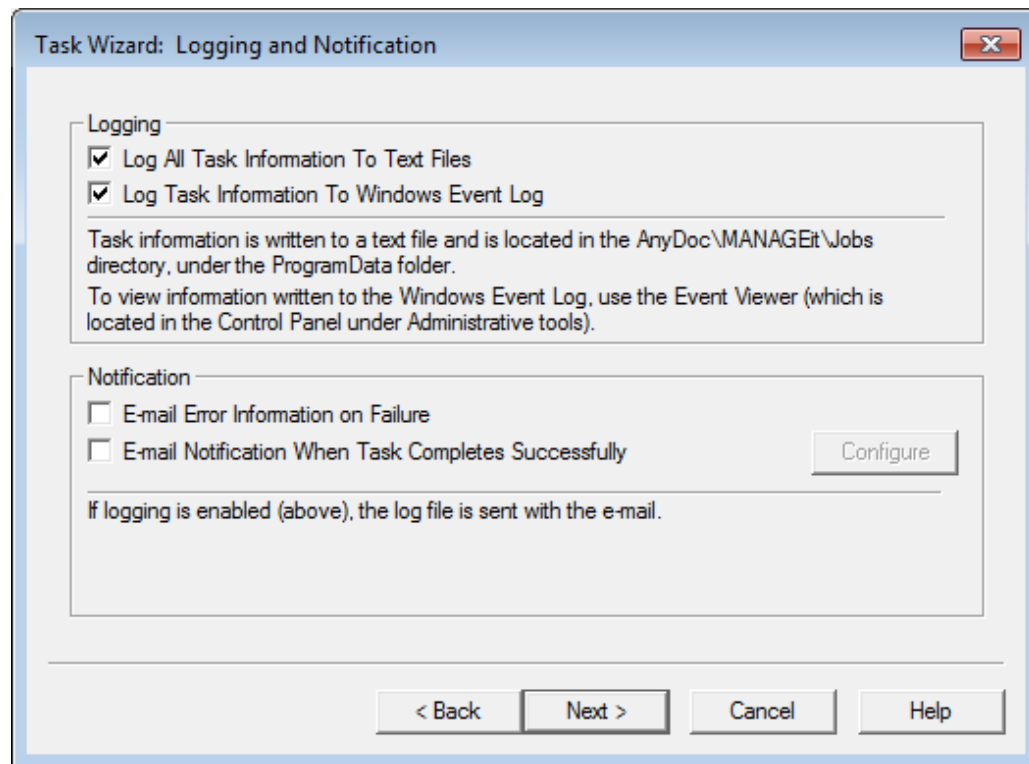
- Task Name**: A section with a label "Task Name" and a text box. Above the text box is a paragraph: "Welcome to the Task Wizard. This wizard guides you through setting up a scheduled task. After each step, click Next to continue to the next step. Click Back to go to a previous step. When this task is completed, click Finish." Below the label is a smaller instruction: "Enter a name of the task. The name must be a valid Windows file name. Once the name is set, it can not be changed." The text box is empty.
- Control Path To Use**: A section with a label "Control Path To Use" and a text box. The text box contains the path "c:\anydoc\samples\control" and has a dropdown arrow on the right side.
- Buttons**: At the bottom of the dialog, there are four buttons: "< Back", "Next >", "Cancel", and "Help".

- 3 In the **Task Name** field, enter a name for the new task. This name must be a valid DOS long file name. After you enter a task name and go to the next page, the name cannot be changed. If you enter an invalid character, it appears in red and the station beeps as a warning.
- 4 Select a **Control Path To Use**. All control paths currently being monitored are listed.



Each task only applies to one control path. If multiple control paths are being monitored, you must schedule separate tasks for each control path.

- 5 Click **Next**. The **Task Wizard: Logging and Notification** window is displayed.



- 6 Select the **Log All Task Information To Text Files** check box to create text files with a trace of all steps taken by a task while performing its assigned actions. The log files are created in C:\ProgramData\AnyDoc\MANAGEit\Jobs and have the same name as the scheduled task.
- 7 Select the **Log Task Information To Windows Event Log** check box to create a record of a task's start and end in the Windows Event Log. Any errors occurring during processing are also recorded in the Windows Event Log. The Event Log is available from **Start | Control Panel | Administrative Tools | Event Viewer**. The Event Viewer allows you to see the start and end of MANAGEit tasks from other stations.
- 8 In the **Notification** area, select e-mail notification for one or both of the following:

- **E-Mail Error Information on Failure**
- **E-Mail Notification When Task Completes Successfully**

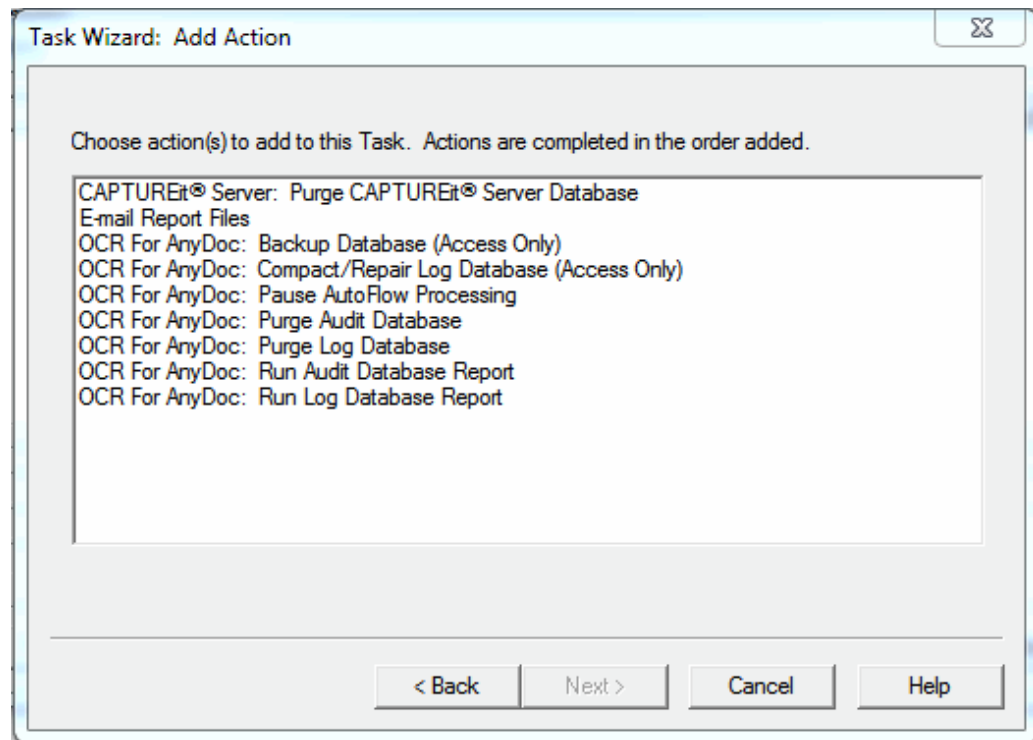
Selecting either of these e-mail notifications activates the **Configure** button. Click **Configure** to specify e-mail recipients. See E-mail Alert Notifications (page 97).



If either of the options in the Logging area are selected, the log file is sent with the e-mail notification.

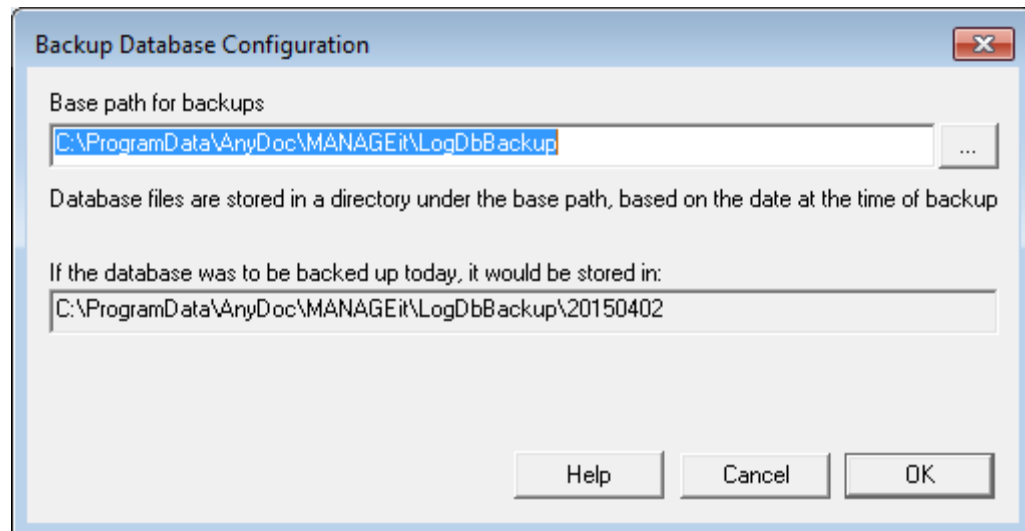
**Task Scheduler**

- 9 Click **Next**. The **Task Wizard: Add Action** window is displayed.




- 10 Select **Backup Database** and click **Next**.

The **Backup Database Configuration** window is displayed.

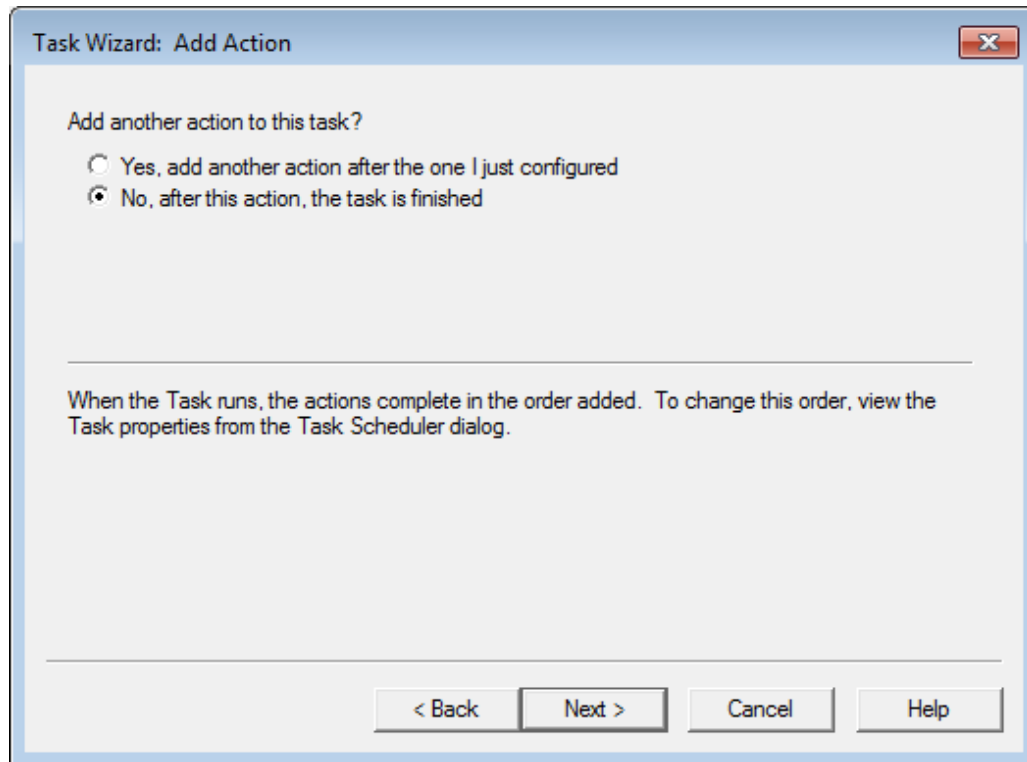


- 11 Enter a base path for the backup copies  
OR

Click  to browse to the location. When the backup is run, MANAGEit takes this base path and appends a subdirectory based on the current date to it. The default base path is C:\ProgramData\AnyDoc\MANAGEit\LogDbBackup.

**12** Click **OK**.

The **Task Wizard: Add Action** window is displayed.



**13** Select **Yes** to add another action to the same task. Repeat previous steps until all actions have been added

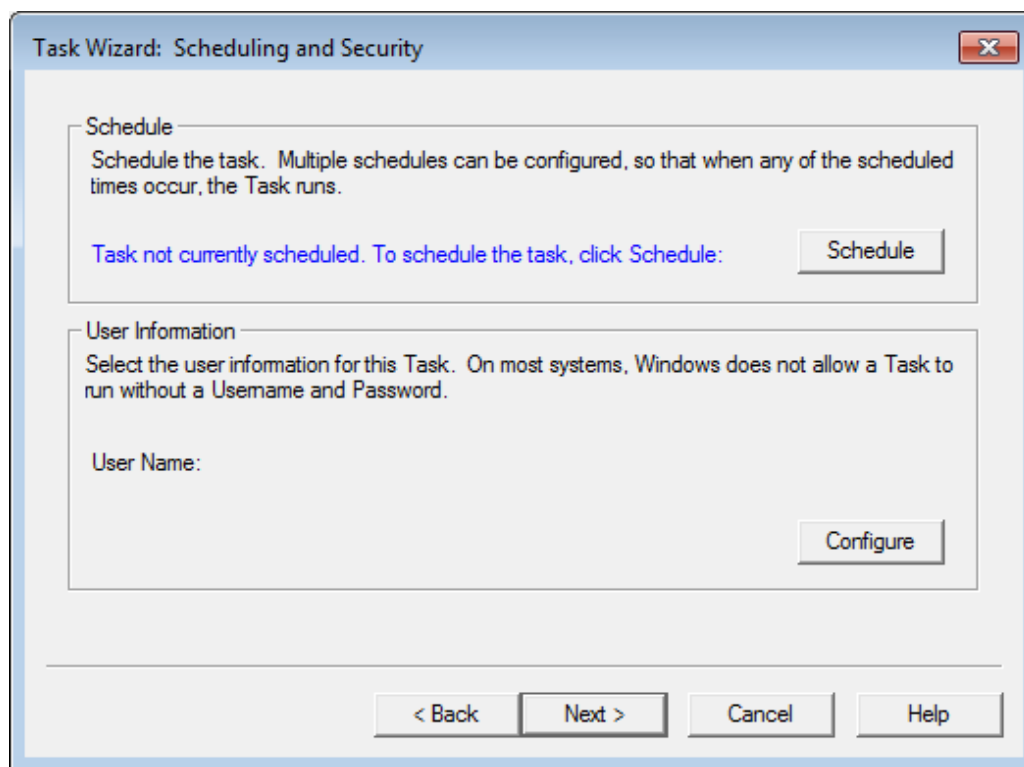
OR

Select **No** if you have finished adding actions.

**14** Click **Next** to schedule the task and set appropriate security.

**Task Scheduler**

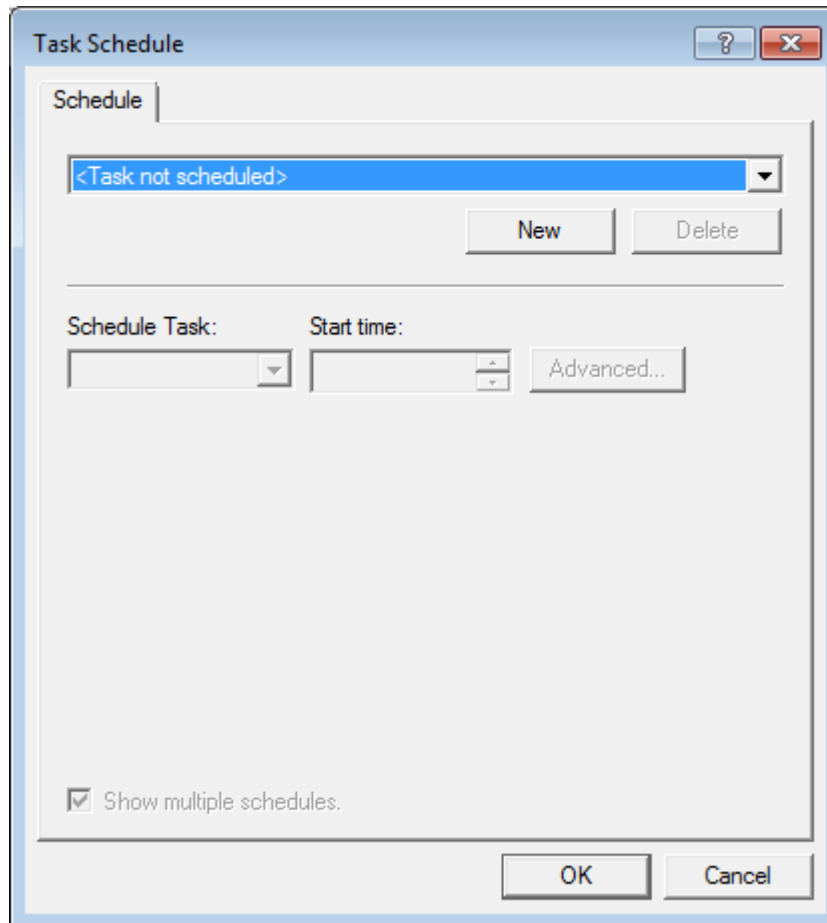
The **Task Wizard: Scheduling and Security** window is displayed.



**15** Click **Schedule**.



The **Task Schedule** window is displayed.



- 16 Click **New** to create a schedule for this task.

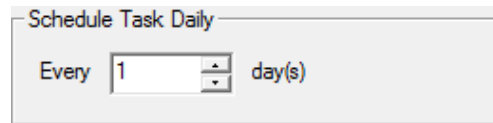
You can create multiple schedules for a single task. The **Schedule** tab reflects the new schedule that you are creating. Click the arrow for a list of schedules that have already been created for this task. This field only appears if **Show multiple schedules** is selected.

- 17 Select an option from the **Schedule Task** menu to select how frequently the task is performed.



It is strongly recommended that you do not schedule tasks to run At System Startup, At Logon, or When idle. These schedule items require user intervention.

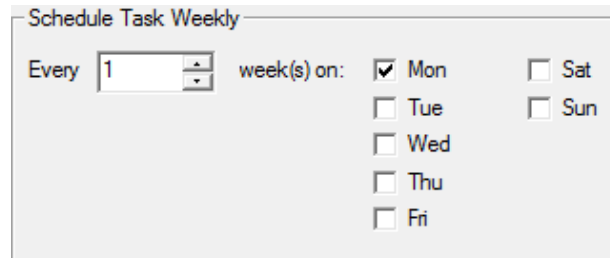
- 18 If **Daily**, **Weekly**, **Monthly**, or **Once** was selected from the **Schedule Task** menu, enter a **Start Time** for the task. Depending on the option selected from the **Schedule Task** menu the **Schedule Task** section offers different options.

**Task Scheduler**


Schedule Task Daily

Every  day(s)

Appears when Daily is chosen for the task frequency. Enter the frequency in days.

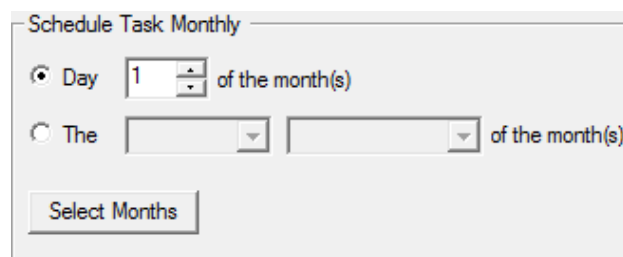


Schedule Task Weekly

Every  week(s) on:

<input checked="" type="checkbox"/> Mon	<input type="checkbox"/> Sat
<input type="checkbox"/> Tue	<input type="checkbox"/> Sun
<input type="checkbox"/> Wed	
<input type="checkbox"/> Thu	
<input type="checkbox"/> Fri	

Appears when Weekly is selected for the task frequency. Enter the frequency in weeks and select the day(s) of the week to run the task.

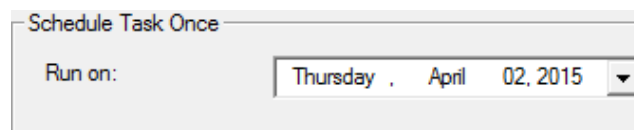


Schedule Task Monthly

☒ Day  of the month(s)

☐ The  of the month(s)

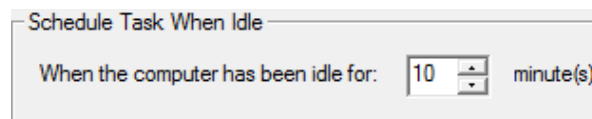
Appears when Monthly is chosen for the task frequency. Select either the Day of the month to run the task, or select The \_\_\_\_ of the month(s) and enter a week and day (e.g., the Third Friday of the month). Click Select Months to select specific month(s) to run the task.



Schedule Task Once

Run on:

Appears when Once is selected for the task frequency. Select the date to run the task.



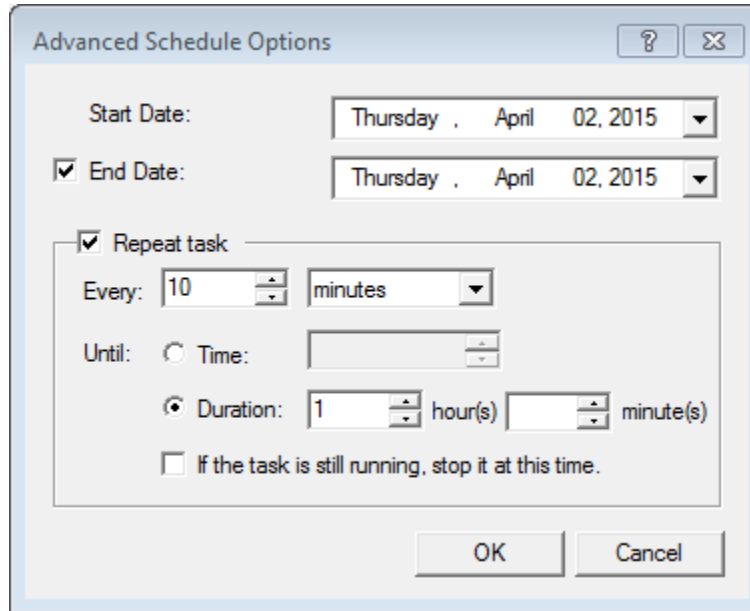
Schedule Task When Idle

When the computer has been idle for:  minute(s)

Appears when When idle is selected for the task frequency. Enter the number of minutes that the station must be idle before running the task.

- 19** To set up more than one schedule for this task, enable the **Show multiple schedules** check box.

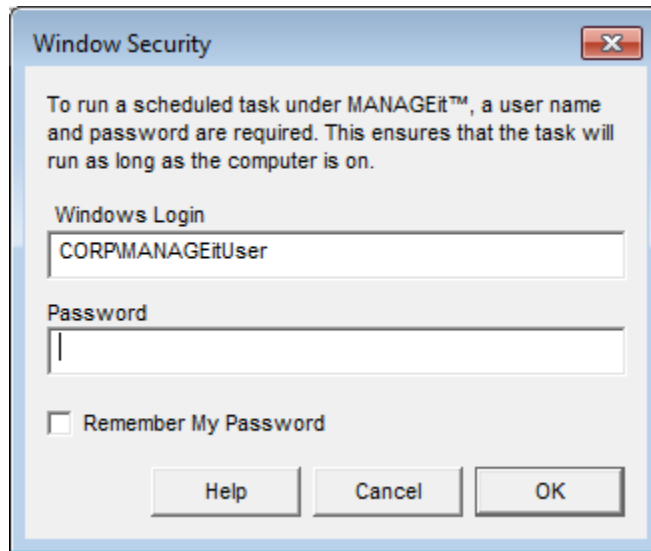
- 20 Click the **Advanced** button to access additional scheduling options.

The image shows a Windows-style dialog box titled "Advanced Schedule Options". It has a light blue header bar with a question mark icon and a close button (X). The dialog contains several fields and checkboxes. At the top, there is a "Start Date:" label followed by a date picker showing "Thursday , April 02, 2015". Below this is a checked checkbox for "End Date:" followed by another date picker showing the same date. Further down is a checked checkbox for "Repeat task:". Below this checkbox is a section for repeating the task. It includes an "Every:" label with a spinner box set to "10" and a dropdown menu set to "minutes". Below that is an "Until:" label with two radio buttons: "Time:" (unselected) and "Duration:" (selected). The "Duration:" option has a spinner box set to "1" followed by "hour(s)" and another spinner box followed by "minute(s)". At the bottom of this section is an unchecked checkbox labeled "If the task is still running, stop it at this time.". At the very bottom of the dialog are "OK" and "Cancel" buttons.

- 21 Enter the **Start Date** or use the arrow to select the date from a calendar.
- 22 Select the **End Date** check box and enter the date to stop running the task or use the arrow to select the date from a calendar, if needed.
- 23 Select the **Repeat Task** check box to configure how often to repeat the task. Choose to repeat it every selected number of minutes or hours, until a selected time, or for a selected number of minutes/hours. You can also select to stop the task by selecting the If the task is still running, stop it at this time check box.
- 24 Click **OK** in the Advanced Schedule Options window, then click **OK** in the Task Schedule window. The Task Wizard: Scheduling and Security window reappears.

**Task Scheduler**

- 25 Click **Configure** to set a user name and password to run the task(s). The Window Security window appears.



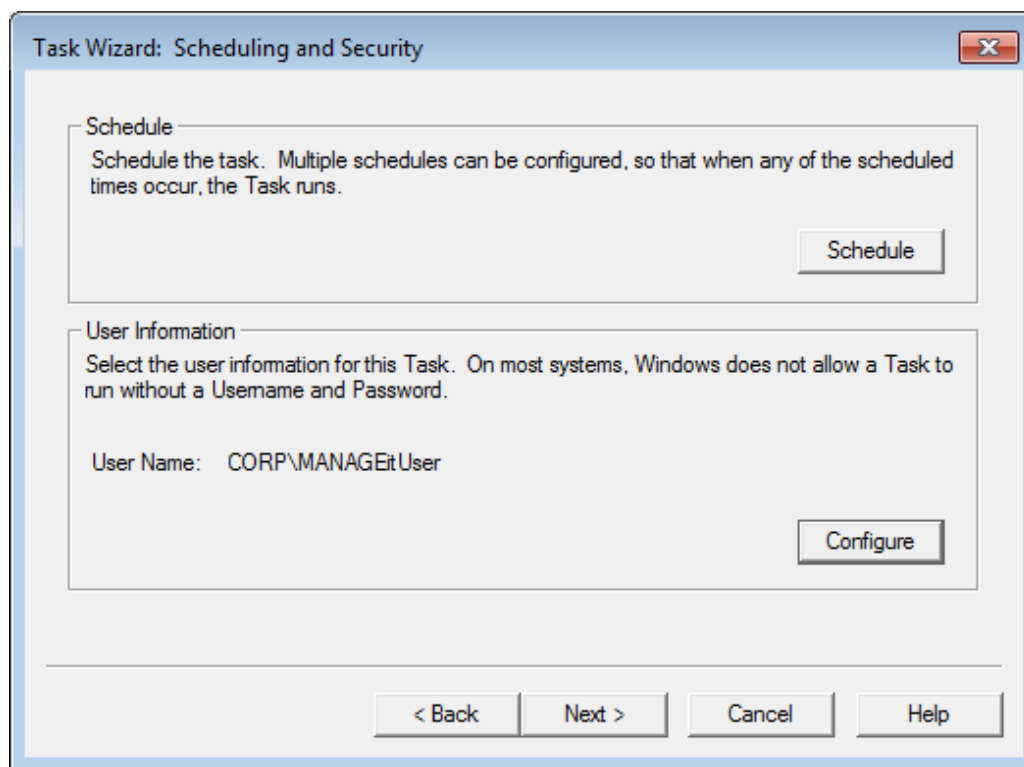
- 26 Enter a user name and password. The user identified must have access to all drives used by OCR for AnyDoc (such as the Control directory).



If you are using a networked path and a domain name is required, it must be entered with the user name for the task to run. Check with your System Administrator to determine if your network settings require a domain name.

- 27 Select the **Remember My Password** check box to carry out the task without running MANAGEit. Selecting this check box also avoids being prompted every time you update the task.
- 28 Click **OK** when finished.

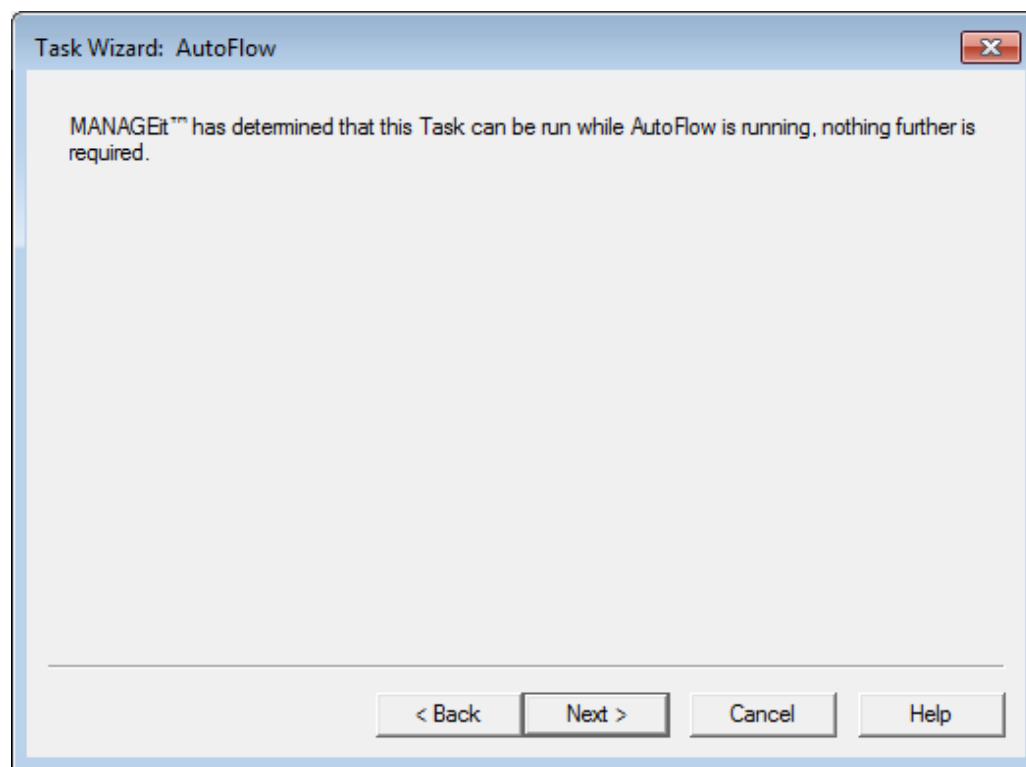
The **Scheduling and Security** window displays the configured user name.



**29** Click **Next**.

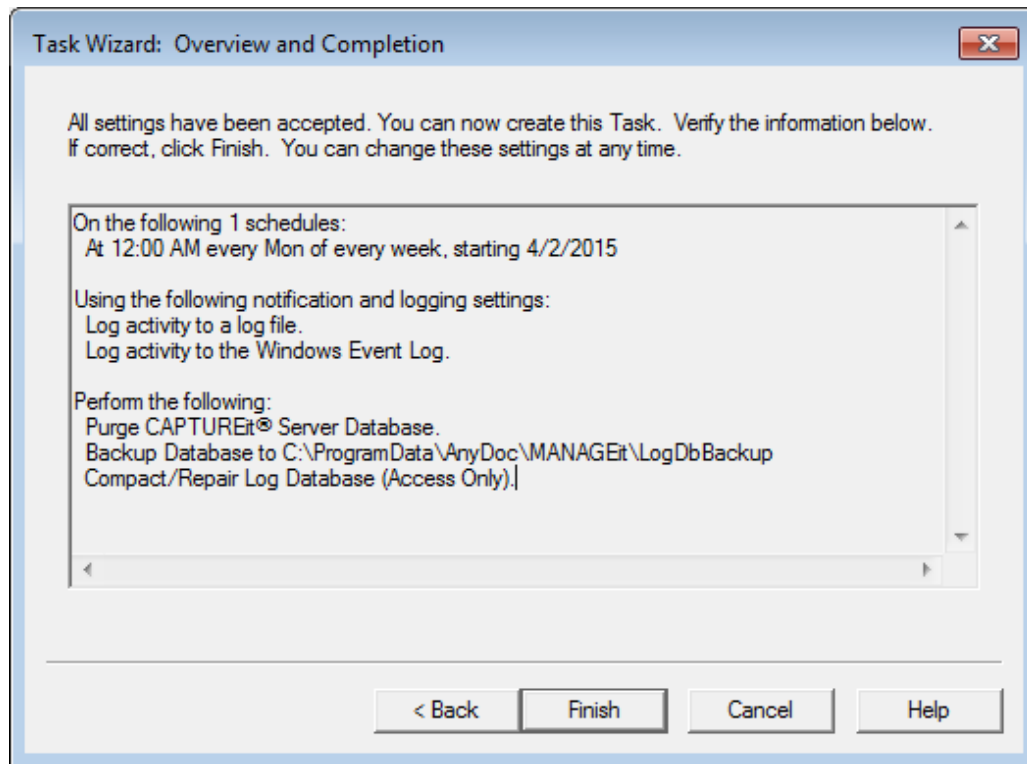
**Task Scheduler**

The **Task Wizard: AutoFlow** window is displayed.

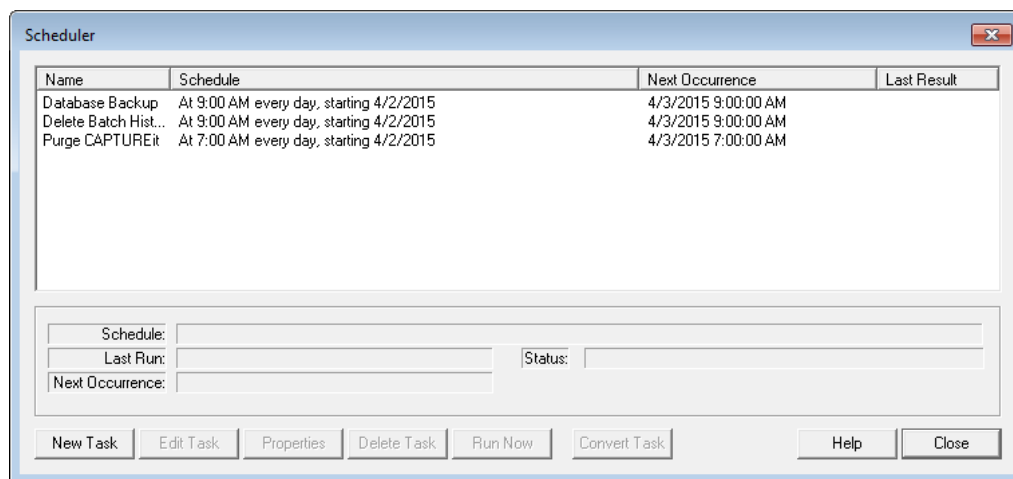


**30** Click **Next**.

The **Task Wizard: Overview and Completion** window displays information concerning the task you have just scheduled.




- 31 Click **Back** to return to edit a selected task or click **Finish** to run the task on the configured schedule. The **Scheduler** window displays the configured tasks.

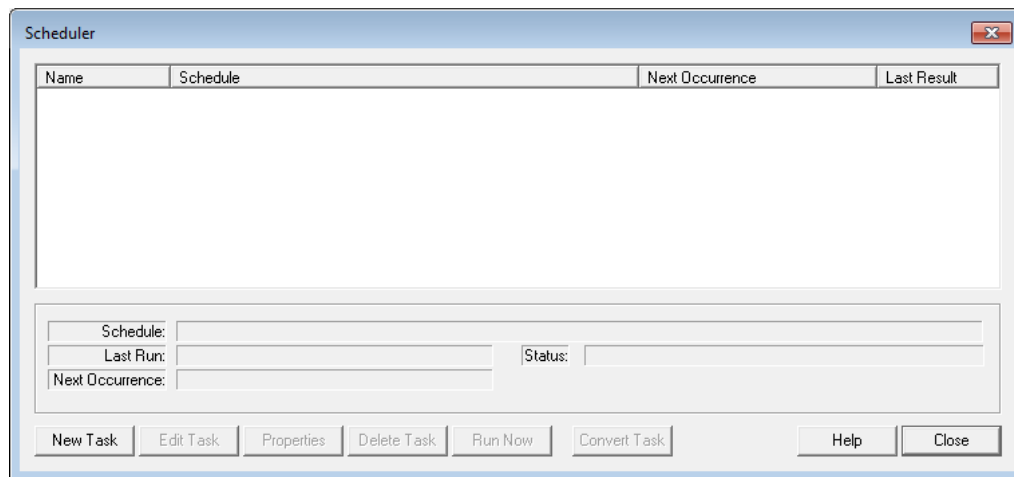


## Backup the Log Database

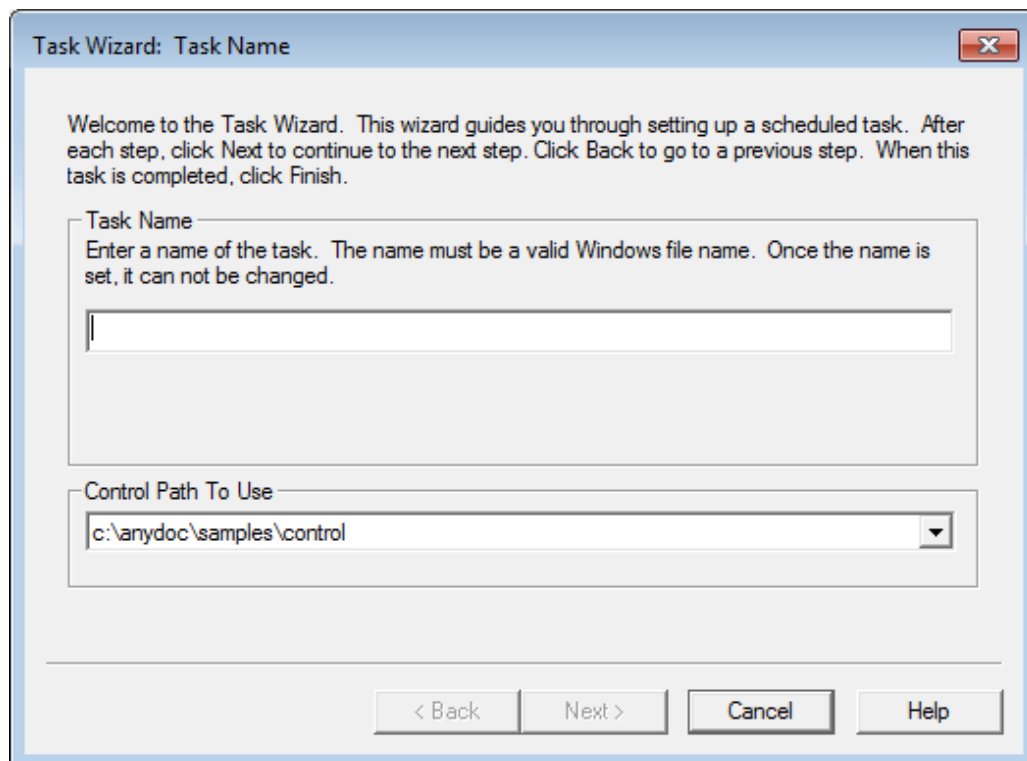
You can schedule a task to compact and repair the log database using the MANAGEit Task Scheduler.

**Task Scheduler****Steps**

- 1 Open the MANAGEit Task Scheduler by performing one of the following steps:
  - Select **Settings | MANAGEit Task Scheduler**.
  - Click the **MANAGEit Task Scheduler** button . The **Scheduler** window is displayed.



- 2 Click **New Task**. The **Task Wizard: Task Name** window is displayed.





- 3 In the **Task Name** field, enter a name for the new task. This name must be a valid DOS long file name. After you enter a task name and go to the next page, the name cannot be changed. If you enter an invalid character, it appears in red and the station beeps as a warning.
- 4 Select a **Control Path To Use**. All control paths currently being monitored are listed.



Each task only applies to one control path. If multiple control paths are being monitored, you must schedule separate tasks for each control path.

- 5 Click **Next**. The **Task Wizard: Logging and Notification** window is displayed.

- 6 Select the **Log All Task Information To Text Files** check box to create text files with a trace of all steps taken by a task while performing its assigned actions. The log files are created in C:\ProgramData\AnyDoc\MANAGEit\Jobs and have the same name as the scheduled task.
- 7 Select the **Log Task Information To Windows Event Log** check box to create a record of a task's start and end in the Windows Event Log. Any errors occurring during processing are also recorded in the Windows Event Log. The Event Log is available from **Start | Control Panel | Administrative Tools | Event Viewer**. The Event Viewer allows you to see the start and end of MANAGEit tasks from other stations.

**Task Scheduler**

- 8 In the **Notification** area, select e-mail notification for one or both of the following:

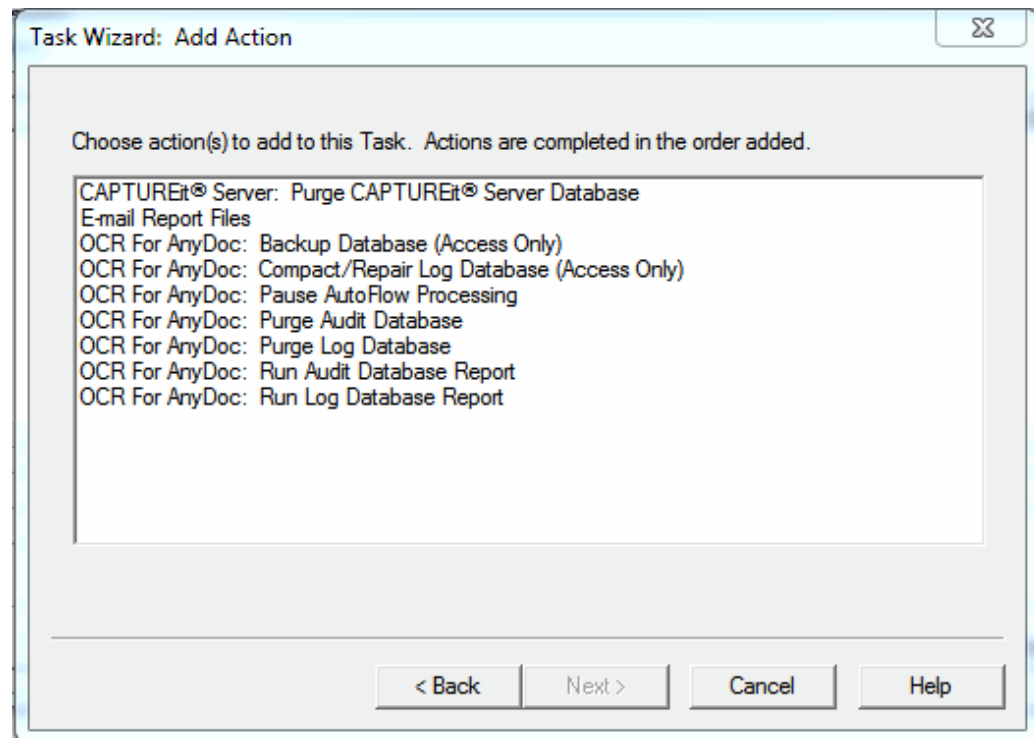
- **E-Mail Error Information on Failure**
- **E-Mail Notification When Task Completes Successfully**

Selecting either of these e-mail notifications activates the **Configure** button. Click **Configure** to specify e-mail recipients. See E-mail Alert Notifications (page 97).



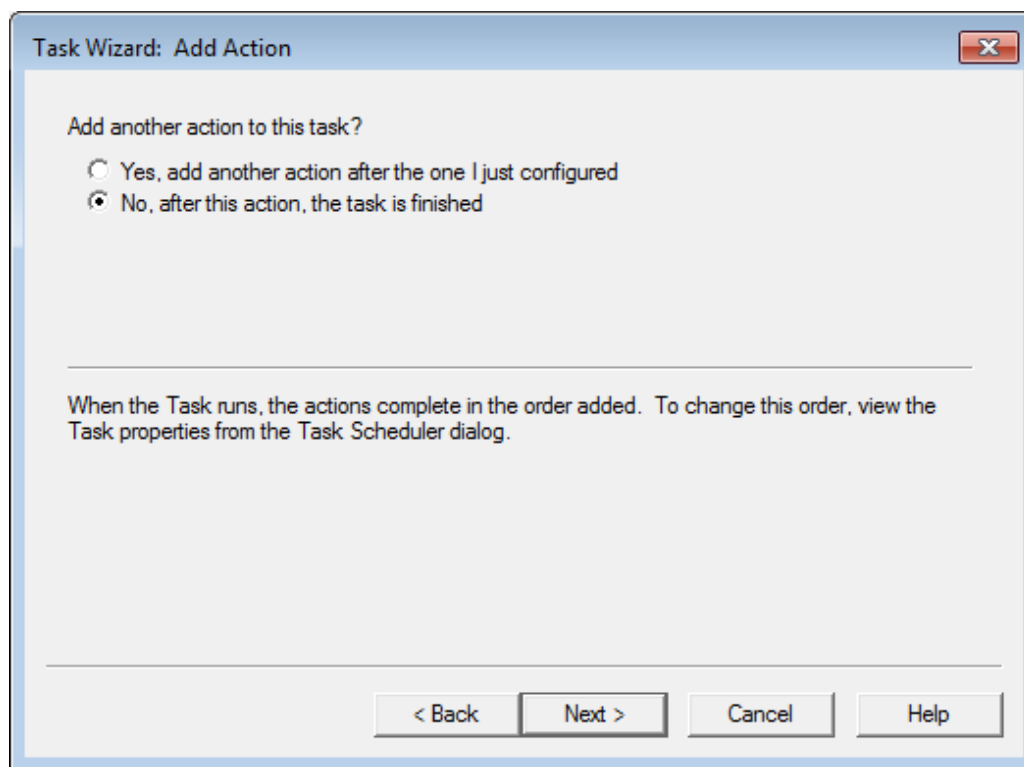
If either of the options in the Logging area are selected, the log file is sent with the e-mail notification.

- 9 Click **Next**. The **Task Wizard: Add Action** window is displayed.



- 10 Select **Compact/Repair Log Database** and click **Next**.

The **Task Wizard: Add Action** window is displayed.



- 11** Select **Yes** to add another action to the same task. Repeat previous steps until all actions have been added

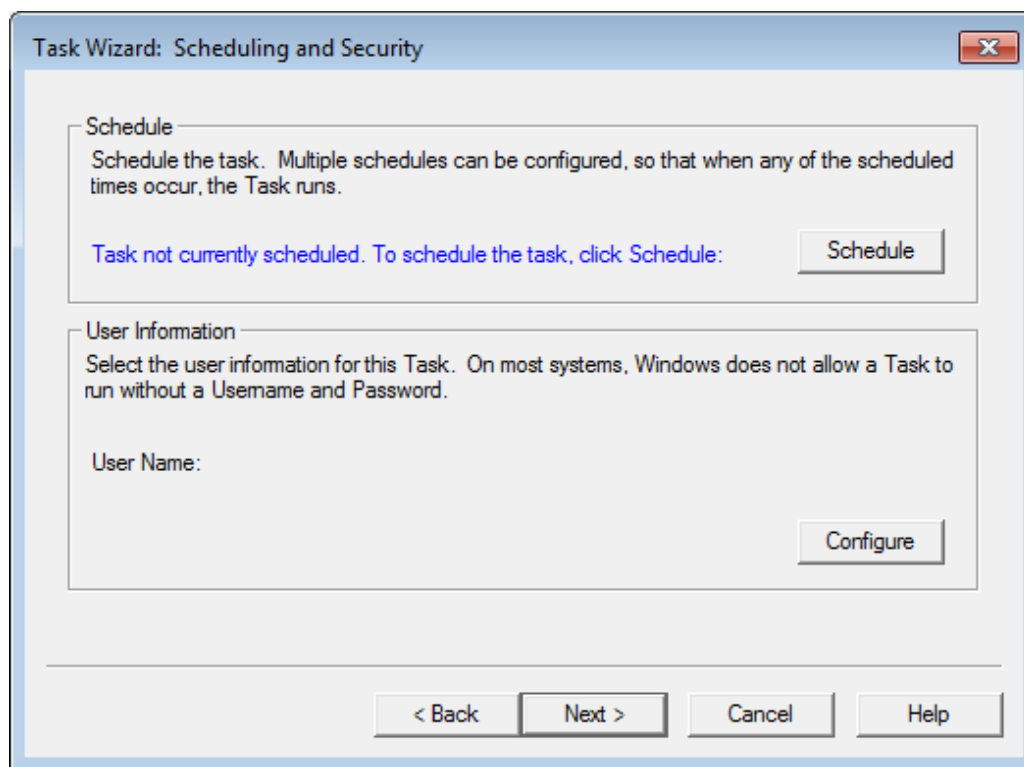
OR

Select **No** if you have finished adding actions.

- 12** Click **Next** to schedule the task and set appropriate security.

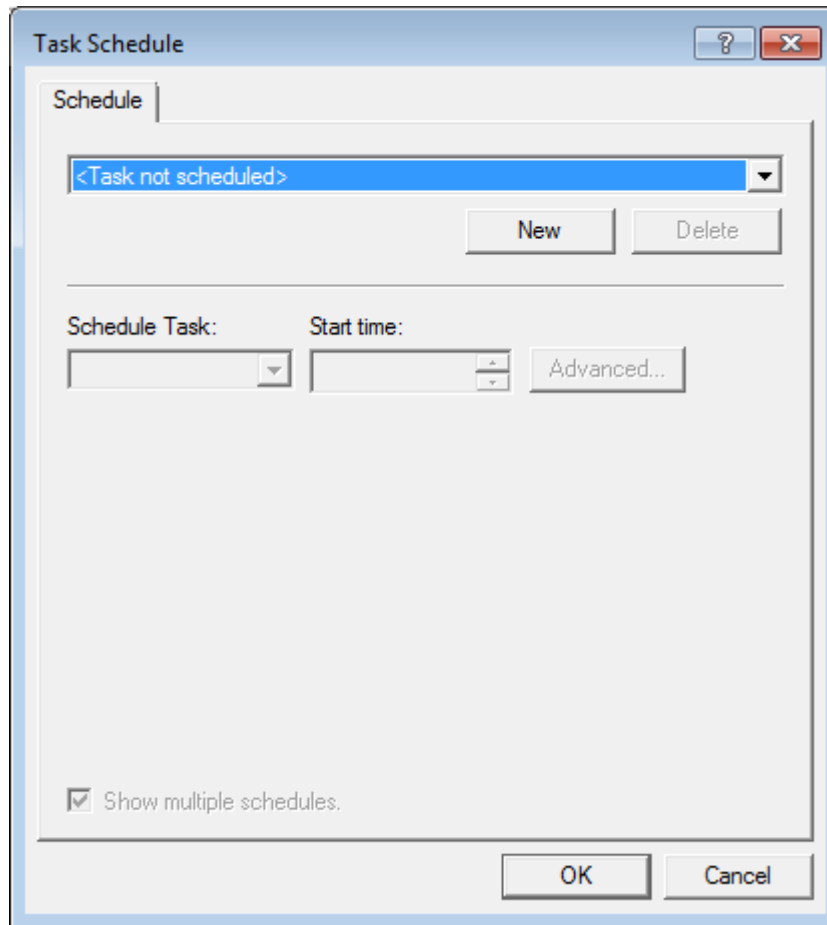
**Task Scheduler**

The **Task Wizard: Scheduling and Security** window is displayed.



**13** Click **Schedule**.

The **Task Schedule** window is displayed.



- 14 Click **New** to create a schedule for this task.

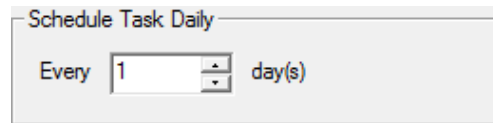
You can create multiple schedules for a single task. The **Schedule** tab reflects the new schedule that you are creating. Click the arrow for a list of schedules that have already been created for this task. This field only appears if **Show multiple schedules** is selected.

- 15 Select an option from the **Schedule Task** menu to select how frequently the task is performed.



It is strongly recommended that you do not schedule tasks to run At System Startup, At Logon, or When idle. These schedule items require user intervention.

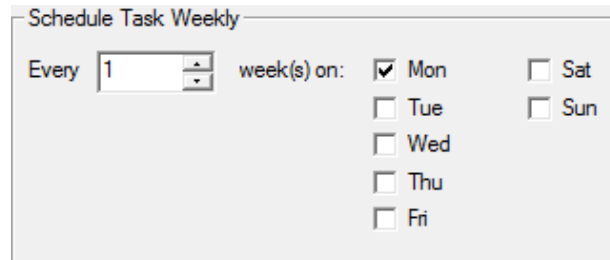
- 16 If **Daily**, **Weekly**, **Monthly**, or **Once** was selected from the **Schedule Task** menu, enter a **Start Time** for the task. Depending on the option selected from the **Schedule Task** menu the **Schedule Task** section offers different options.

**Task Scheduler**


Schedule Task Daily

Every  day(s)

Appears when Daily is chosen for the task frequency. Enter the frequency in days.

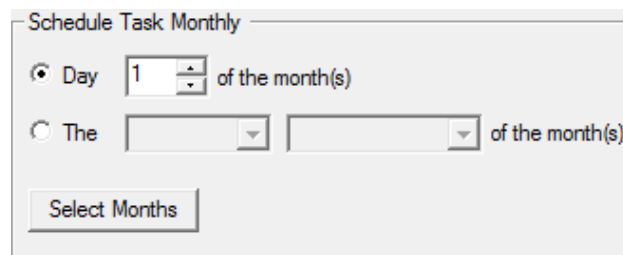


Schedule Task Weekly

Every  week(s) on:

<input checked="" type="checkbox"/> Mon	<input type="checkbox"/> Sat
<input type="checkbox"/> Tue	<input type="checkbox"/> Sun
<input type="checkbox"/> Wed	
<input type="checkbox"/> Thu	
<input type="checkbox"/> Fri	

Appears when Weekly is selected for the task frequency. Enter the frequency in weeks and select the day(s) of the week to run the task.

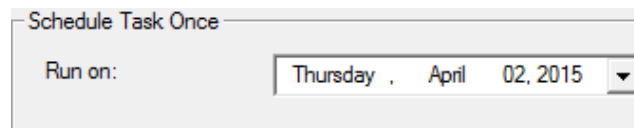


Schedule Task Monthly

☒ Day  of the month(s)

☐ The  of the month(s)

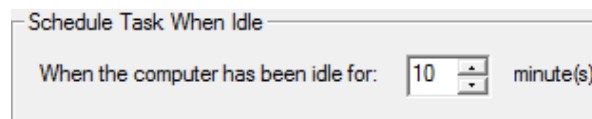
Appears when Monthly is chosen for the task frequency. Select either the Day of the month to run the task, or select The \_\_\_\_ of the month(s) and enter a week and day (e.g., the Third Friday of the month). Click Select Months to select specific month(s) to run the task.



Schedule Task Once

Run on:

Appears when Once is selected for the task frequency. Select the date to run the task.



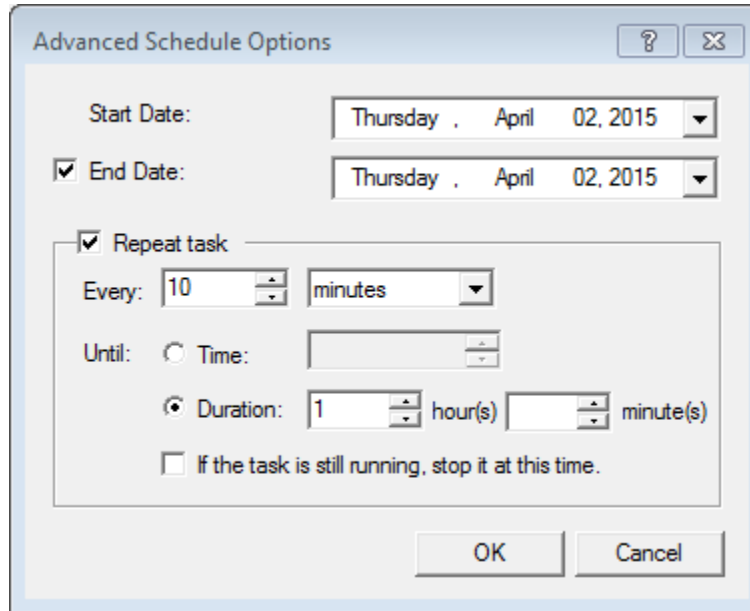
Schedule Task When Idle

When the computer has been idle for:  minute(s)

Appears when When idle is selected for the task frequency. Enter the number of minutes that the station must be idle before running the task.

- 17** To set up more than one schedule for this task, enable the **Show multiple schedules** check box.

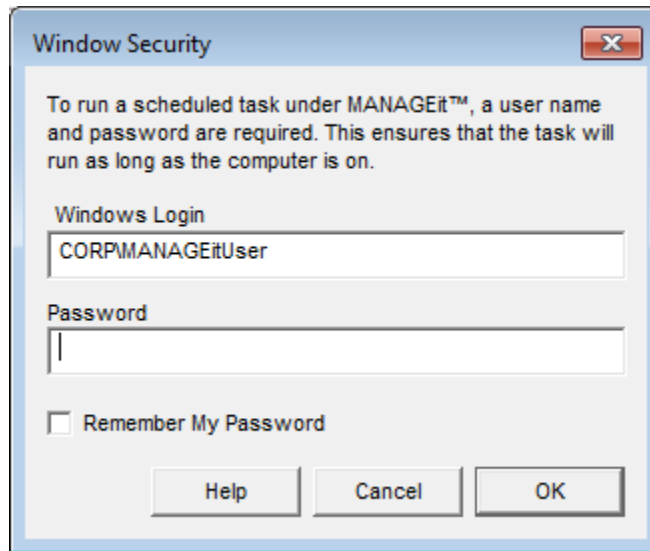
- 18 Click the **Advanced** button to access additional scheduling options.

The image shows a Windows-style dialog box titled "Advanced Schedule Options". It has a question mark icon and a close (X) icon in the top right corner. The dialog contains several fields and checkboxes. At the top, there is a "Start Date:" label followed by a date picker showing "Thursday , April 02, 2015". Below this is a checked checkbox labeled "End Date:" followed by another date picker showing "Thursday , April 02, 2015". Underneath is another checked checkbox labeled "Repeat task". Below the "Repeat task" checkbox is a section for configuring the repeat interval. It starts with "Every:" followed by a spinner box set to "10" and a dropdown menu set to "minutes". Below this is an "Until:" label with two radio buttons. The first radio button is labeled "Time:" and is currently unselected, with an empty time field next to it. The second radio button is labeled "Duration:" and is selected, followed by a spinner box set to "1", a dropdown menu set to "hour(s)", another spinner box, and a dropdown menu set to "minute(s)". At the bottom of this section is an unchecked checkbox labeled "If the task is still running, stop it at this time.". At the very bottom of the dialog are "OK" and "Cancel" buttons.

- 19 Enter the **Start Date** or use the arrow to select the date from a calendar.
- 20 Select the **End Date** check box and enter the date to stop running the task or use the arrow to select the date from a calendar, if needed.
- 21 Select the **Repeat Task** check box to configure how often to repeat the task. Choose to repeat it every selected number of minutes or hours, until a selected time, or for a selected number of minutes/hours. You can also select to stop the task by selecting the If the task is still running, stop it at this time check box.
- 22 Click **OK** in the Advanced Schedule Options window, then click **OK** in the Task Schedule window. The Task Wizard: Scheduling and Security window reappears.

**Task Scheduler**

- 23 Click **Configure** to set a user name and password to run the task(s). The Window Security window appears.



- 24 Enter a user name and password. The user identified must have access to all drives used by OCR for AnyDoc (such as the Control directory).

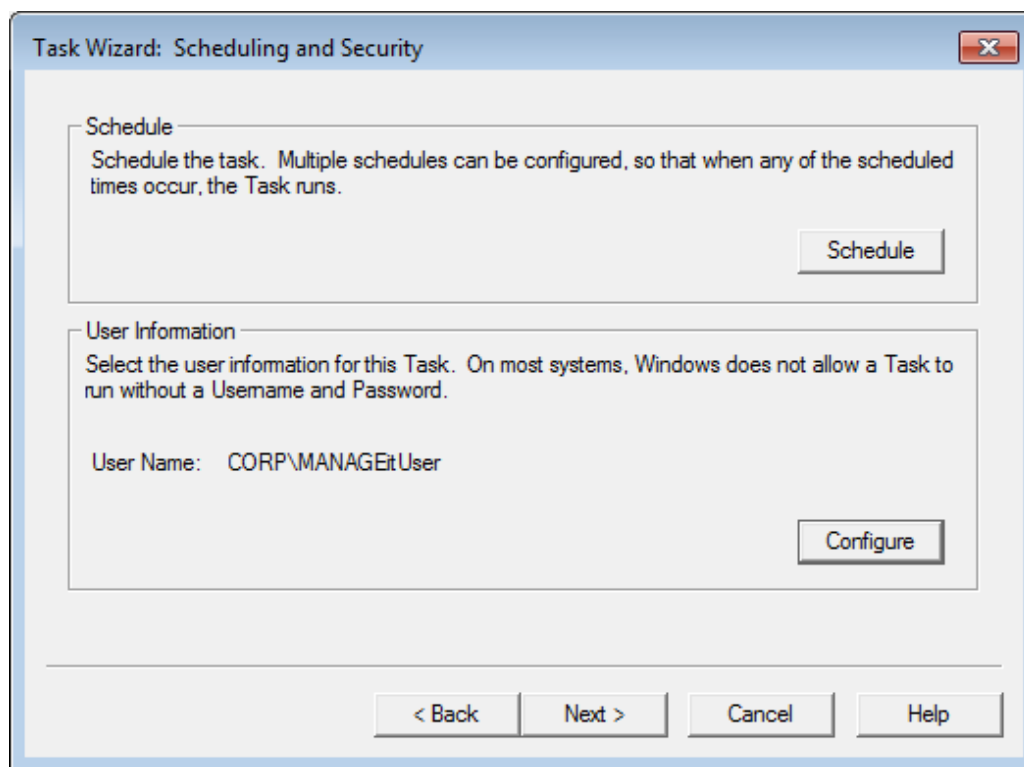


If you are using a networked path and a domain name is required, it must be entered with the user name for the task to run. Check with your System Administrator to determine if your network settings require a domain name.

- 25 Select the **Remember My Password** check box to carry out the task without running MANAGEit. Selecting this check box also avoids being prompted every time you update the task.
- 26 Click **OK** when finished.



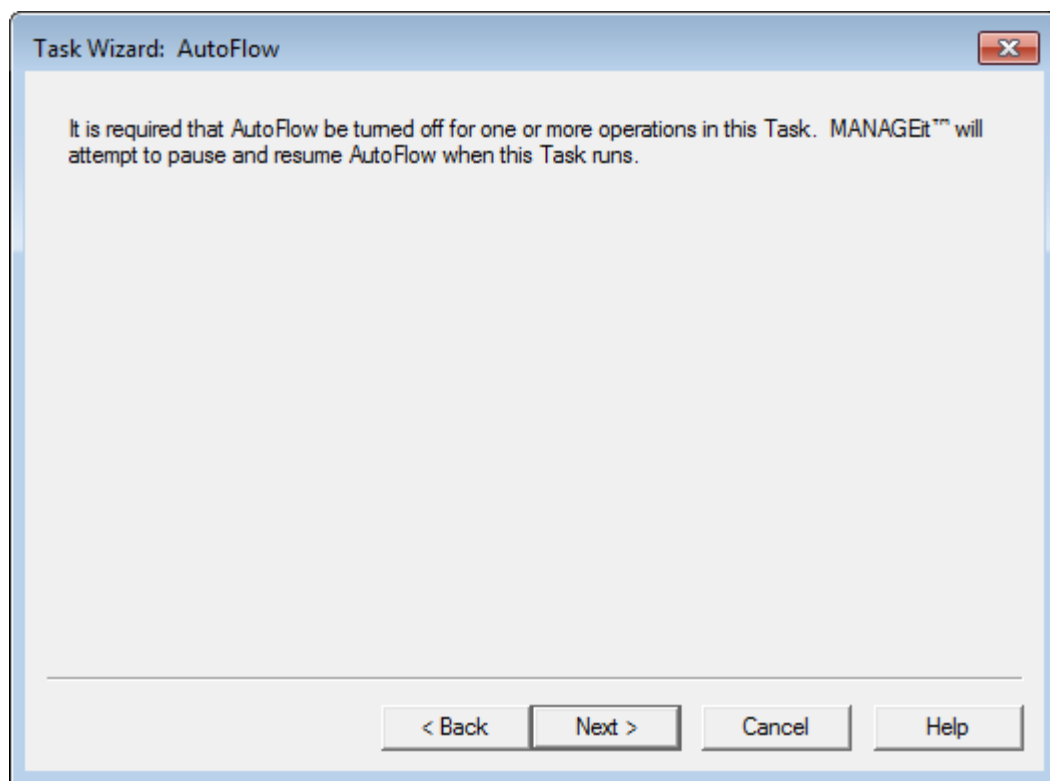
The **Scheduling and Security** window displays the configured user name.



**27** Click **Next**.

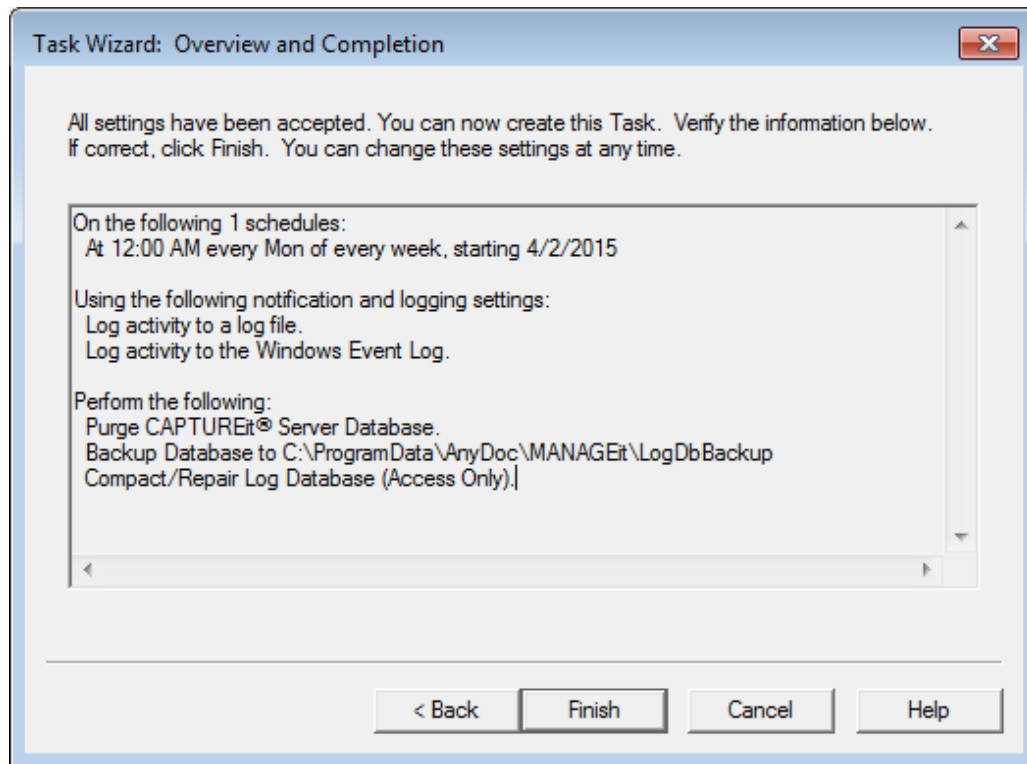
**Task Scheduler**

The **Task Wizard: AutoFlow** window is displayed. This window informs you that MANAGEit must pause AutoFlow while running the task.

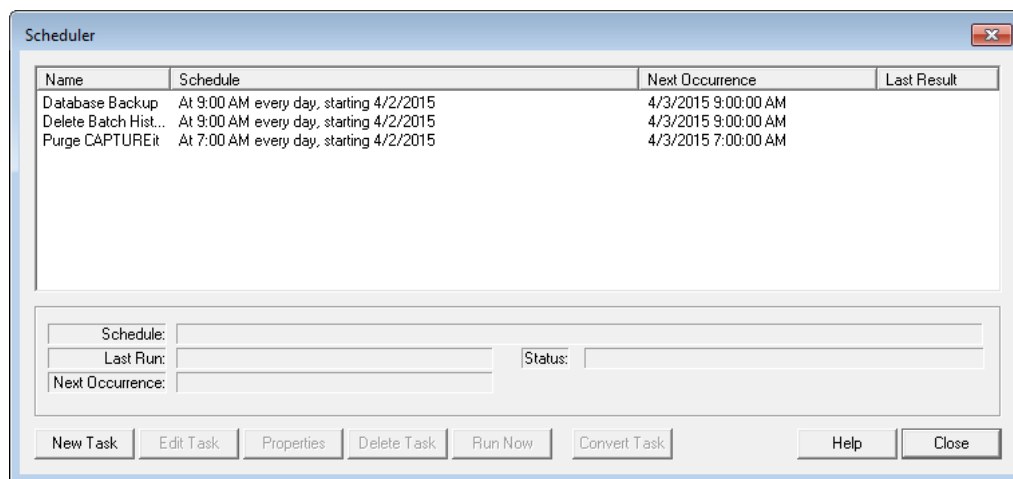


**28** Click **Next**.

The **Task Wizard: Overview and Completion** window displays information concerning the task you have just scheduled.




- 29 Click **Back** to return to edit a selected task or click **Finish** to run the task on the configured schedule. The **Scheduler** window displays the configured tasks.

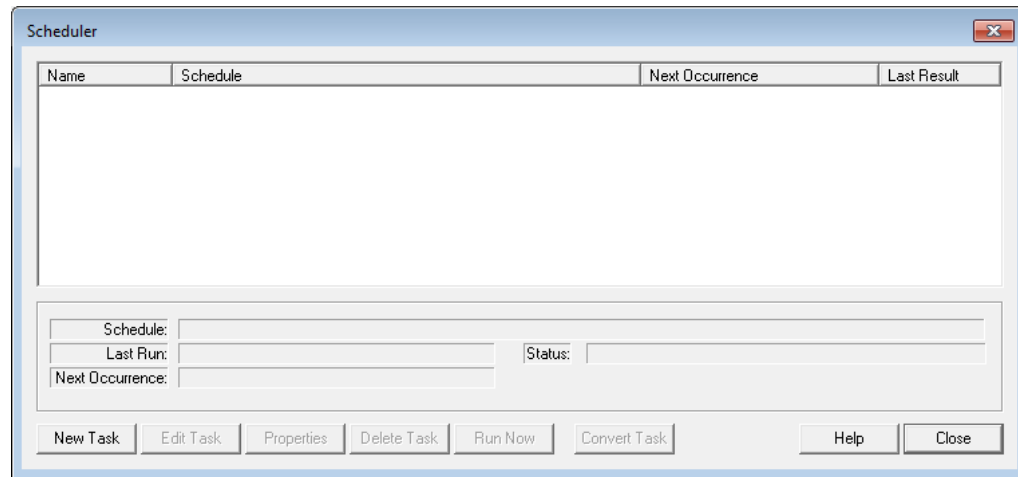


## Purge the Log Database

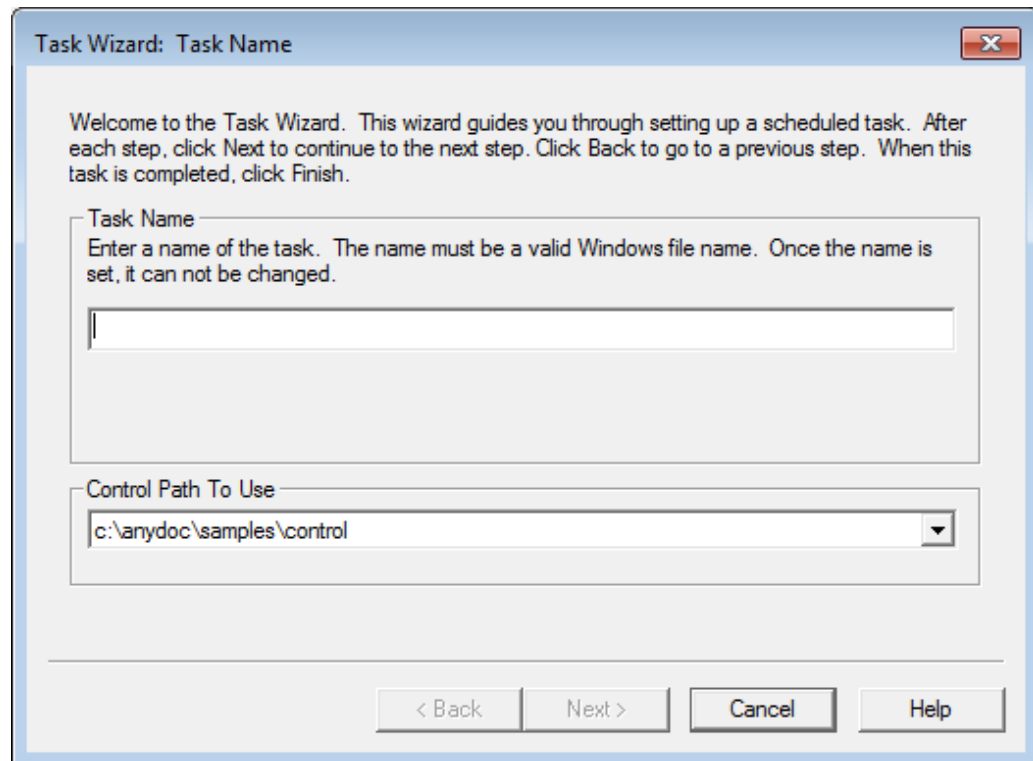
You can schedule to purge records older than a specified number of days from the either the version 4.0 log database or the prior version log database using the Task Scheduler.

**Task Scheduler****Steps**

- 1 Open the MANAGEit Task Scheduler by performing one of the following steps:
  - Select **Settings | MANAGEit Task Scheduler**.
  - Click the **MANAGEit Task Scheduler** button . The **Scheduler** window is displayed.



- 2 Click **New Task**. The **Task Wizard: Task Name** window is displayed.



- 3 In the **Task Name** field, enter a name for the new task. This name must be a valid DOS long file name. After you enter a task name and go to the next page, the name cannot be changed. If you enter an invalid character, it appears in red and the station beeps as a warning.
- 4 Select a **Control Path To Use**. All control paths currently being monitored are listed.



Each task only applies to one control path. If multiple control paths are being monitored, you must schedule separate tasks for each control path.

- 5 Click **Next**. The **Task Wizard: Logging and Notification** window is displayed.

- 6 Select the **Log All Task Information To Text Files** check box to create text files with a trace of all steps taken by a task while performing its assigned actions. The log files are created in C:\ProgramData\AnyDoc\MANAGEit\Jobs and have the same name as the scheduled task.
- 7 Select the **Log Task Information To Windows Event Log** check box to create a record of a task's start and end in the Windows Event Log. Any errors occurring during processing are also recorded in the Windows Event Log. The Event Log is available from **Start | Control Panel | Administrative Tools | Event Viewer**. The Event Viewer allows you to see the start and end of MANAGEit tasks from other stations.

**Task Scheduler**

- 8 In the **Notification** area, select e-mail notification for one or both of the following:

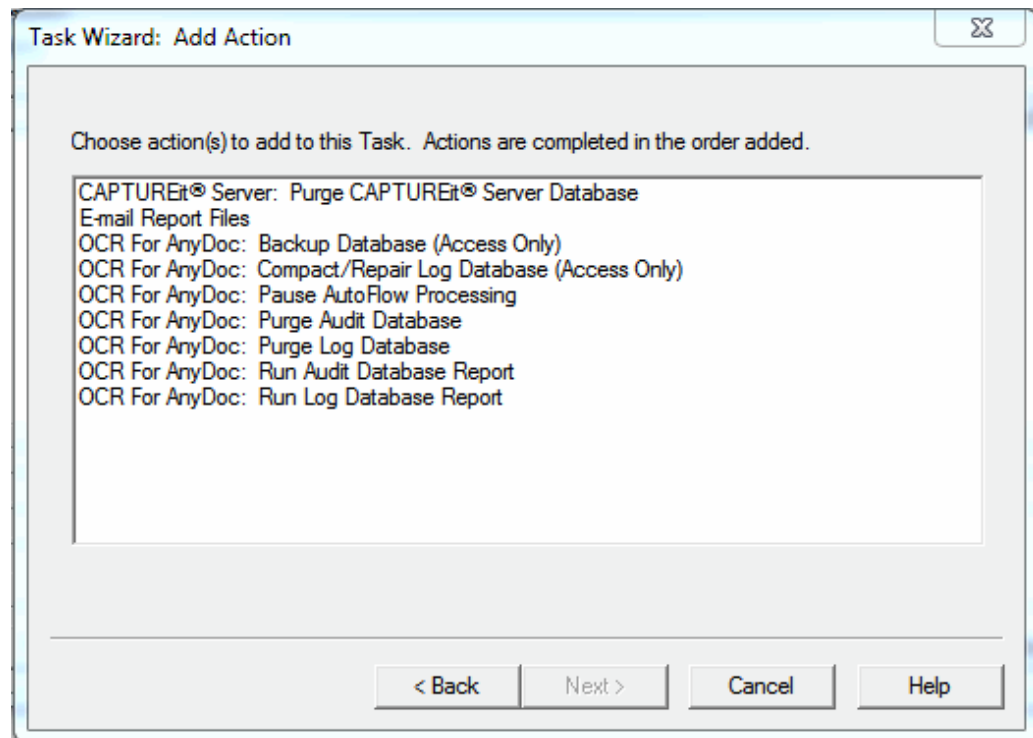
- **E-Mail Error Information on Failure**
- **E-Mail Notification When Task Completes Successfully**

Selecting either of these e-mail notifications activates the **Configure** button. Click **Configure** to specify e-mail recipients. See E-mail Alert Notifications (page 97).

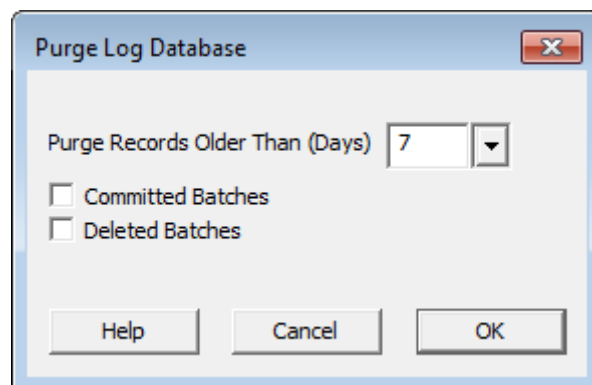


If either of the options in the Logging area are selected, the log file is sent with the e-mail notification.

- 9 Click **Next**. The **Task Wizard: Add Action** window is displayed.



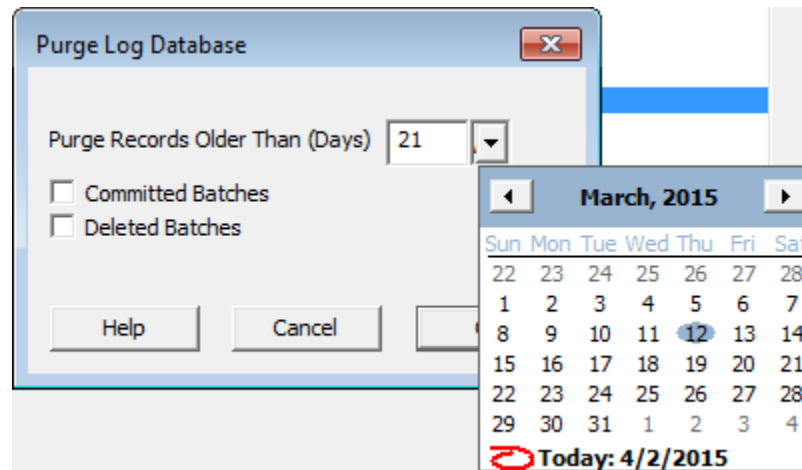
- 10 Select **Purge Log Database** from the Task Wizard: Add Action window and click **Next**. The Log Database Purge Criteria window is displayed.



- 11 In the **Purge data older than \_\_\_\_ Days** field, enter the number of days of data to retain in the database

OR

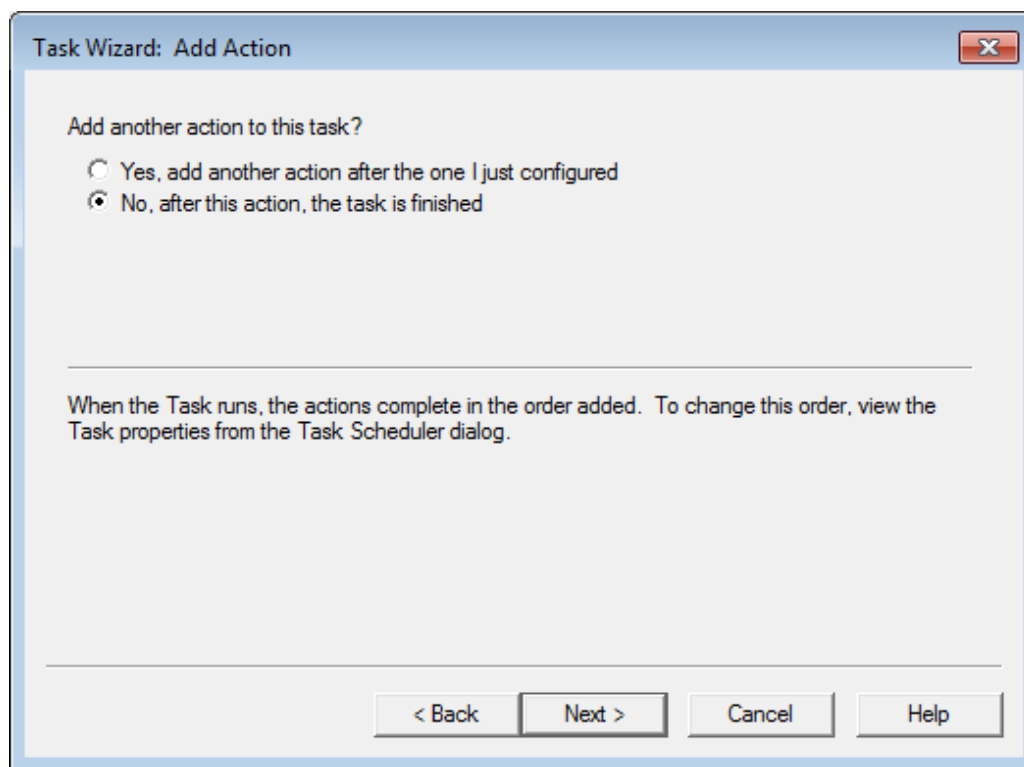
Click the arrow to the right of the field to select the date from a calendar and click **OK**. Data older than this date is purged.



- 12 Enable the **Committed Batches** check box to purge committed batch information older than the specified number of days.
- 13 Enable the **Deleted Batches** check box to purge information for deleted batches older than the specified number of days.
- 14 Click **OK**.

**Task Scheduler**

The **Task Wizard: Add Action** window is displayed.



- 15** Select **Yes** to add another action to the same task. Repeat previous steps until all actions have been added

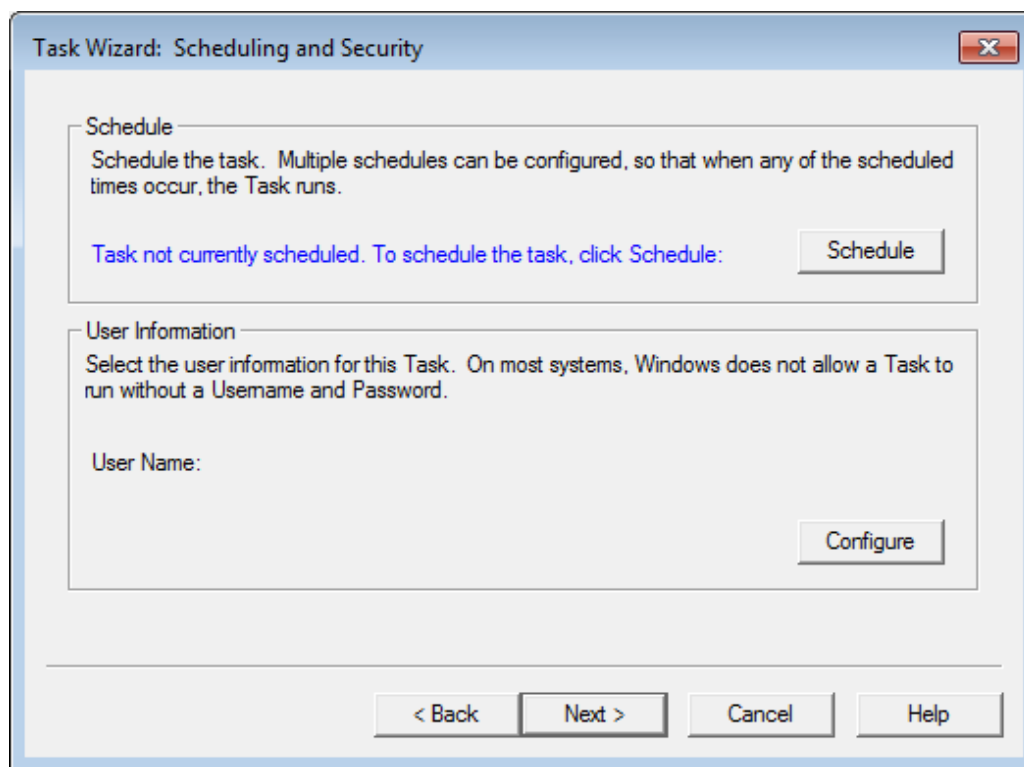
OR

Select **No** if you have finished adding actions.

- 16** Click **Next** to schedule the task and set appropriate security.



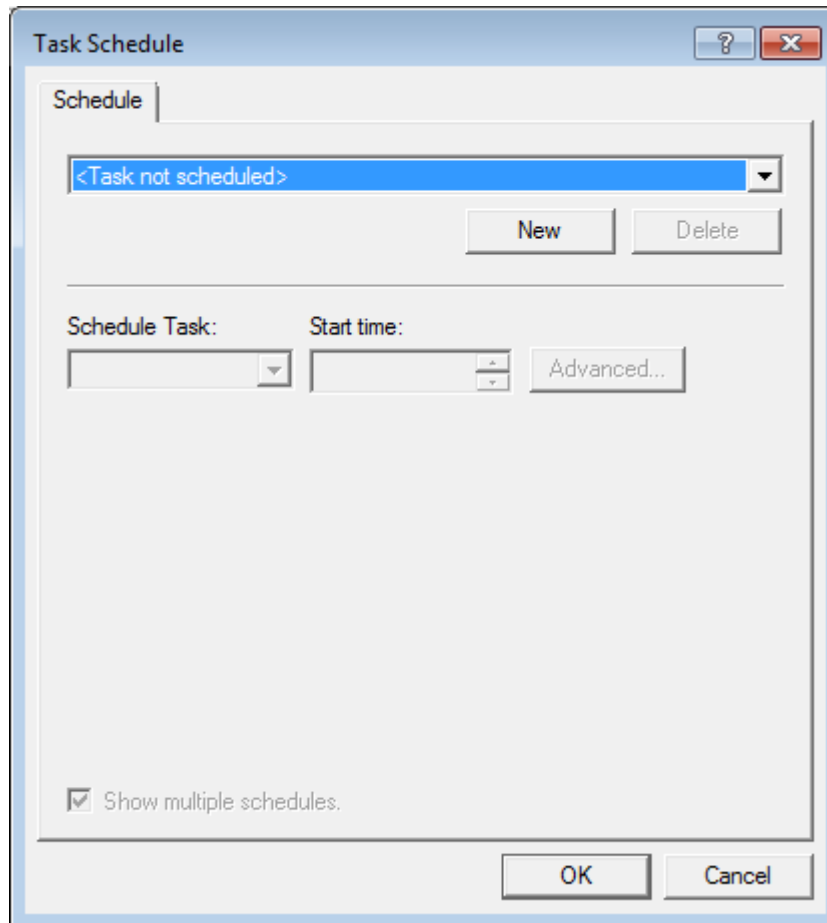
The **Task Wizard: Scheduling and Security** window is displayed.



**17** Click **Schedule**.

**Task Scheduler**

The **Task Schedule** window is displayed.



- 18 Click **New** to create a schedule for this task.

You can create multiple schedules for a single task. The **Schedule** tab reflects the new schedule that you are creating. Click the arrow for a list of schedules that have already been created for this task. This field only appears if **Show multiple schedules** is selected.

- 19 Select an option from the **Schedule Task** menu to select how frequently the task is performed.



It is strongly recommended that you do not schedule tasks to run At System Startup, At Logon, or When idle. These schedule items require user intervention.

- 20 If **Daily**, **Weekly**, **Monthly**, or **Once** was selected from the **Schedule Task** menu, enter a **Start Time** for the task. Depending on the option selected from the **Schedule Task** menu the **Schedule Task** section offers different options.

**Schedule Task Daily**

Every  day(s)

Appears when Daily is chosen for the task frequency. Enter the frequency in days.

**Schedule Task Weekly**

Every  week(s) on:

<input checked="" type="checkbox"/> Mon	<input type="checkbox"/> Sat
<input type="checkbox"/> Tue	<input type="checkbox"/> Sun
<input type="checkbox"/> Wed	
<input type="checkbox"/> Thu	
<input type="checkbox"/> Fri	

Appears when Weekly is selected for the task frequency. Enter the frequency in weeks and select the day(s) of the week to run the task.

**Schedule Task Monthly**

☒ Day  of the month(s)

☐ The  of the month(s)

Appears when Monthly is chosen for the task frequency. Select either the Day of the month to run the task, or select The \_\_\_\_ of the month(s) and enter a week and day (e.g., the Third Friday of the month). Click Select Months to select specific month(s) to run the task.

**Schedule Task Once**

Run on:

Appears when Once is selected for the task frequency. Select the date to run the task.

**Schedule Task When Idle**

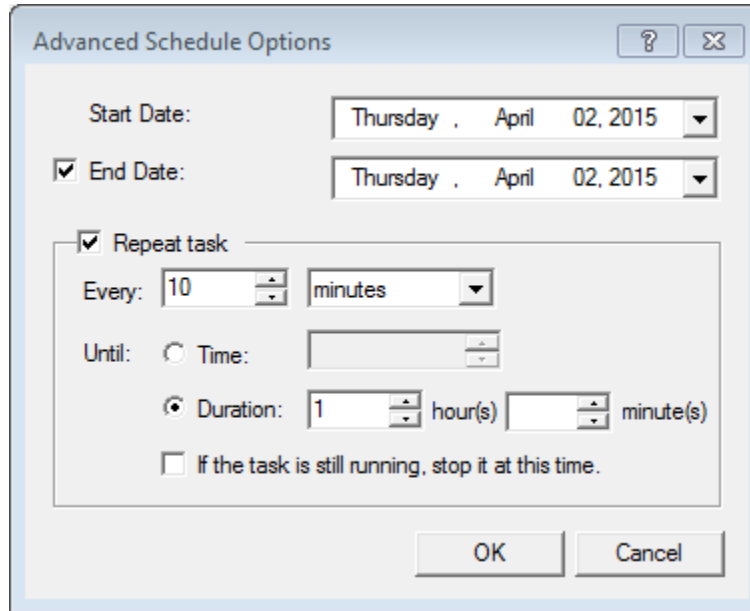
When the computer has been idle for:  minute(s)

Appears when When idle is selected for the task frequency. Enter the number of minutes that the station must be idle before running the task.

- 21** To set up more than one schedule for this task, enable the **Show multiple schedules** check box.

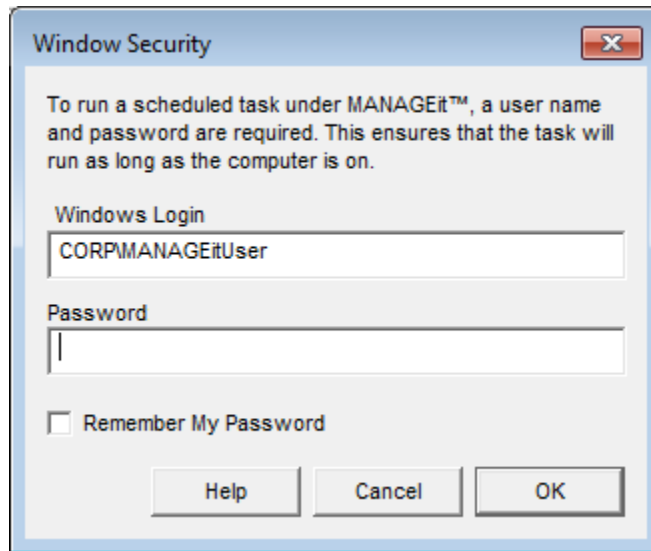
**Task Scheduler**

- 22 Click the **Advanced** button to access additional scheduling options.

The image shows a Windows-style dialog box titled "Advanced Schedule Options". It has a light blue title bar with a question mark icon and a close button (X). The dialog contains several fields and checkboxes. At the top, there is a "Start Date:" label followed by a date picker showing "Thursday , April 02, 2015". Below this is a checked checkbox for "End Date:" followed by another date picker showing "Thursday , April 02, 2015". Underneath is a checked checkbox for "Repeat task". Below the "Repeat task" checkbox is a group box containing scheduling options. It has an "Every:" label with a spinner box set to "10" and a dropdown menu set to "minutes". Below that is an "Until:" label with two radio buttons: "Time:" (unselected) and "Duration:" (selected). The "Duration:" option has a spinner box set to "1" followed by "hour(s)" and another spinner box followed by "minute(s)". At the bottom of the group box is an unchecked checkbox labeled "If the task is still running, stop it at this time.". At the bottom of the dialog are "OK" and "Cancel" buttons.

- 23 Enter the **Start Date** or use the arrow to select the date from a calendar.
- 24 Select the **End Date** check box and enter the date to stop running the task or use the arrow to select the date from a calendar, if needed.
- 25 Select the **Repeat Task** check box to configure how often to repeat the task. Choose to repeat it every selected number of minutes or hours, until a selected time, or for a selected number of minutes/hours. You can also select to stop the task by selecting the If the task is still running, stop it at this time check box.
- 26 Click **OK** in the Advanced Schedule Options window, then click **OK** in the Task Schedule window. The Task Wizard: Scheduling and Security window reappears.

- 27 Click **Configure** to set a user name and password to run the task(s). The Window Security window appears.



- 28 Enter a user name and password. The user identified must have access to all drives used by OCR for AnyDoc (such as the Control directory).

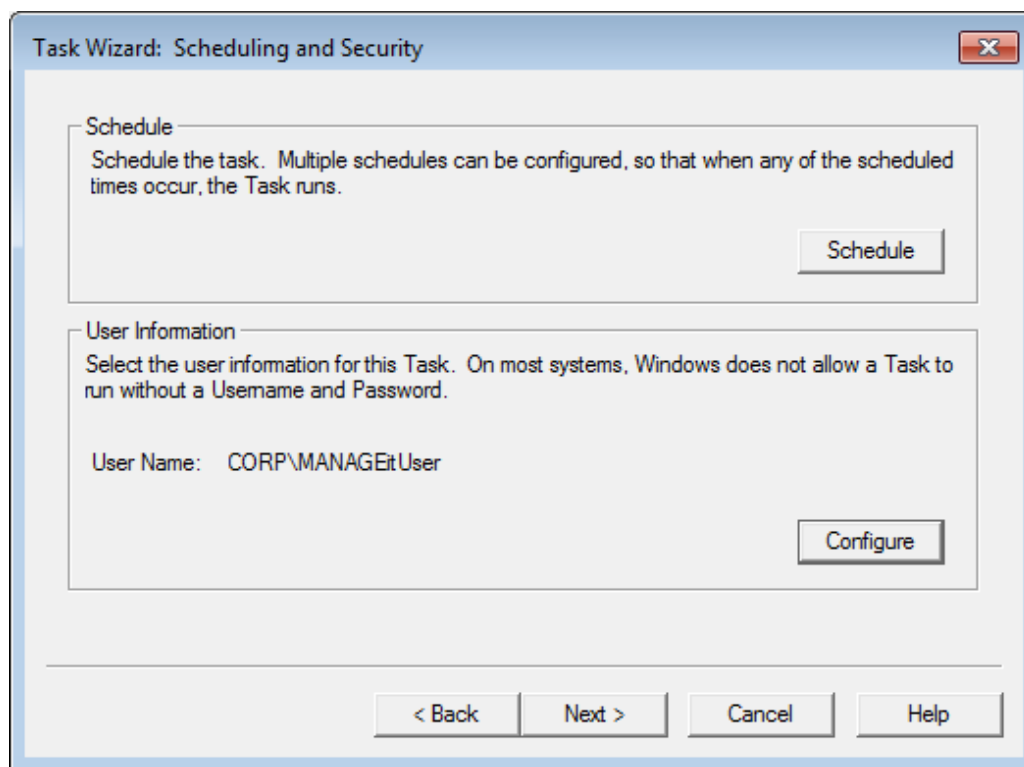


If you are using a networked path and a domain name is required, it must be entered with the user name for the task to run. Check with your System Administrator to determine if your network settings require a domain name.

- 29 Select the **Remember My Password** check box to carry out the task without running MANAGEit. Selecting this check box also avoids being prompted every time you update the task.
- 30 Click **OK** when finished.

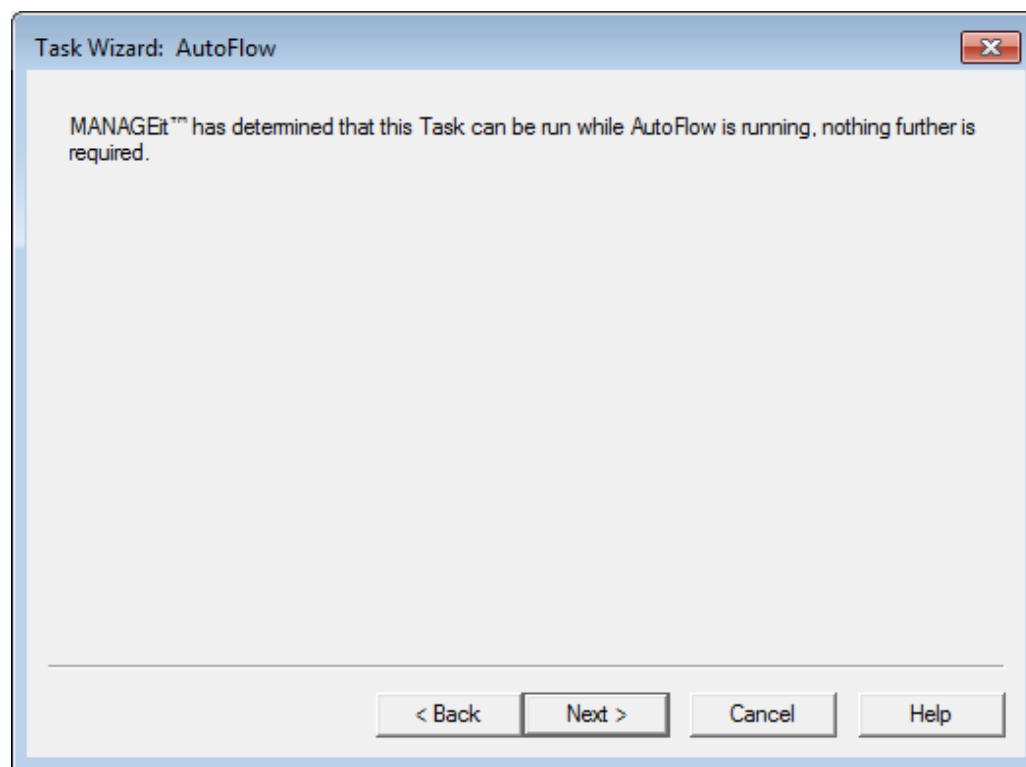
**Task Scheduler**

The **Scheduling and Security** window displays the configured user name.



**31** Click **Next**.

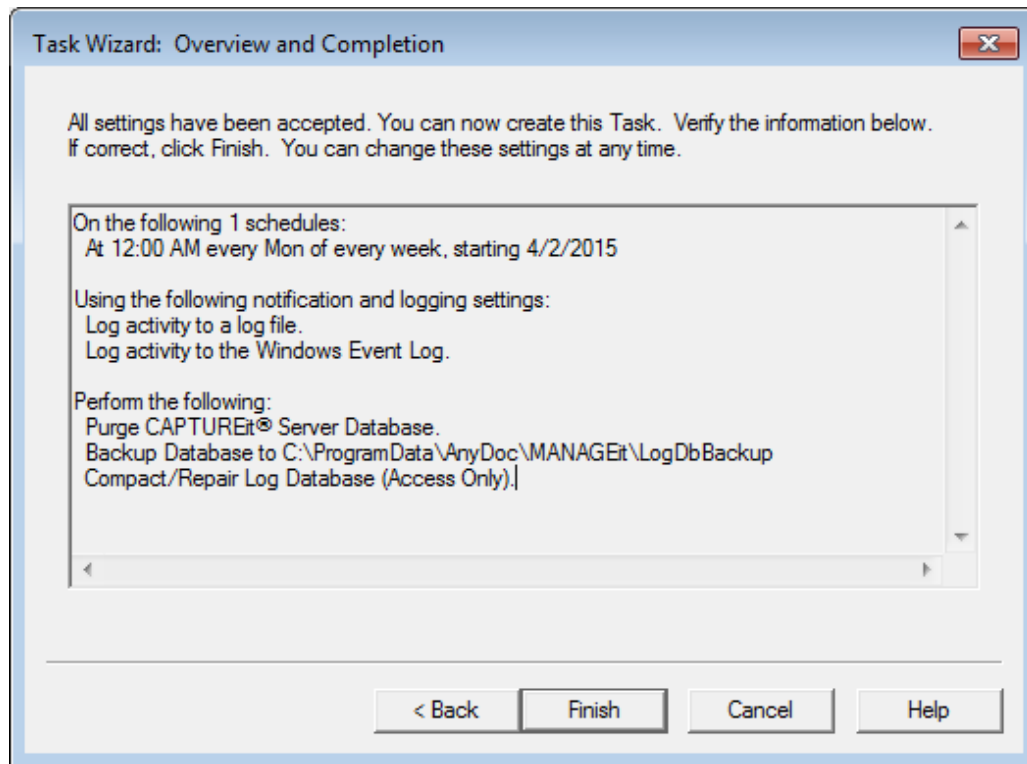
The **Task Wizard: AutoFlow** window is displayed.



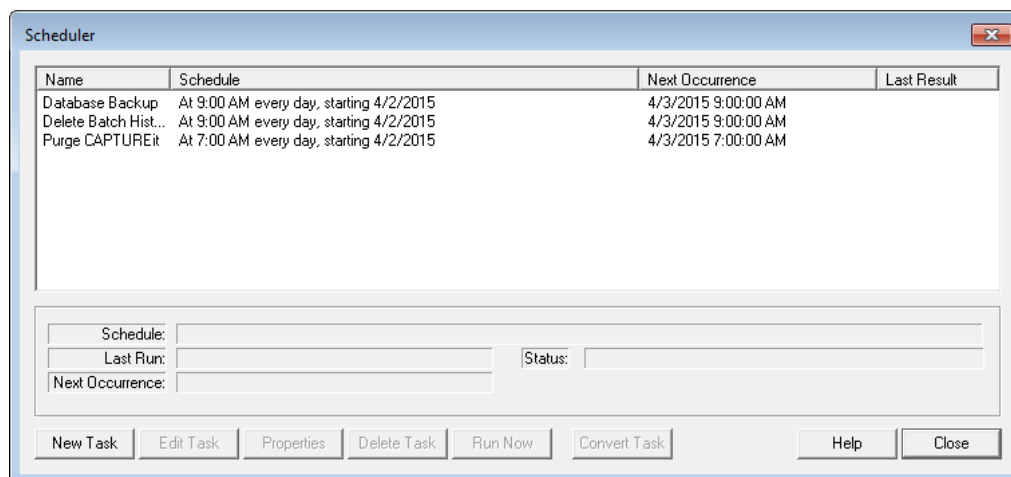
**32** Click **Next**.

## Task Scheduler

The **Task Wizard: Overview and Completion** window displays information concerning the task you have just scheduled.



- 33** Click **Back** to return to edit a selected task or click **Finish** to run the task on the configured schedule. The **Scheduler** window displays the configured tasks.






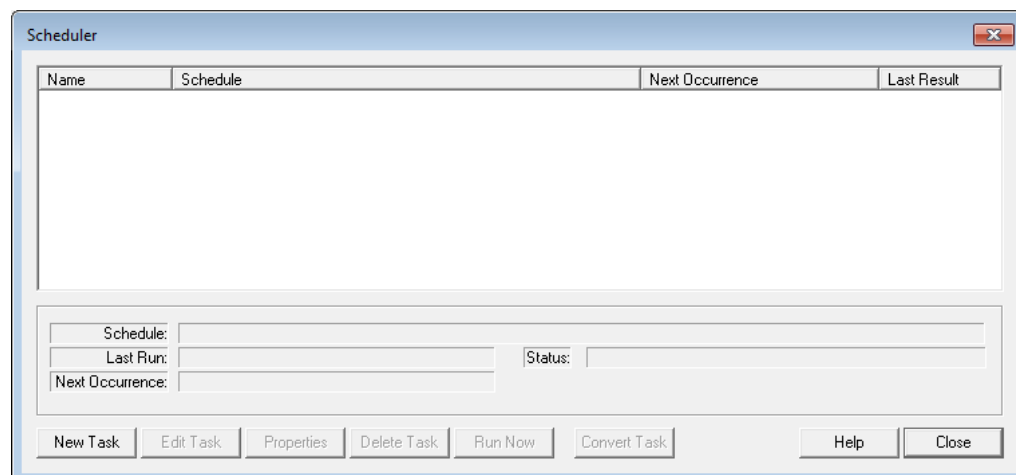
## AutoFlow Processing Pause

The Pause AutoFlow Processing action causes MANAGEit to wait the specified length of time before continuing AutoFlow on all stations. This action is useful when you have non-MANAGEit jobs scheduled to run (such as hard drive backups) and want to schedule AutoFlow to pause during the backup. You can schedule AutoFlow to pause using the Task Scheduler.

If MANAGEit pauses an OCR for AnyDoc station and a user attempts to start AutoFlow manually, then the station displays a warning message. This notification requires OCR for AnyDoc 5.0.5 or higher.

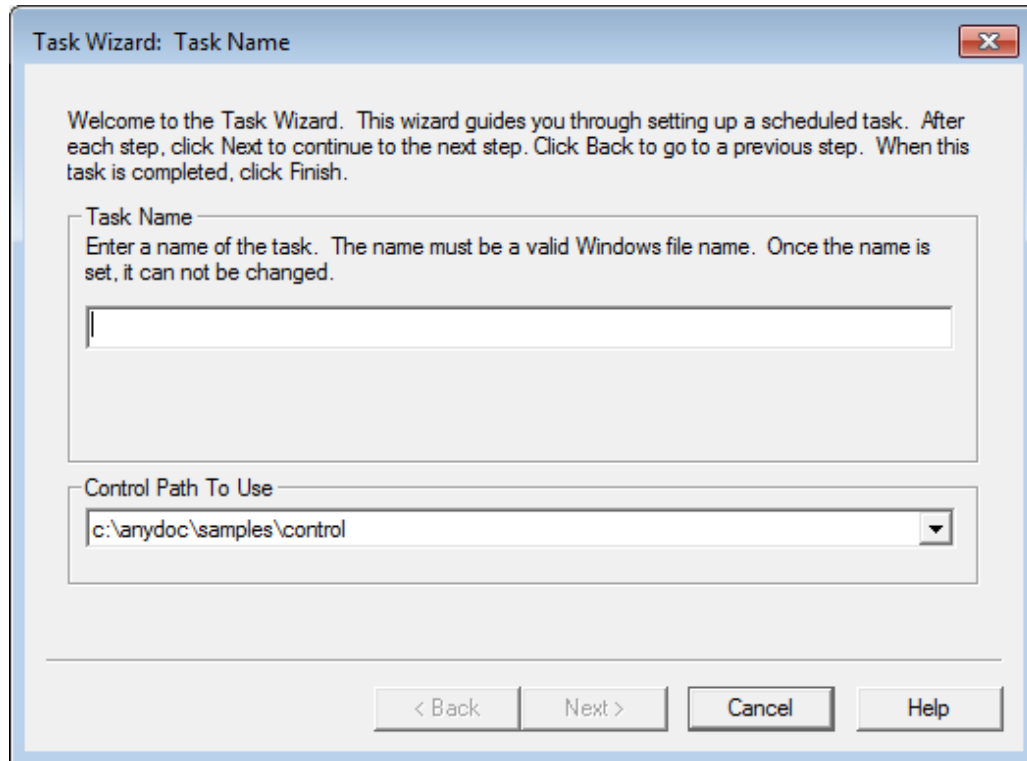
### Steps

- 1 Open the MANAGEit Task Scheduler by performing one of the following steps:
  - Select **Settings | MANAGEit Task Scheduler**.
  - Click the **MANAGEit Task Scheduler** button . The **Scheduler** window is displayed.



**Task Scheduler**

- 2 Click **New Task**. The **Task Wizard: Task Name** window is displayed.

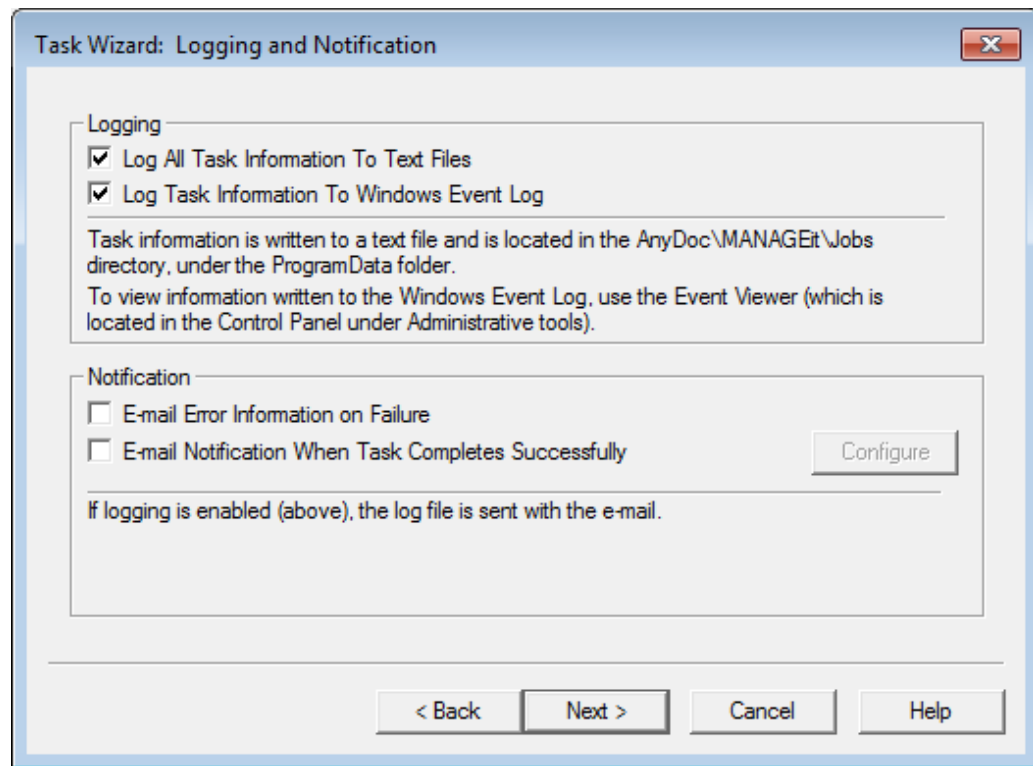


- 3 In the **Task Name** field, enter a name for the new task. This name must be a valid DOS long file name. After you enter a task name and go to the next page, the name cannot be changed. If you enter an invalid character, it appears in red and the station beeps as a warning.
- 4 Select a **Control Path To Use**. All control paths currently being monitored are listed.



Each task only applies to one control path. If multiple control paths are being monitored, you must schedule separate tasks for each control path.

- 5 Click **Next**. The **Task Wizard: Logging and Notification** window is displayed.



- 6 Select the **Log All Task Information To Text Files** check box to create text files with a trace of all steps taken by a task while performing its assigned actions. The log files are created in C:\ProgramData\AnyDoc\MANAGEit\Jobs and have the same name as the scheduled task.
- 7 Select the **Log Task Information To Windows Event Log** check box to create a record of a task's start and end in the Windows Event Log. Any errors occurring during processing are also recorded in the Windows Event Log. The Event Log is available from **Start | Control Panel | Administrative Tools | Event Viewer**. The Event Viewer allows you to see the start and end of MANAGEit tasks from other stations.
- 8 In the **Notification** area, select e-mail notification for one or both of the following:

- **E-Mail Error Information on Failure**
- **E-Mail Notification When Task Completes Successfully**

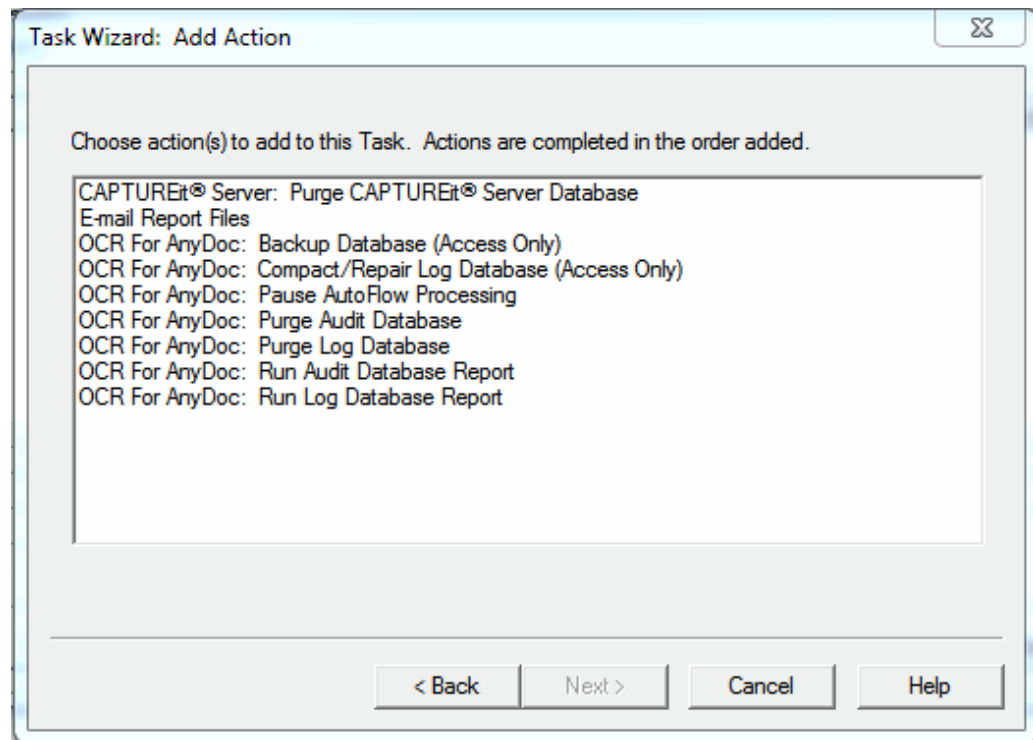
Selecting either of these e-mail notifications activates the **Configure** button. Click **Configure** to specify e-mail recipients. See E-mail Alert Notifications (page 97).



If either of the options in the Logging area are selected, the log file is sent with the e-mail notification.

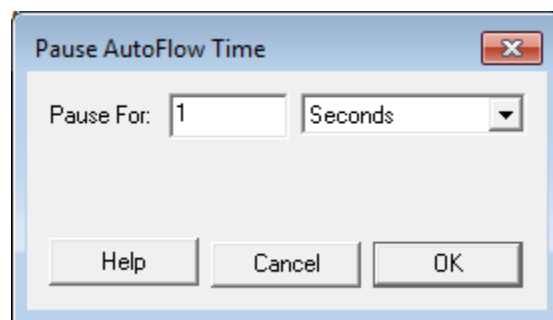
**Task Scheduler**

- 9 Click **Next**. The **Task Wizard: Add Action** window is displayed.



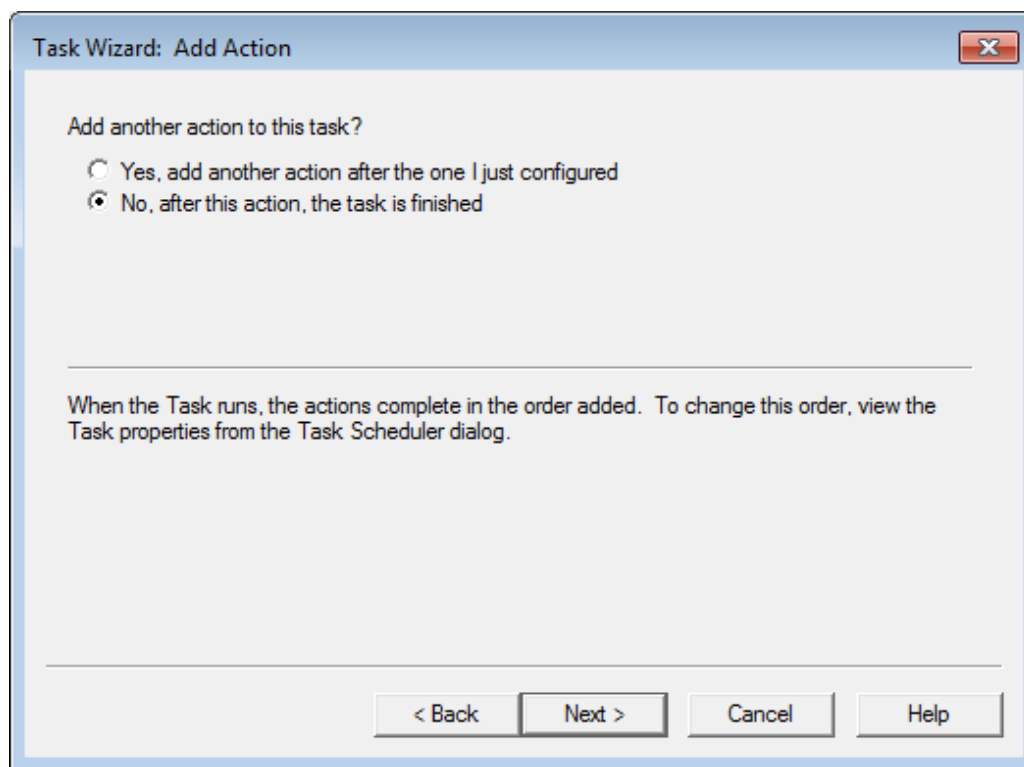
- 10 Select **Pause AutoFlow Processing** from the **Task Wizard: Add Action** window and click **Next**.

The **Pause AutoFlow Time** window is displayed.



- 11 In the **Pause For** field, enter a number and select a time increment to pause AutoFlow.
- 12 Click **OK**.

The **Task Wizard: Add Action** window is displayed.



- 13** Select **Yes** to add another action to the same task. Repeat previous steps until all actions have been added

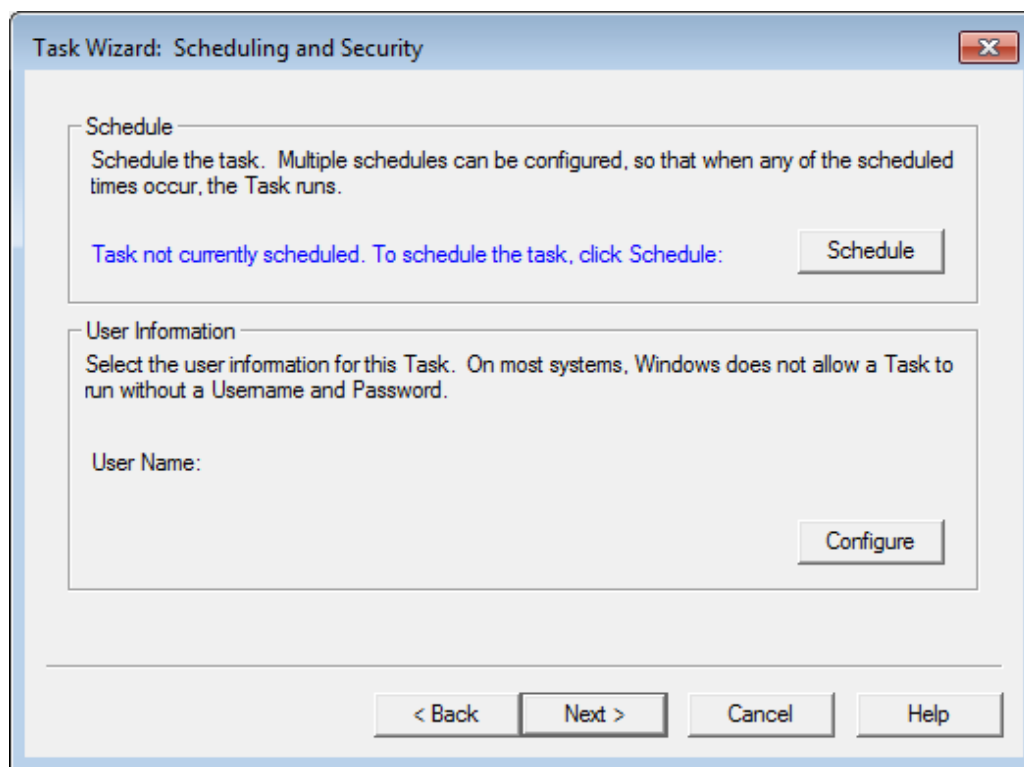
OR

Select **No** if you have finished adding actions.

- 14** Click **Next** to schedule the task and set appropriate security.

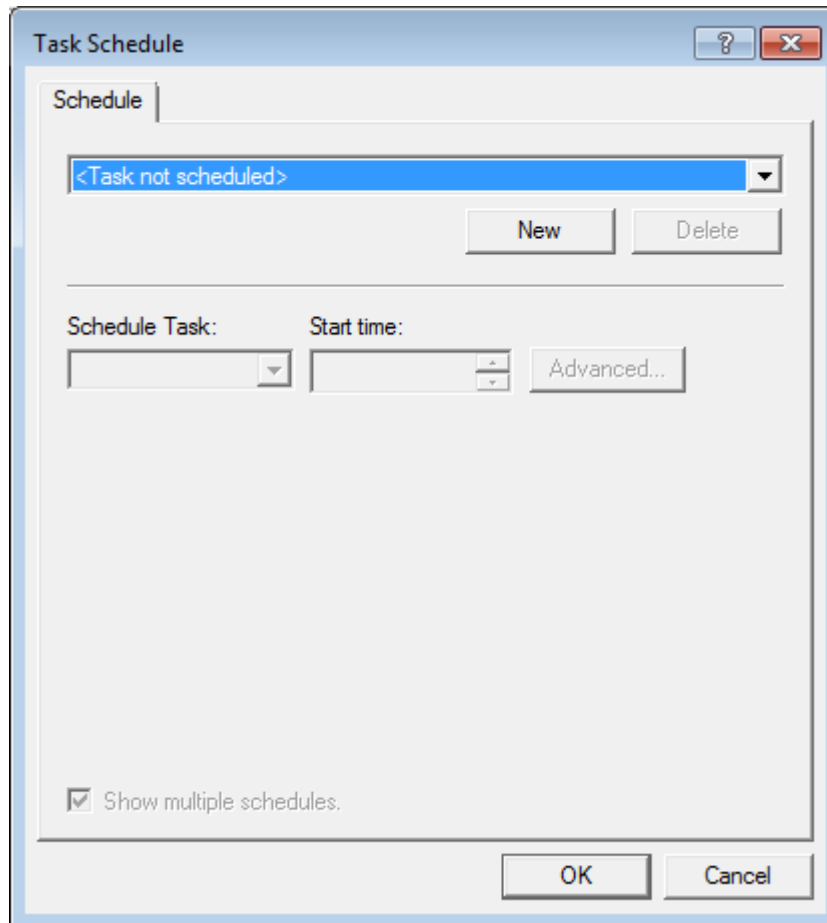
**Task Scheduler**

The **Task Wizard: Scheduling and Security** window is displayed.



**15** Click **Schedule**.

The **Task Schedule** window is displayed.



- 16 Click **New** to create a schedule for this task.

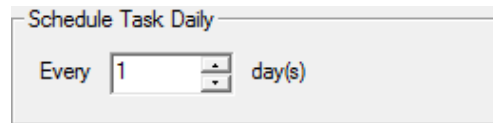
You can create multiple schedules for a single task. The **Schedule** tab reflects the new schedule that you are creating. Click the arrow for a list of schedules that have already been created for this task. This field only appears if **Show multiple schedules** is selected.

- 17 Select an option from the **Schedule Task** menu to select how frequently the task is performed.



It is strongly recommended that you do not schedule tasks to run At System Startup, At Logon, or When idle. These schedule items require user intervention.

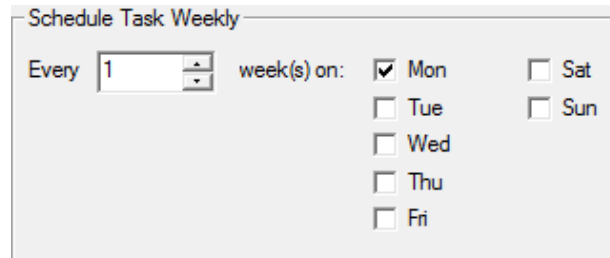
- 18 If **Daily**, **Weekly**, **Monthly**, or **Once** was selected from the **Schedule Task** menu, enter a **Start Time** for the task. Depending on the option selected from the **Schedule Task** menu the **Schedule Task** section offers different options.

**Task Scheduler**


Schedule Task Daily

Every  day(s)

Appears when Daily is chosen for the task frequency. Enter the frequency in days.

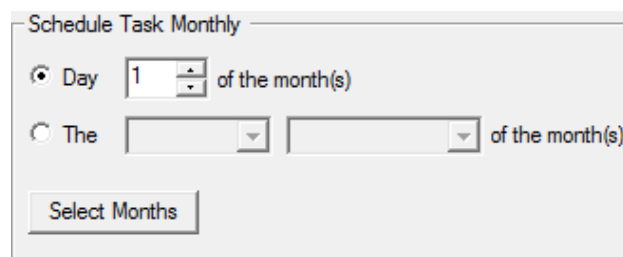


Schedule Task Weekly

Every  week(s) on:

<input checked="" type="checkbox"/> Mon	<input type="checkbox"/> Sat
<input type="checkbox"/> Tue	<input type="checkbox"/> Sun
<input type="checkbox"/> Wed	
<input type="checkbox"/> Thu	
<input type="checkbox"/> Fri	

Appears when Weekly is selected for the task frequency. Enter the frequency in weeks and select the day(s) of the week to run the task.

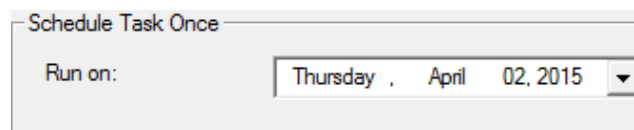


Schedule Task Monthly

☒ Day  of the month(s)

☐ The  of the month(s)

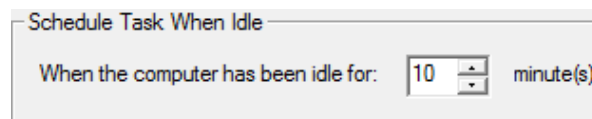
Appears when Monthly is chosen for the task frequency. Select either the Day of the month to run the task, or select The \_\_\_\_ of the month(s) and enter a week and day (e.g., the Third Friday of the month). Click Select Months to select specific month(s) to run the task.



Schedule Task Once

Run on:

Appears when Once is selected for the task frequency. Select the date to run the task.



Schedule Task When Idle

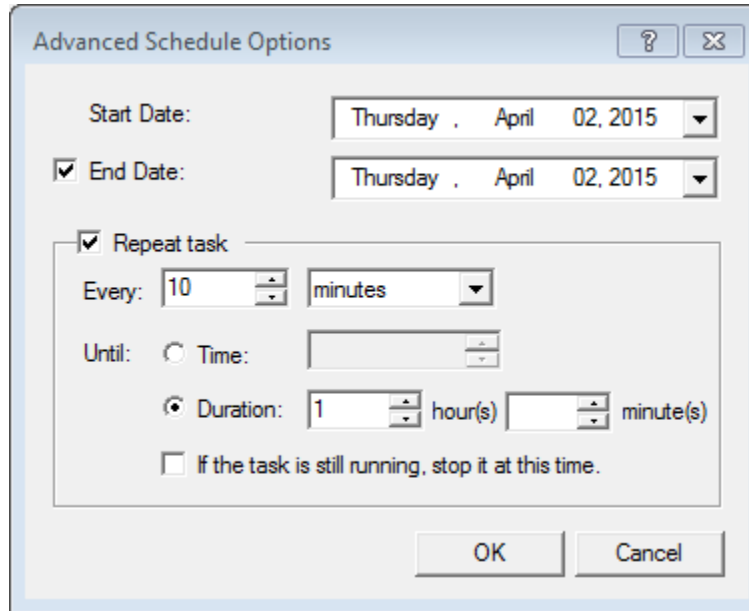
When the computer has been idle for:  minute(s)

Appears when When idle is selected for the task frequency. Enter the number of minutes that the station must be idle before running the task.

- 19** To set up more than one schedule for this task, enable the **Show multiple schedules** check box.



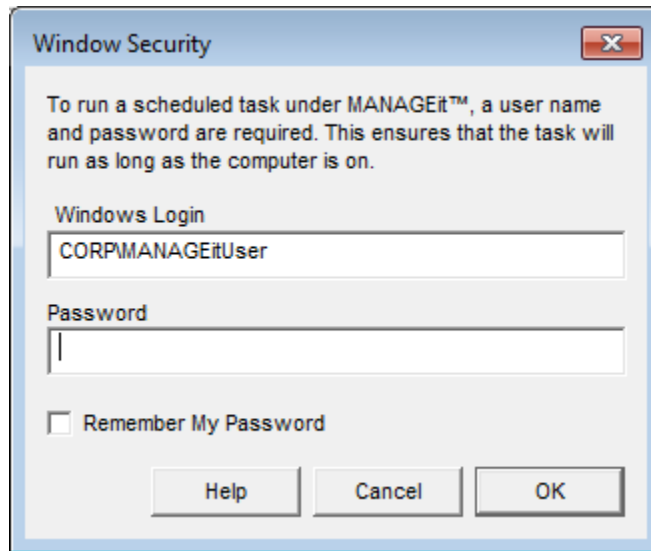
- 20 Click the **Advanced** button to access additional scheduling options.

The image shows a Windows-style dialog box titled "Advanced Schedule Options". It has a light blue title bar with a question mark icon and a close button (X). The dialog contains several fields and checkboxes. At the top, there is a "Start Date:" label followed by a date picker showing "Thursday , April 02, 2015". Below this is a checked checkbox labeled "End Date:" followed by another date picker showing "Thursday , April 02, 2015". Underneath is a checked checkbox labeled "Repeat task". Below the "Repeat task" checkbox is a section with "Every:" followed by a spinner box set to "10" and a dropdown menu set to "minutes". Below that is an "Until:" label with two radio buttons. The first radio button is labeled "Time:" and is currently unselected, with an empty time input field next to it. The second radio button is labeled "Duration:" and is selected, followed by a spinner box set to "1", a label "hour(s)", another spinner box, and a label "minute(s)". At the bottom of this section is an unchecked checkbox labeled "If the task is still running, stop it at this time.". At the very bottom of the dialog are "OK" and "Cancel" buttons.

- 21 Enter the **Start Date** or use the arrow to select the date from a calendar.
- 22 Select the **End Date** check box and enter the date to stop running the task or use the arrow to select the date from a calendar, if needed.
- 23 Select the **Repeat Task** check box to configure how often to repeat the task. Choose to repeat it every selected number of minutes or hours, until a selected time, or for a selected number of minutes/hours. You can also select to stop the task by selecting the If the task is still running, stop it at this time check box.
- 24 Click **OK** in the Advanced Schedule Options window, then click **OK** in the Task Schedule window. The Task Wizard: Scheduling and Security window reappears.

**Task Scheduler**

- 25 Click **Configure** to set a user name and password to run the task(s). The Window Security window appears.



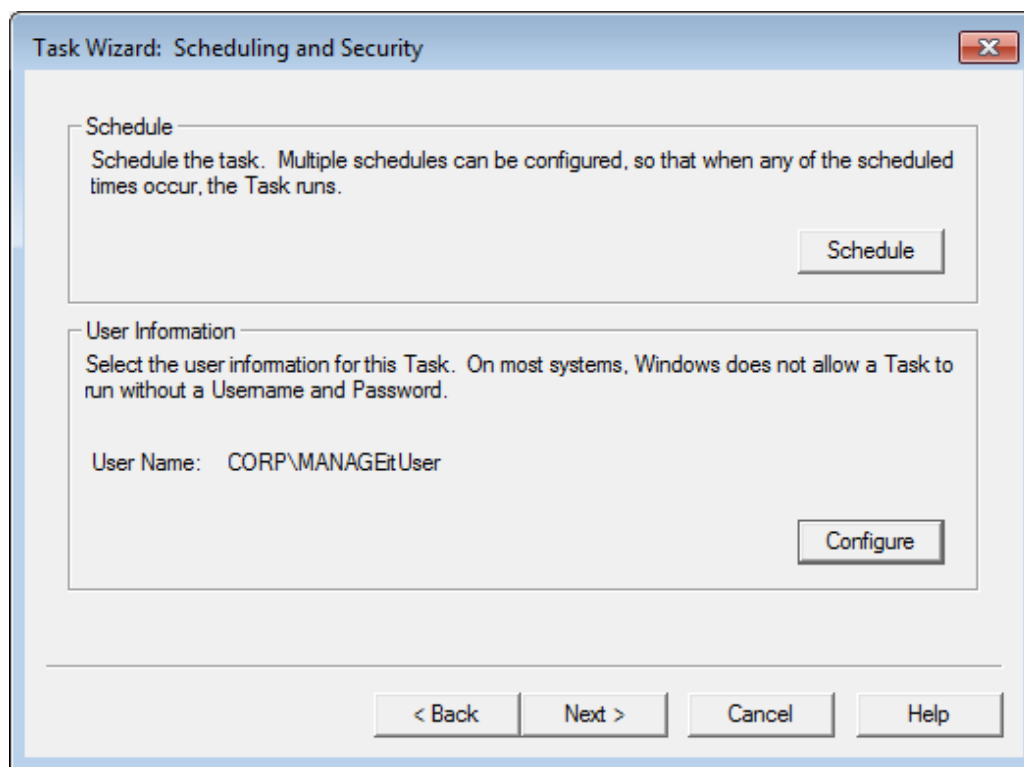
- 26 Enter a user name and password. The user identified must have access to all drives used by OCR for AnyDoc (such as the Control directory).



If you are using a networked path and a domain name is required, it must be entered with the user name for the task to run. Check with your System Administrator to determine if your network settings require a domain name.

- 27 Select the **Remember My Password** check box to carry out the task without running MANAGEit. Selecting this check box also avoids being prompted every time you update the task.
- 28 Click **OK** when finished.

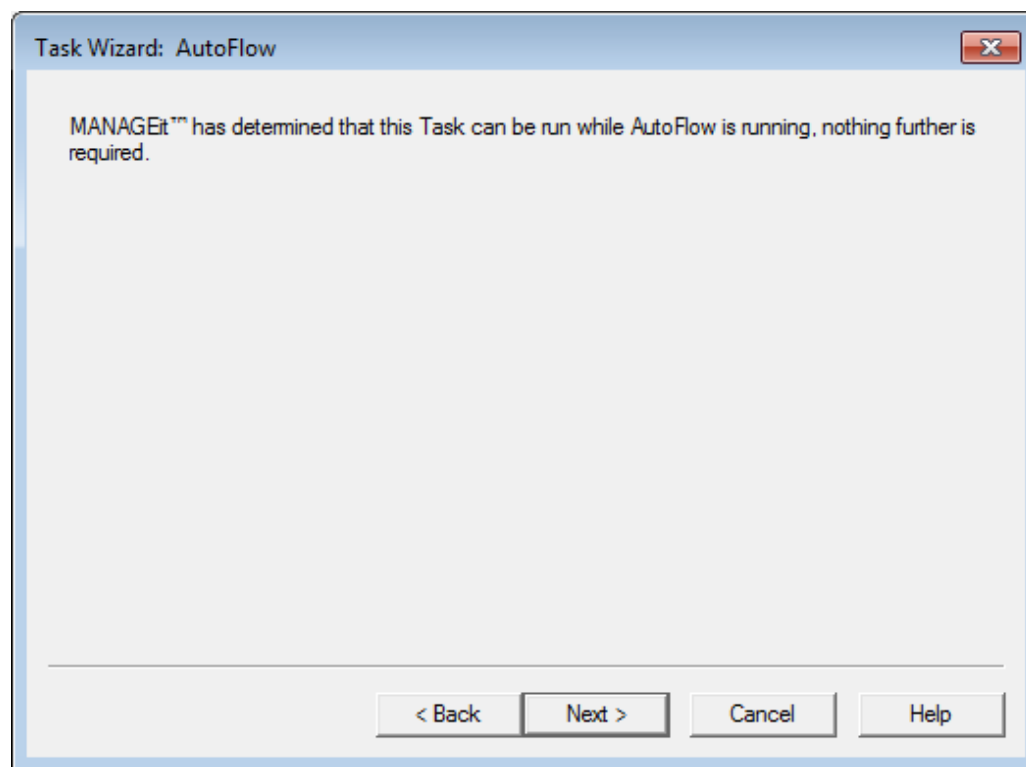
The **Scheduling and Security** window displays the configured user name.



**29** Click **Next**.

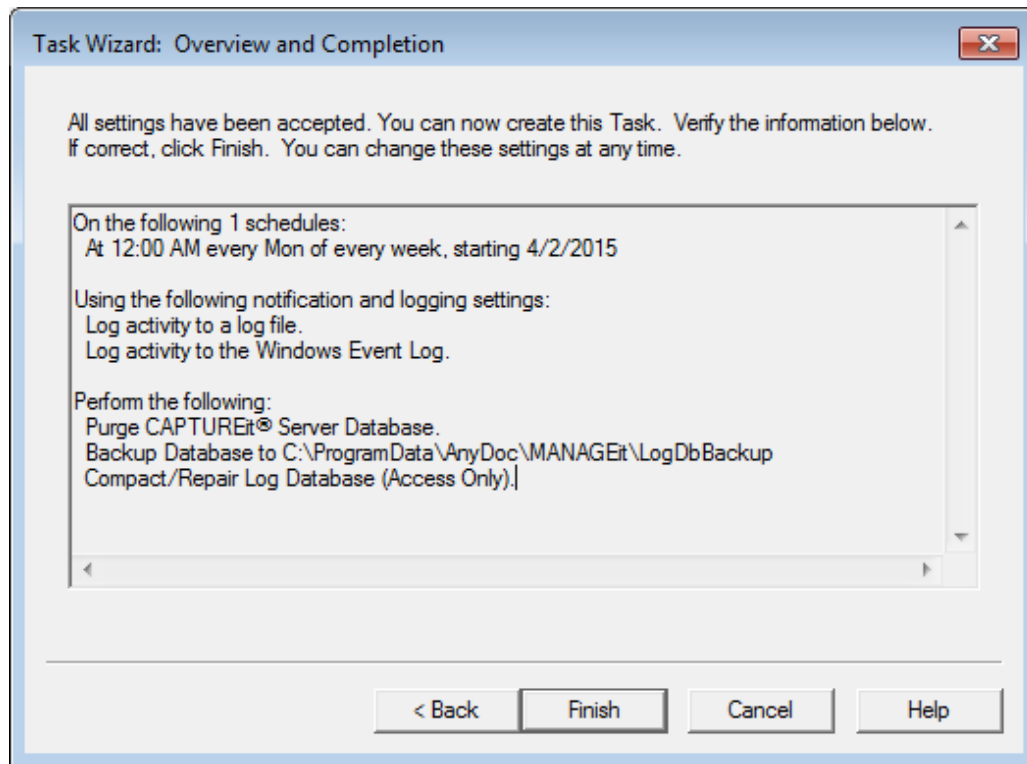
**Task Scheduler**

The **Task Wizard: AutoFlow** window is displayed.

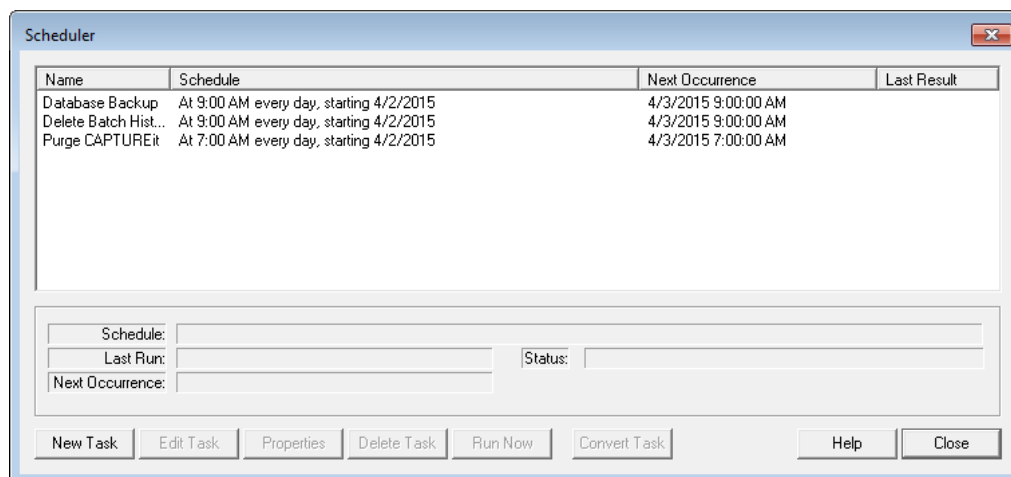


**30** Click **Next**.

The **Task Wizard: Overview and Completion** window displays information concerning the task you have just scheduled.



- 31 Click **Back** to return to edit a selected task or click **Finish** to run the task on the configured schedule. The **Scheduler** window displays the configured tasks.




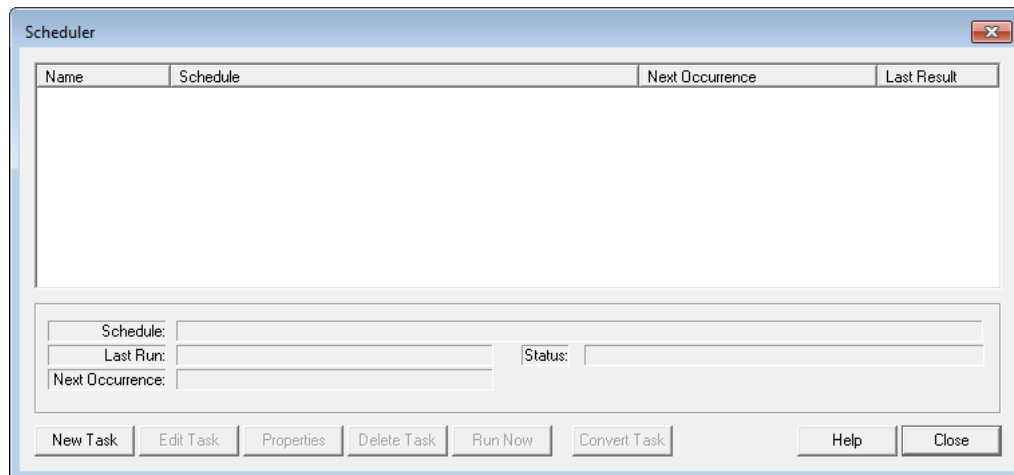
**Task Scheduler**

## Log Database Reports

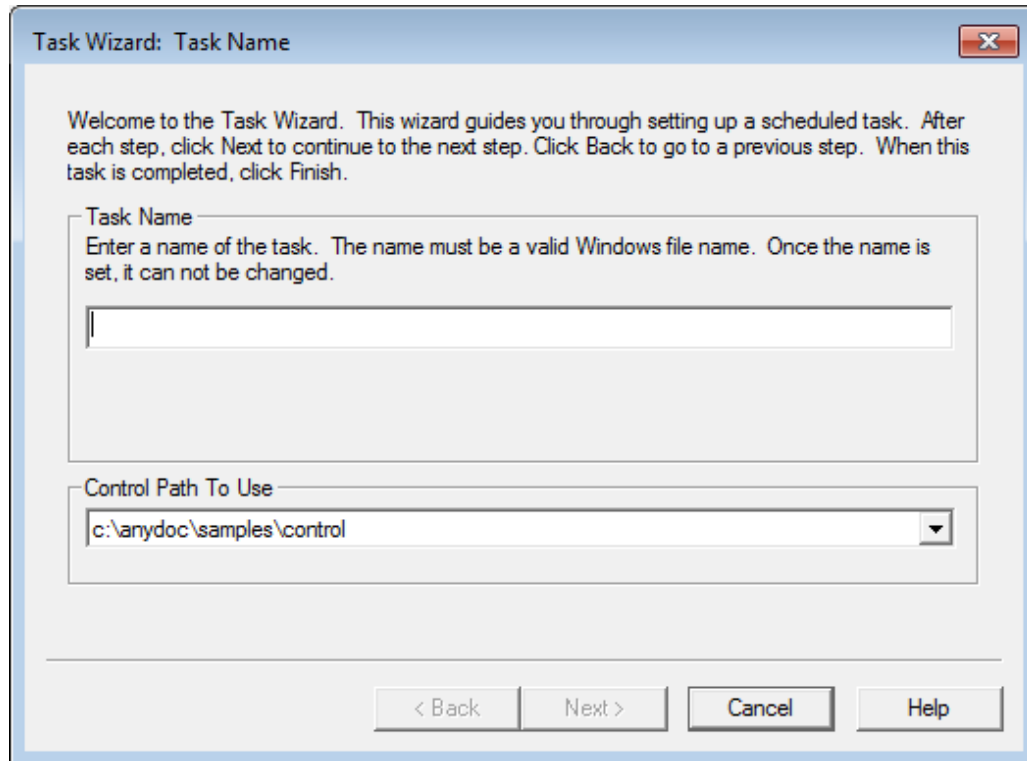
Log database reports can be scheduled to run at specified time(s) using the Task Scheduler. The procedure is the same whether you are scheduling reports from the version 4.0 log database or from the prior version log database.

### Steps

- 1 Open the MANAGEit Task Scheduler by performing one of the following steps:
  - Select **Settings | MANAGEit Task Scheduler**.
  - Click the **MANAGEit Task Scheduler** button . The **Scheduler** window is displayed.



- 2 Click **New Task**. The **Task Wizard: Task Name** window is displayed.



The image shows a Windows-style dialog box titled "Task Wizard: Task Name". It has a standard Windows window frame with a title bar and a close button (X) in the top right corner. The dialog contains the following elements:

- Task Name**: A section with a label and a text box. The text above the box says: "Enter a name of the task. The name must be a valid Windows file name. Once the name is set, it can not be changed." The text box is empty.
- Control Path To Use**: A section with a label and a dropdown menu. The dropdown menu currently shows "c:\anydoc\samples\control".
- Buttons**: At the bottom of the dialog, there are four buttons: "< Back", "Next >", "Cancel", and "Help".

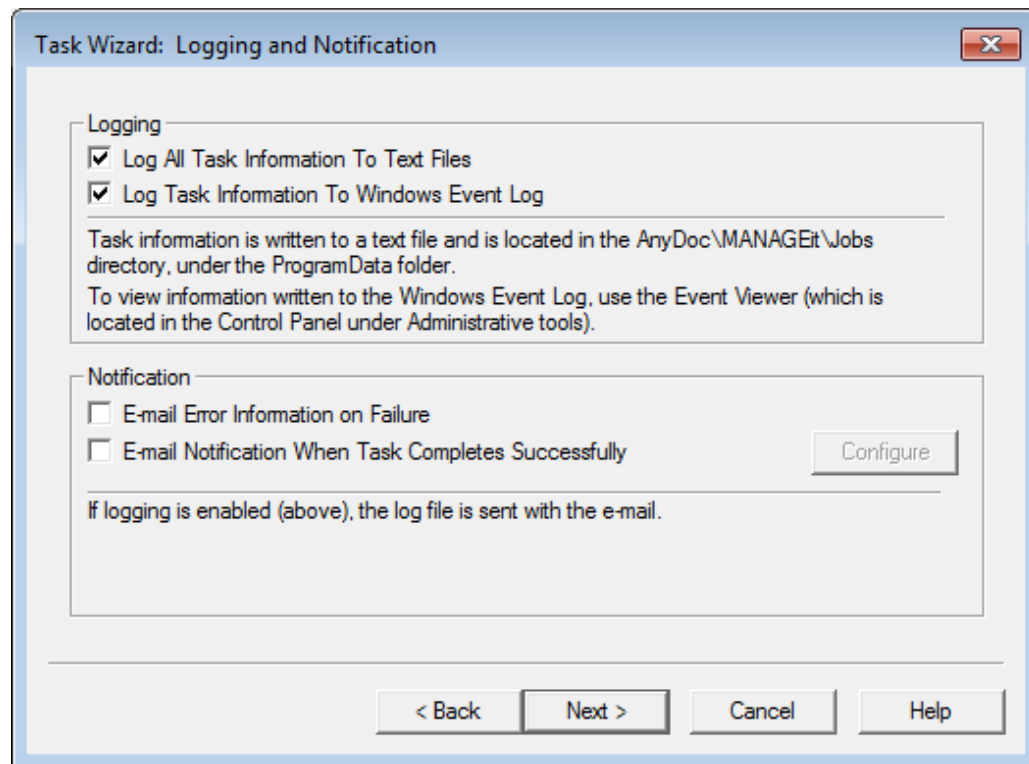
- 3 In the **Task Name** field, enter a name for the new task. This name must be a valid DOS long file name. After you enter a task name and go to the next page, the name cannot be changed. If you enter an invalid character, it appears in red and the station beeps as a warning.
- 4 Select a **Control Path To Use**. All control paths currently being monitored are listed.



Each task only applies to one control path. If multiple control paths are being monitored, you must schedule separate tasks for each control path.

**Task Scheduler**

- 5 Click **Next**. The **Task Wizard: Logging and Notification** window is displayed.



- 6 Select the **Log All Task Information To Text Files** check box to create text files with a trace of all steps taken by a task while performing its assigned actions. The log files are created in C:\ProgramData\AnyDoc\MANAGEit\Jobs and have the same name as the scheduled task.
- 7 Select the **Log Task Information To Windows Event Log** check box to create a record of a task's start and end in the Windows Event Log. Any errors occurring during processing are also recorded in the Windows Event Log. The Event Log is available from **Start | Control Panel | Administrative Tools | Event Viewer**. The Event Viewer allows you to see the start and end of MANAGEit tasks from other stations.
- 8 In the **Notification** area, select e-mail notification for one or both of the following:

- **E-Mail Error Information on Failure**
- **E-Mail Notification When Task Completes Successfully**

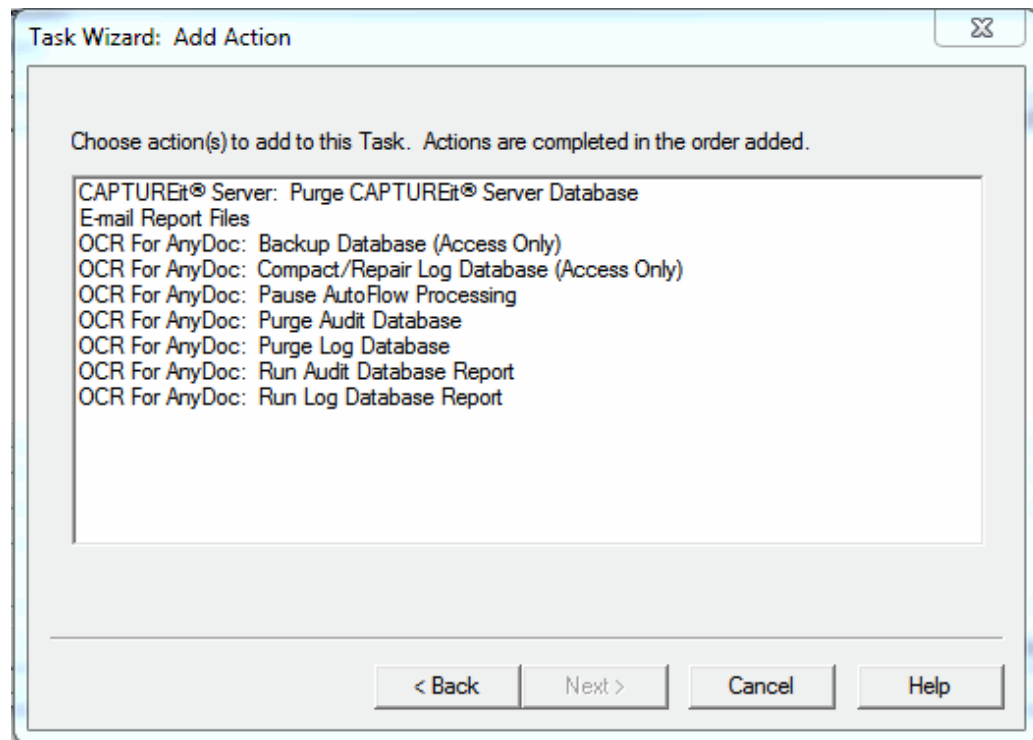
Selecting either of these e-mail notifications activates the **Configure** button. Click **Configure** to specify e-mail recipients. See E-mail Alert Notifications (page 97).



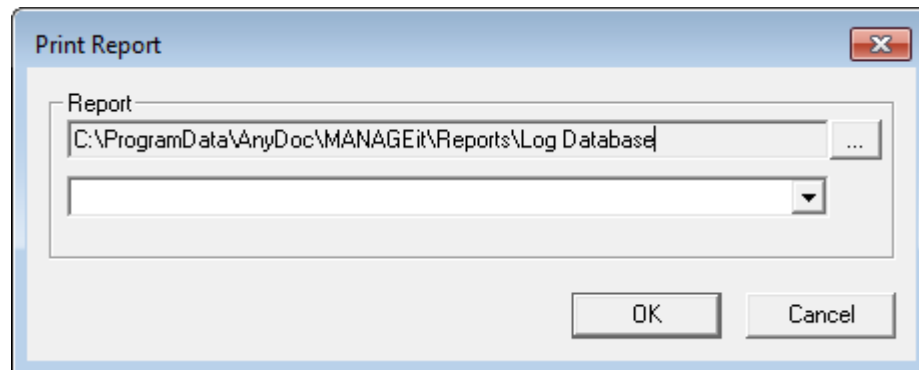
If either of the options in the Logging area are selected, the log file is sent with the e-mail notification.



- 9 Click **Next**. The **Task Wizard: Add Action** window is displayed.

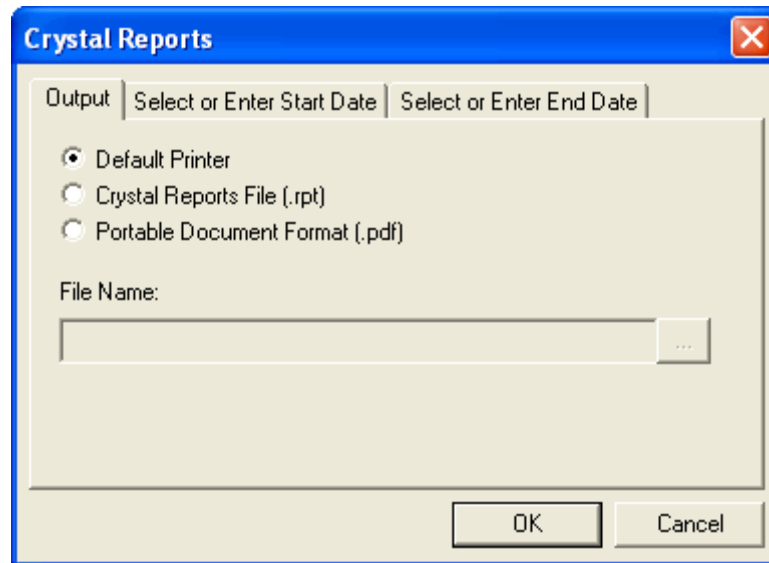



- 10 Select **OCR for Anydoc: Run Log Database Report** from the Task Wizard: Add Action window and click **Next**. The Print Report window is displayed.

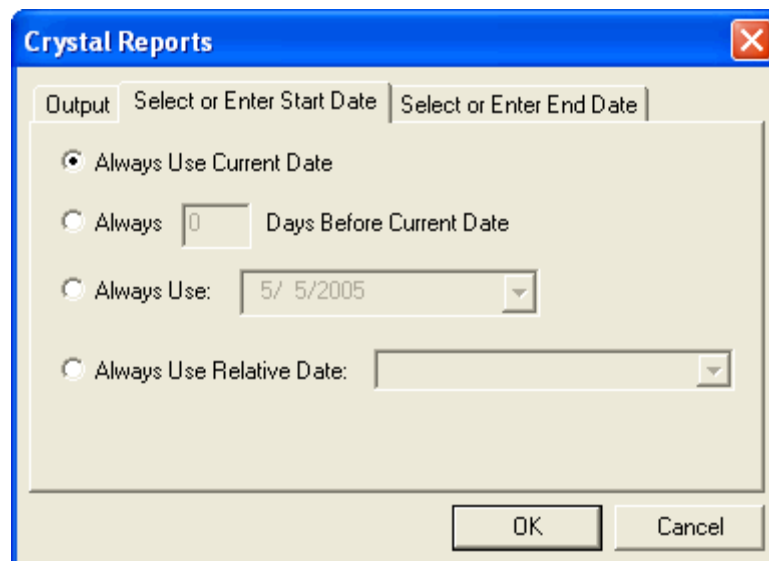


**Task Scheduler**

- 11 Select a report from the drop down list and click **OK**. The Crystal Reports window is displayed.

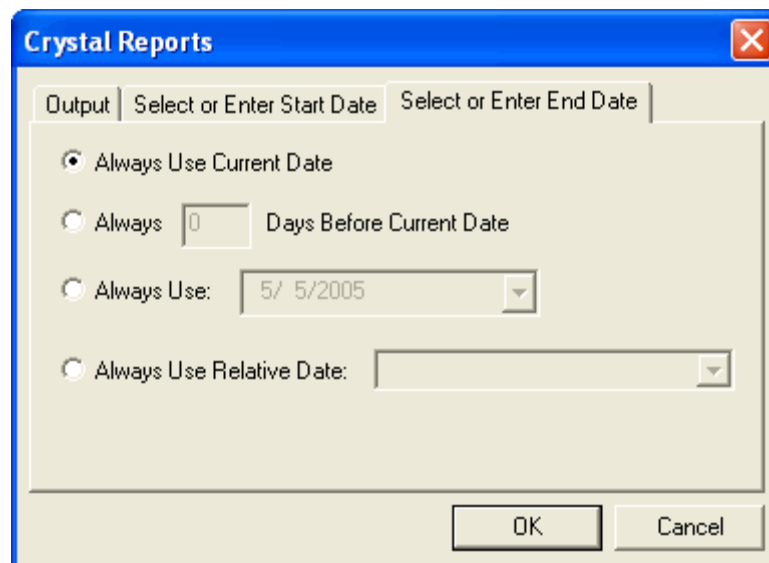


- 12 Enable an output destination radio button for the report.
- 13 If the Crystal Reports File (.rpt) or Portable Document Format (.pdf) radio button is enabled, enter a **File Name** for the report file, or click  to browse to a location.
- 14 Click the **Select or Enter Start Date** tab to configure the beginning date of the report.



- 15 Enable a radio button to specify when the report should begin running. Options include:

- **Always Use Current Date:** Use the day the report is generated as the beginning date.
  - **Always \_\_ Days Before Current Date:** Make the beginning date for the report the specified number of days before the day the report is generated.
  - **Always Use:** Enter a static beginning date for the report or select a date from a calendar. The same beginning date is used each time the report is generated.
  - **Always Use Relative Date:** Use the same date in relation to the current day each time the report is generated.
- 16 Click the **Select or Enter End Date** tab to configure the end date of the report. The choices for the report end date are the same as for the begin date.

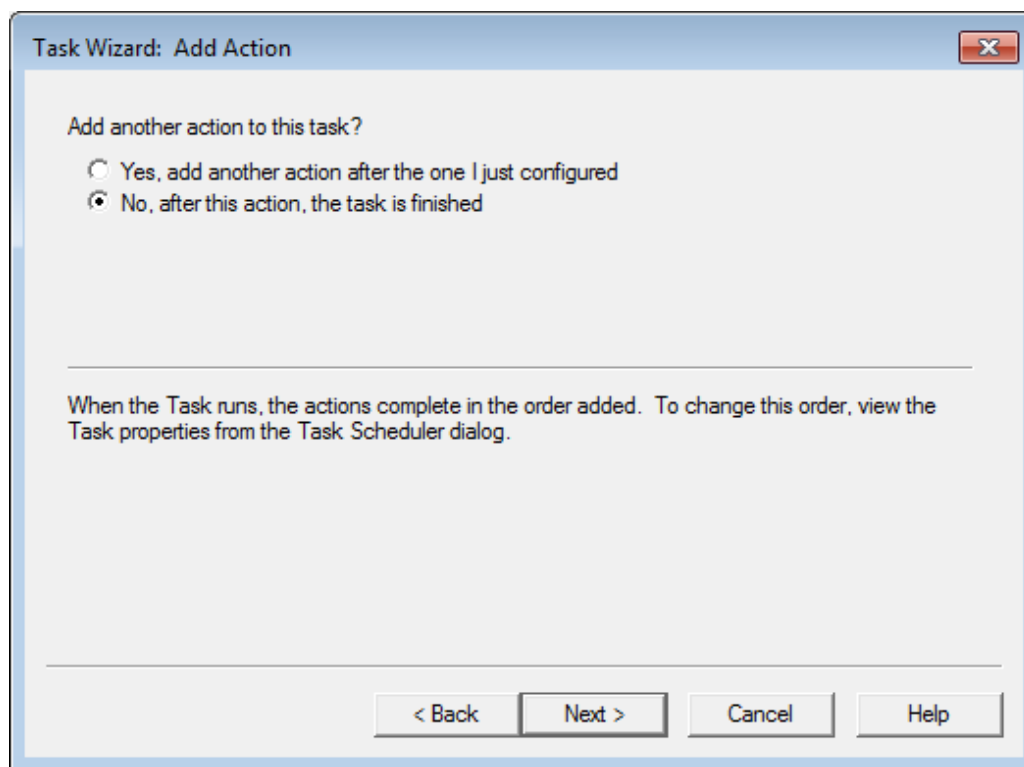


The image shows a 'Crystal Reports' dialog box with a blue title bar and a close button (X) in the top right corner. The dialog has three tabs: 'Output', 'Select or Enter Start Date', and 'Select or Enter End Date'. The 'Select or Enter End Date' tab is currently selected. Inside the dialog, there are four radio button options for selecting the end date: 'Always Use Current Date' (which is selected), 'Always [0] Days Before Current Date', 'Always Use: [5/ 5/2005]' (with a dropdown arrow), and 'Always Use Relative Date: [ ]' (with a dropdown arrow). At the bottom of the dialog are 'OK' and 'Cancel' buttons.

- 17 Click **OK**.

**Task Scheduler**

The **Task Wizard: Add Action** window is displayed.



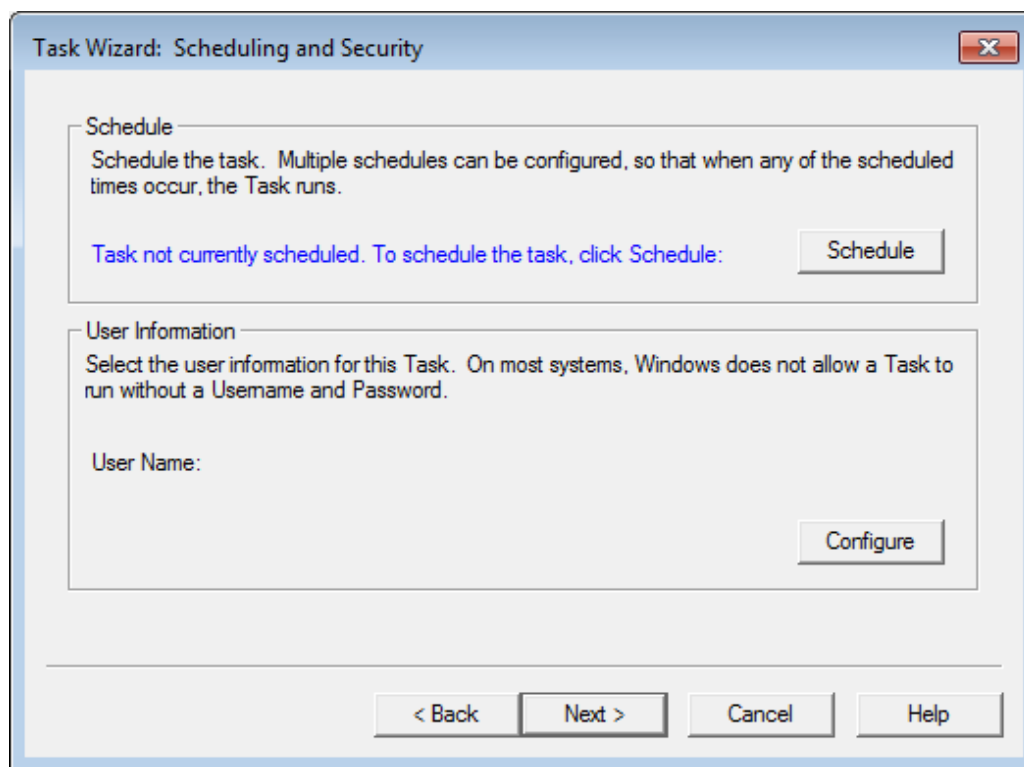
- 18** Select **Yes** to add another action to the same task. Repeat previous steps until all actions have been added

OR

Select **No** if you have finished adding actions.

- 19** Click **Next** to schedule the task and set appropriate security.

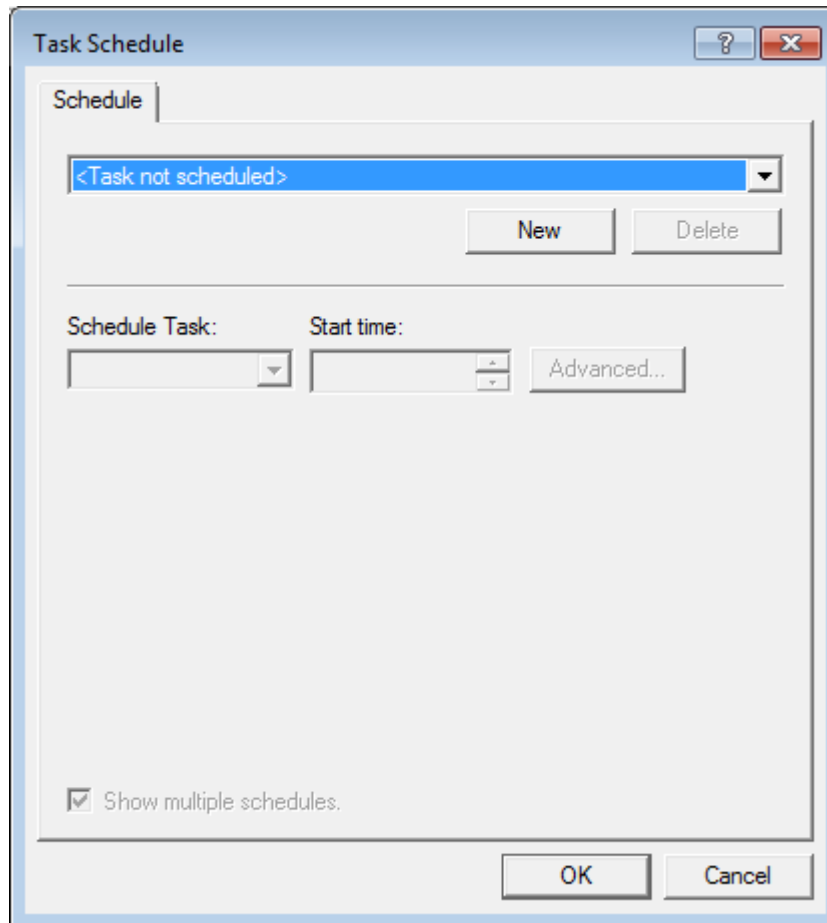
The **Task Wizard: Scheduling and Security** window is displayed.



**20** Click **Schedule**.

**Task Scheduler**

The **Task Schedule** window is displayed.



- 21 Click **New** to create a schedule for this task.

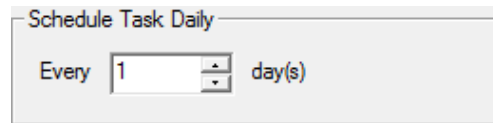
You can create multiple schedules for a single task. The **Schedule** tab reflects the new schedule that you are creating. Click the arrow for a list of schedules that have already been created for this task. This field only appears if **Show multiple schedules** is selected.

- 22 Select an option from the **Schedule Task** menu to select how frequently the task is performed.



It is strongly recommended that you do not schedule tasks to run At System Startup, At Logon, or When idle. These schedule items require user intervention.

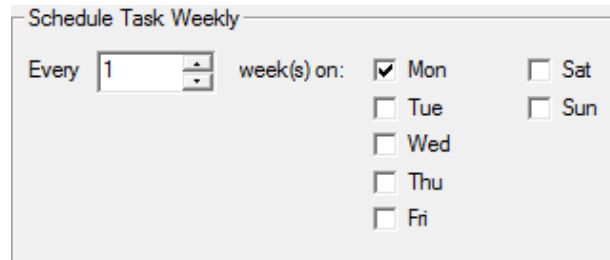
- 23 If **Daily**, **Weekly**, **Monthly**, or **Once** was selected from the **Schedule Task** menu, enter a **Start Time** for the task. Depending on the option selected from the **Schedule Task** menu the **Schedule Task** section offers different options.



Schedule Task Daily

Every  day(s)

Appears when Daily is chosen for the task frequency. Enter the frequency in days.

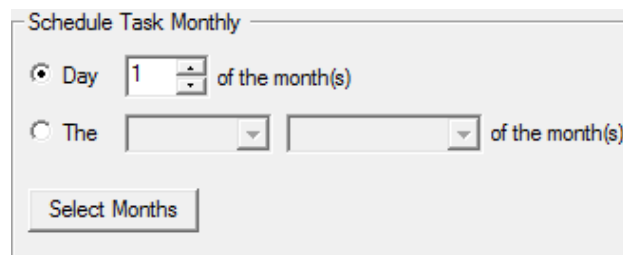


Schedule Task Weekly

Every  week(s) on:

<input checked="" type="checkbox"/> Mon	<input type="checkbox"/> Sat
<input type="checkbox"/> Tue	<input type="checkbox"/> Sun
<input type="checkbox"/> Wed	
<input type="checkbox"/> Thu	
<input type="checkbox"/> Fri	

Appears when Weekly is selected for the task frequency. Enter the frequency in weeks and select the day(s) of the week to run the task.

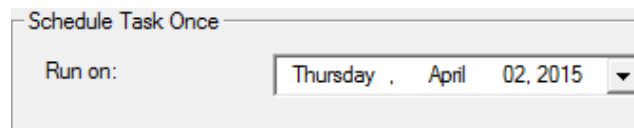


Schedule Task Monthly

☒ Day  of the month(s)

☐ The  of the month(s)

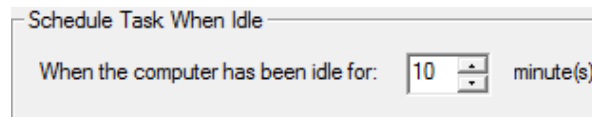
Appears when Monthly is chosen for the task frequency. Select either the Day of the month to run the task, or select The \_\_\_\_ of the month(s) and enter a week and day (e.g., the Third Friday of the month). Click Select Months to select specific month(s) to run the task.



Schedule Task Once

Run on:

Appears when Once is selected for the task frequency. Select the date to run the task.



Schedule Task When Idle

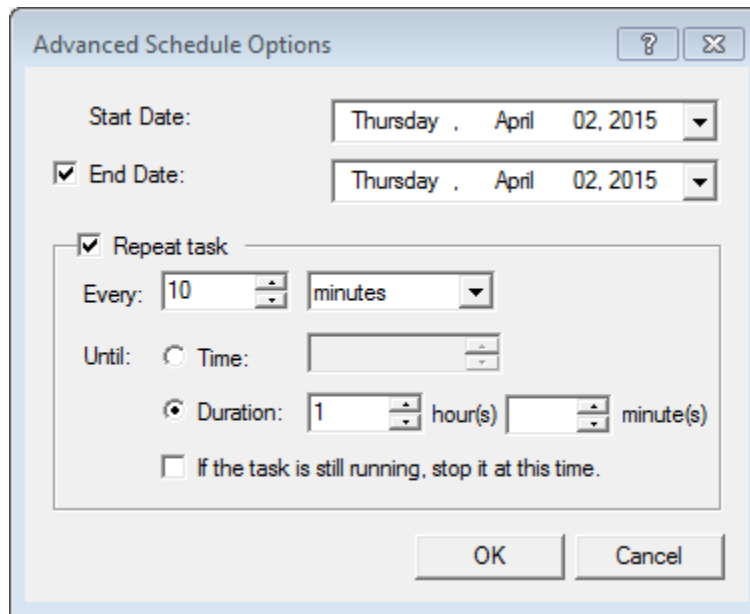
When the computer has been idle for:  minute(s)

Appears when When idle is selected for the task frequency. Enter the number of minutes that the station must be idle before running the task.

- 24 To set up more than one schedule for this task, enable the **Show multiple schedules** check box.

**Task Scheduler**

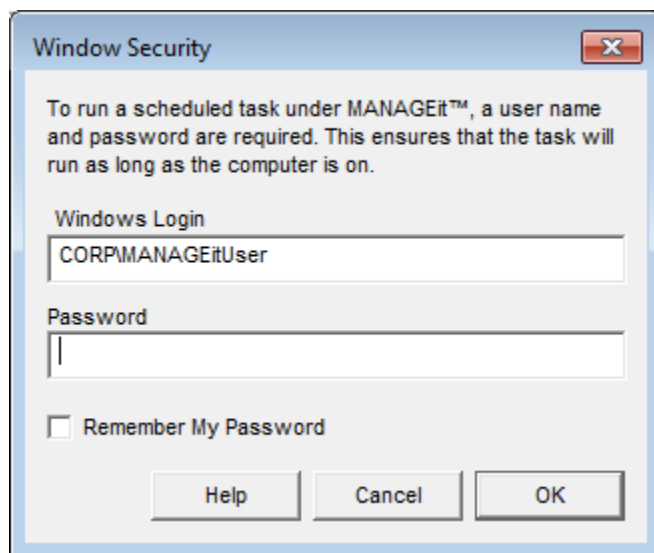
- 25 Click the **Advanced** button to access additional scheduling options.

The image shows a Windows-style dialog box titled "Advanced Schedule Options". It has a light blue title bar with a question mark icon and a close button (X). The dialog contains several fields and checkboxes. At the top, there is a "Start Date:" label followed by a date picker showing "Thursday , April 02, 2015". Below this is a checked checkbox for "End Date:" followed by another date picker showing "Thursday , April 02, 2015". Further down is a checked checkbox for "Repeat task". Below this checkbox is a section for repeating the task. It includes an "Every:" label with a spinner box set to "10" and a dropdown menu set to "minutes". Below that is an "Until:" label with two radio buttons: "Time:" (unselected) and "Duration:" (selected). The "Duration:" option has a spinner box set to "1" followed by "hour(s)" and another spinner box followed by "minute(s)". At the bottom of this section is an unchecked checkbox labeled "If the task is still running, stop it at this time.". At the very bottom of the dialog are "OK" and "Cancel" buttons.

- 26 Enter the **Start Date** or use the arrow to select the date from a calendar.
- 27 Select the **End Date** check box and enter the date to stop running the task or use the arrow to select the date from a calendar, if needed.
- 28 Select the **Repeat Task** check box to configure how often to repeat the task. Choose to repeat it every selected number of minutes or hours, until a selected time, or for a selected number of minutes/hours. You can also select to stop the task by selecting the If the task is still running, stop it at this time check box.
- 29 Click **OK** in the Advanced Schedule Options window, then click **OK** in the Task Schedule window. The Task Wizard: Scheduling and Security window reappears.



- 30 Click **Configure** to set a user name and password to run the task(s). The Window Security window appears.



- 31 Enter a user name and password. The user identified must have access to all drives used by OCR for AnyDoc (such as the Control directory).

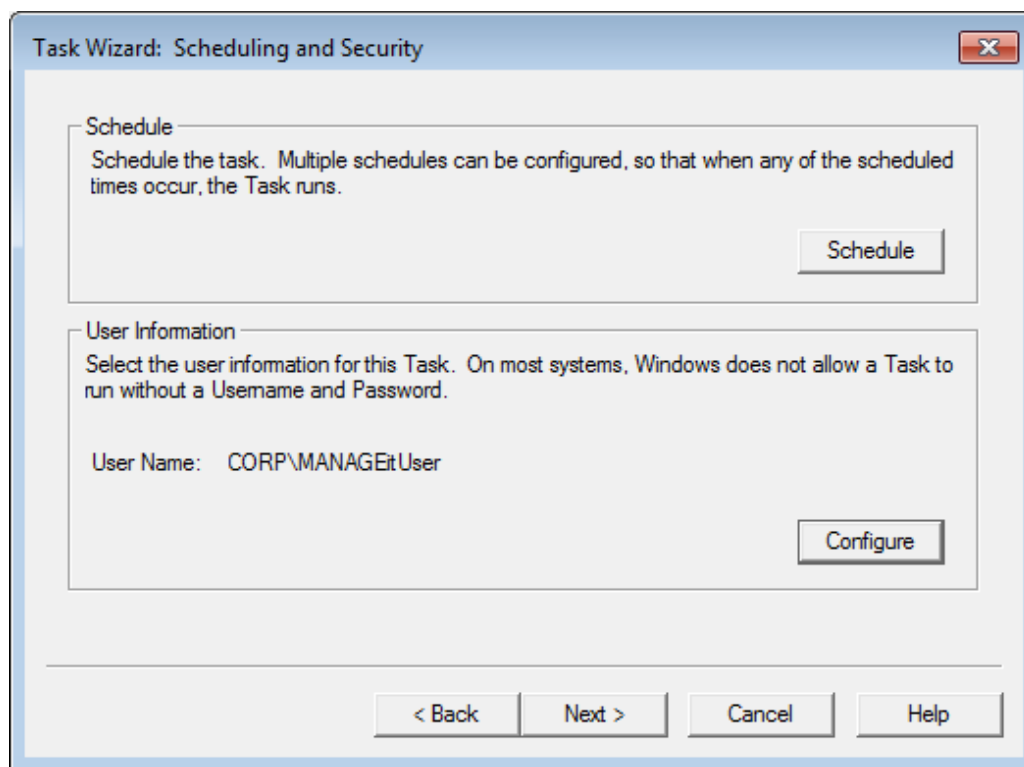


If you are using a networked path and a domain name is required, it must be entered with the user name for the task to run. Check with your System Administrator to determine if your network settings require a domain name.

- 32 Select the **Remember My Password** check box to carry out the task without running MANAGEit. Selecting this check box also avoids being prompted every time you update the task.
- 33 Click **OK** when finished.

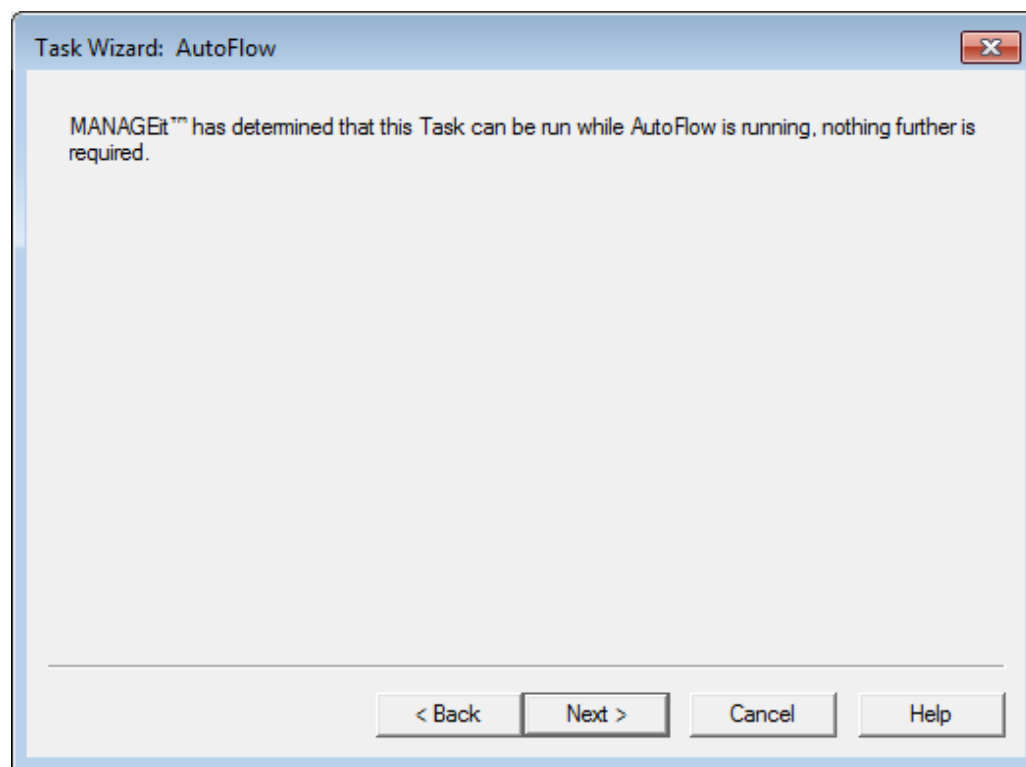
**Task Scheduler**

The **Scheduling and Security** window displays the configured user name.



**34** Click **Next**.

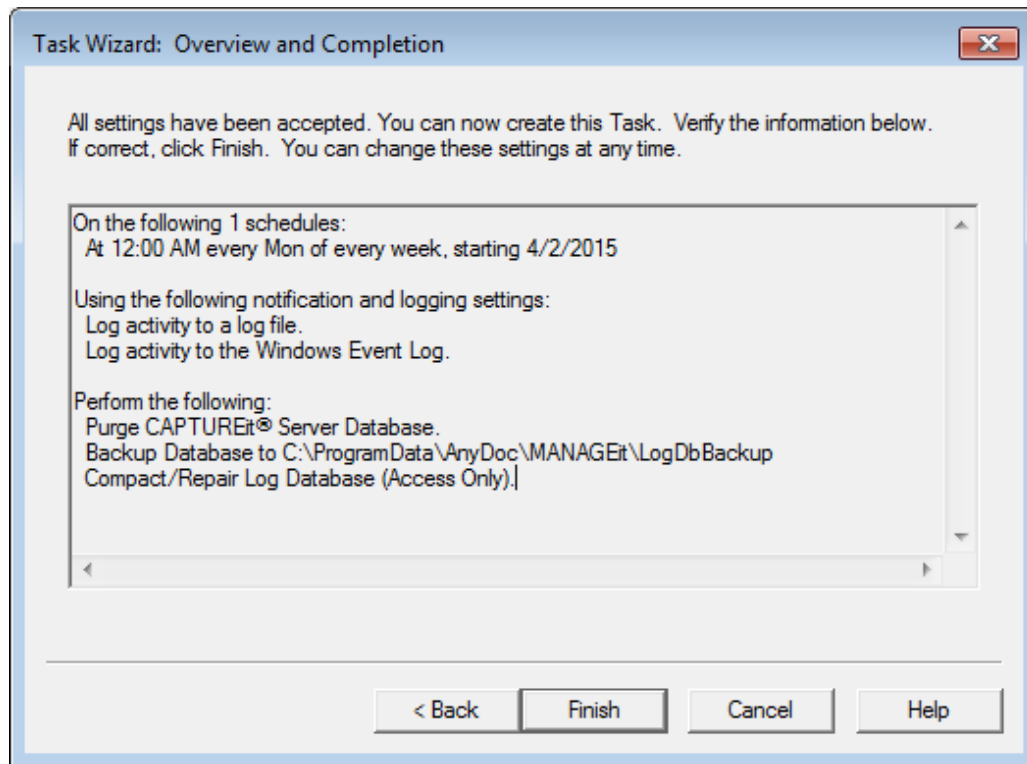
The **Task Wizard: AutoFlow** window is displayed.



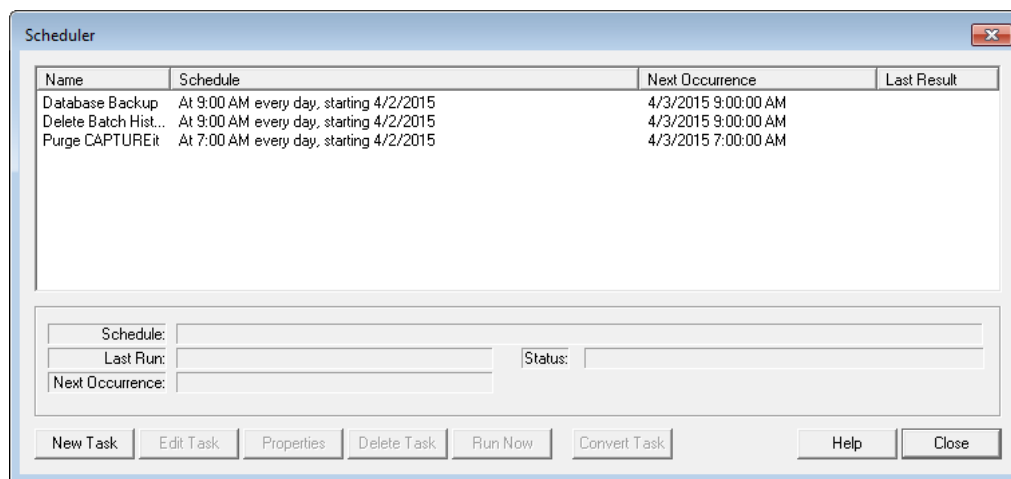
**35** Click **Next**.

## Task Scheduler

The **Task Wizard: Overview and Completion** window displays information concerning the task you have just scheduled.




- 36** Click **Back** to return to edit a selected task or click **Finish** to run the task on the configured schedule. The **Scheduler** window displays the configured tasks.

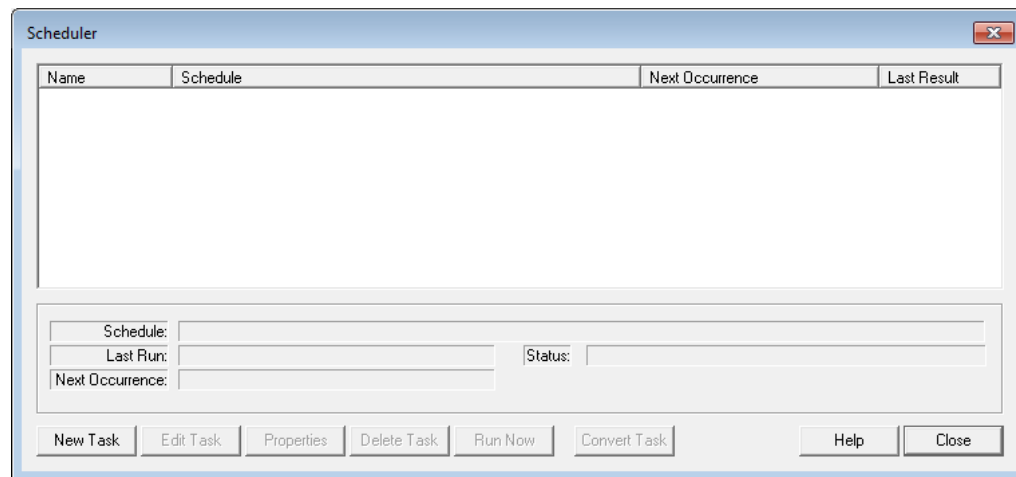


## E-mail Reports

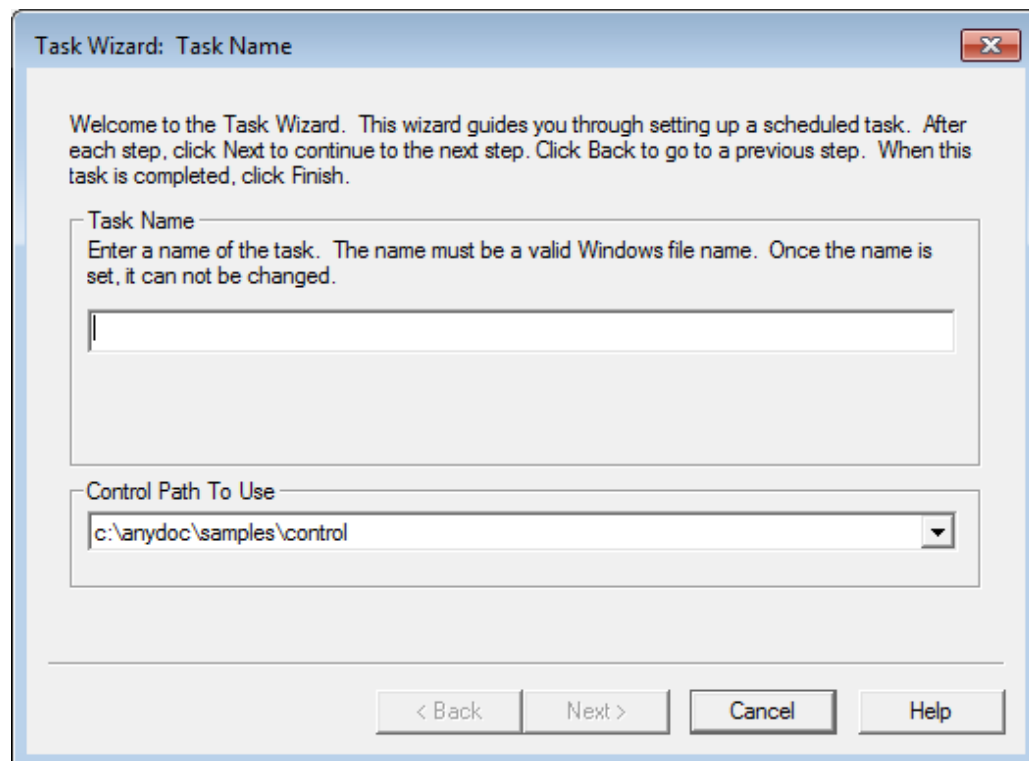
You can use the Task Scheduler to schedule e-mailing a copy of any reports that were written to disk.

## Steps

- 1 Open the MANAGEit Task Scheduler by performing one of the following steps:
  - Select **Settings | MANAGEit Task Scheduler**.
  - Click the **MANAGEit Task Scheduler** button . The **Scheduler** window is displayed.



- 2 Click **New Task**. The **Task Wizard: Task Name** window is displayed.



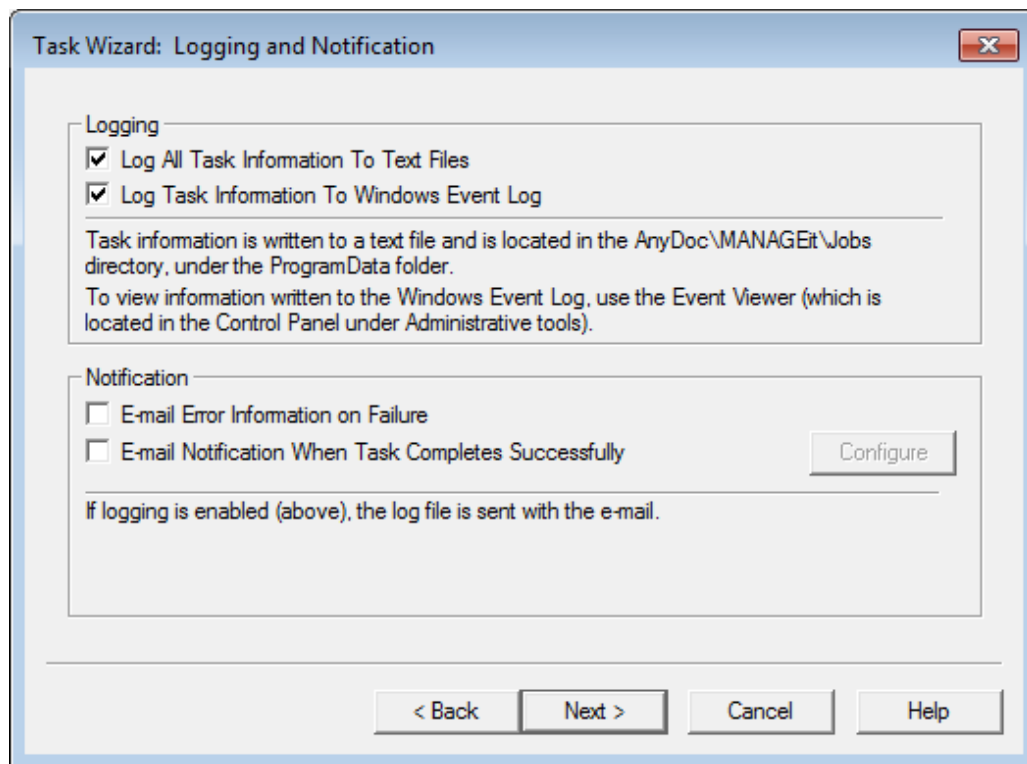
**Task Scheduler**

- 3 In the **Task Name** field, enter a name for the new task. This name must be a valid DOS long file name. After you enter a task name and go to the next page, the name cannot be changed. If you enter an invalid character, it appears in red and the station beeps as a warning.
- 4 Select a **Control Path To Use**. All control paths currently being monitored are listed.



Each task only applies to one control path. If multiple control paths are being monitored, you must schedule separate tasks for each control path.

- 5 Click **Next**. The **Task Wizard: Logging and Notification** window is displayed.



- 6 Select the **Log All Task Information To Text Files** check box to create text files with a trace of all steps taken by a task while performing its assigned actions. The log files are created in C:\ProgramData\AnyDoc\MANAGEit\Jobs and have the same name as the scheduled task.
- 7 Select the **Log Task Information To Windows Event Log** check box to create a record of a task's start and end in the Windows Event Log. Any errors occurring during processing are also recorded in the Windows Event Log. The Event Log is available from **Start | Control Panel | Administrative Tools | Event Viewer**. The Event Viewer allows you to see the start and end of MANAGEit tasks from other stations.

8 In the **Notification** area, select e-mail notification for one or both of the following:

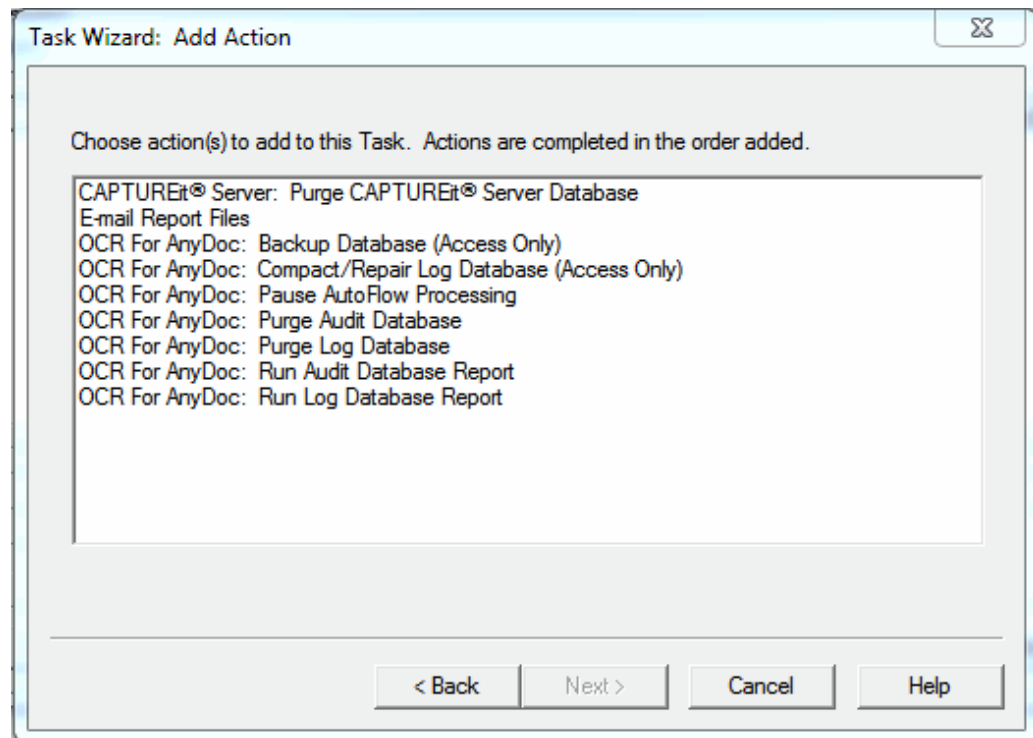
- **E-Mail Error Information on Failure**
- **E-Mail Notification When Task Completes Successfully**

Selecting either of these e-mail notifications activates the **Configure** button. Click **Configure** to specify e-mail recipients. See E-mail Alert Notifications (page 97).



If either of the options in the Logging area are selected, the log file is sent with the e-mail notification.

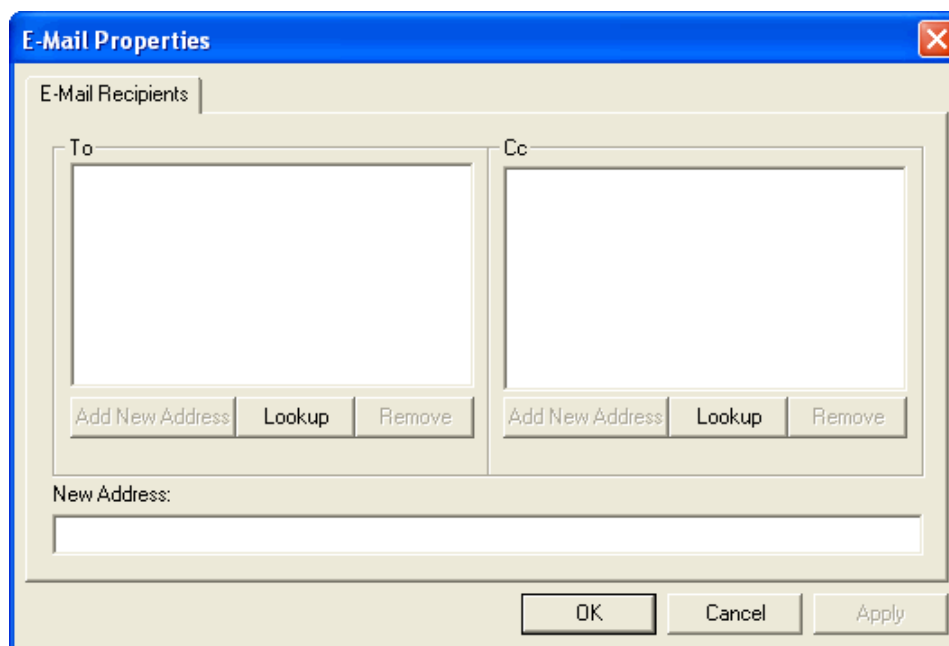
9 Click **Next**. The **Task Wizard: Add Action** window is displayed.



10 Select **E-Mail Report Files** and click **Next**.

**Task Scheduler**

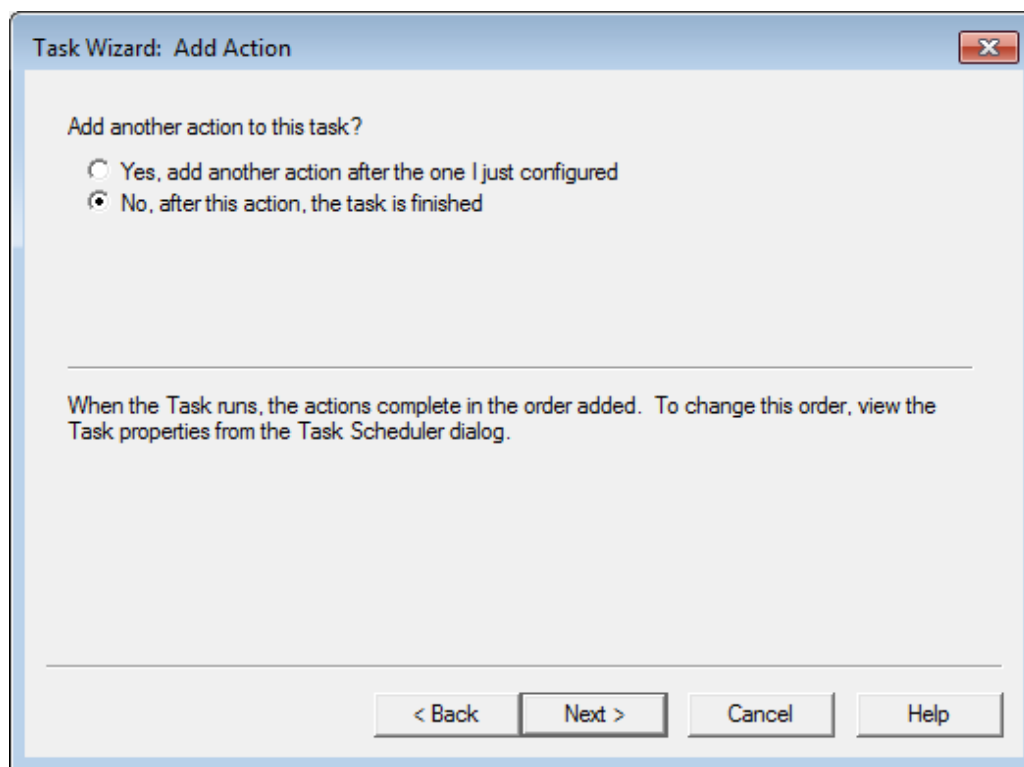
The **E-Mail Properties** window is displayed.



- 11** Enter recipient e-mail address(es) in the **To** and **Cc** fields. Click **Lookup** to display a list of addresses already configured for this e-mail server  
OR  
Add a new address by typing it in the **New Address** field and clicking **Add New Address** under the **To** or **Cc** field.
- 12** Click **OK**.



The **Task Wizard: Add Action** window is displayed.



- 13** Select **Yes** to add another action to the same task. Repeat previous steps until all actions have been added

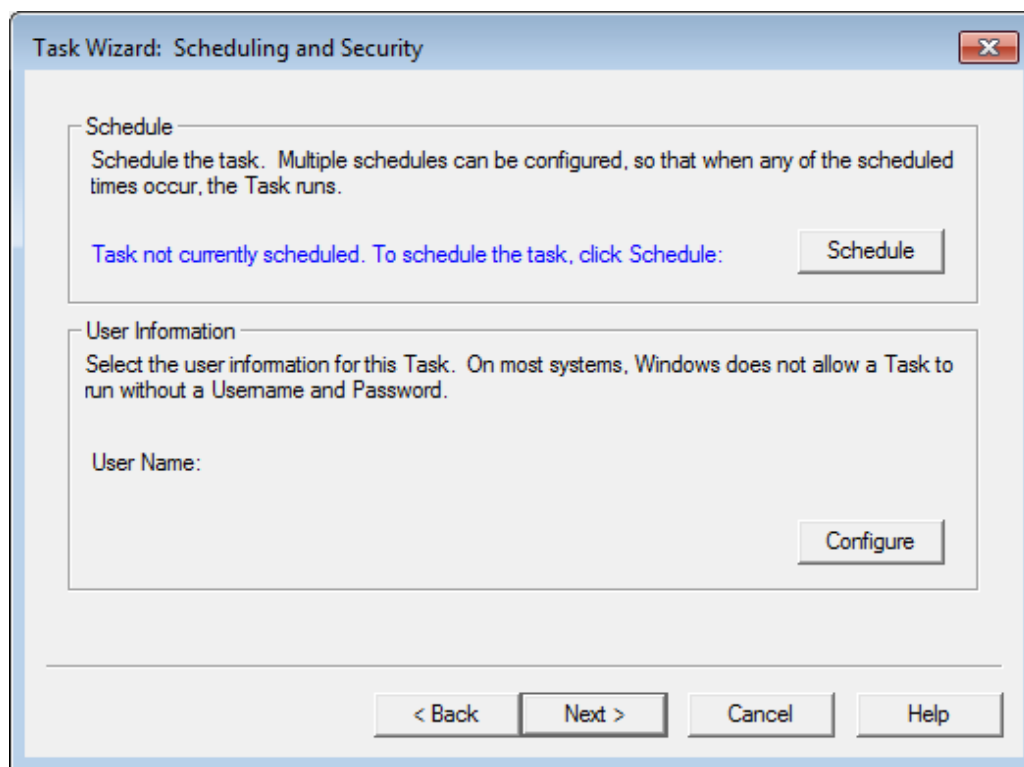
OR

Select **No** if you have finished adding actions.

- 14** Click **Next** to schedule the task and set appropriate security.

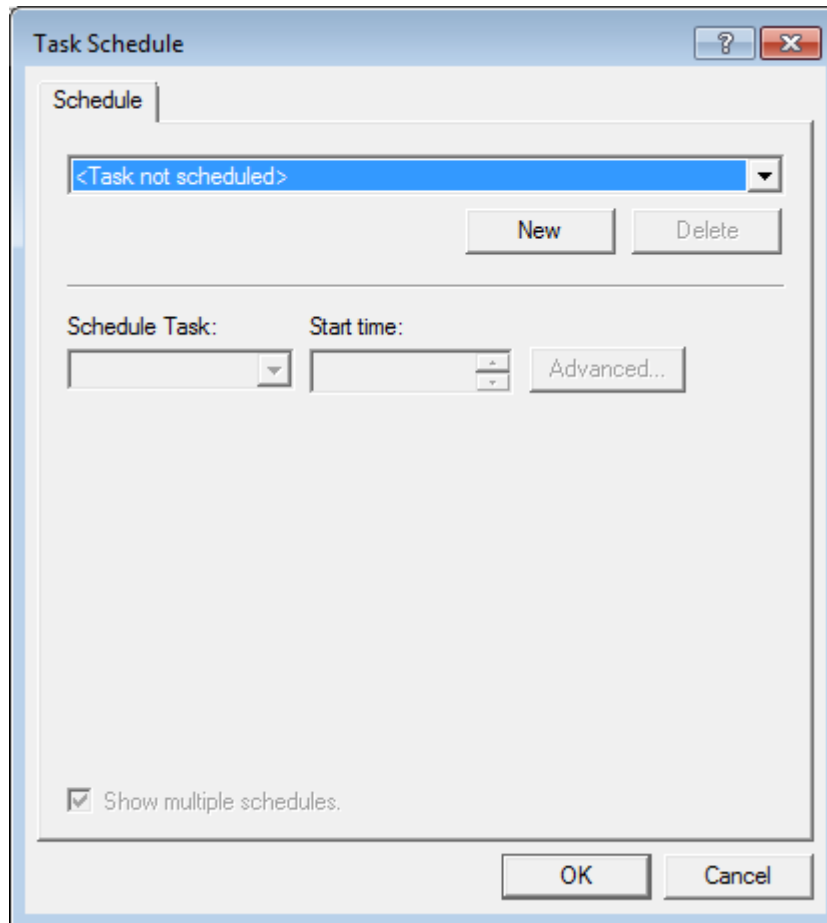
**Task Scheduler**

The **Task Wizard: Scheduling and Security** window is displayed.



**15** Click **Schedule**.

The **Task Schedule** window is displayed.



- 16 Click **New** to create a schedule for this task.

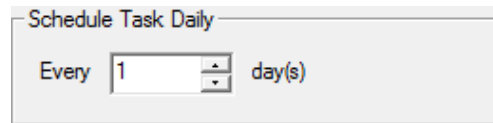
You can create multiple schedules for a single task. The **Schedule** tab reflects the new schedule that you are creating. Click the arrow for a list of schedules that have already been created for this task. This field only appears if **Show multiple schedules** is selected.

- 17 Select an option from the **Schedule Task** menu to select how frequently the task is performed.



It is strongly recommended that you do not schedule tasks to run At System Startup, At Logon, or When idle. These schedule items require user intervention.

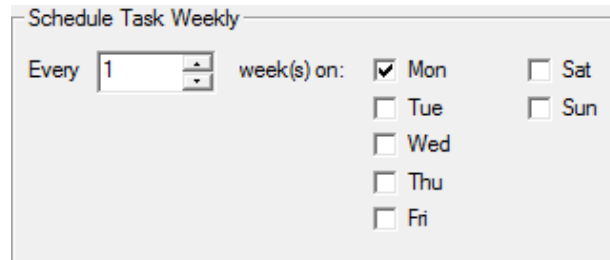
- 18 If **Daily**, **Weekly**, **Monthly**, or **Once** was selected from the **Schedule Task** menu, enter a **Start Time** for the task. Depending on the option selected from the **Schedule Task** menu the **Schedule Task** section offers different options.

**Task Scheduler**

Schedule Task Daily

Every  day(s)

Appears when Daily is chosen for the task frequency. Enter the frequency in days.

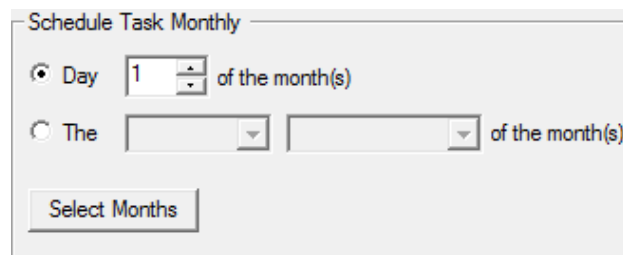


Schedule Task Weekly

Every  week(s) on:

<input checked="" type="checkbox"/> Mon	<input type="checkbox"/> Sat
<input type="checkbox"/> Tue	<input type="checkbox"/> Sun
<input type="checkbox"/> Wed	
<input type="checkbox"/> Thu	
<input type="checkbox"/> Fri	

Appears when Weekly is selected for the task frequency. Enter the frequency in weeks and select the day(s) of the week to run the task.

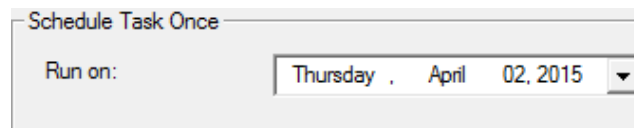


Schedule Task Monthly

☒ Day  of the month(s)

☐ The  of the month(s)

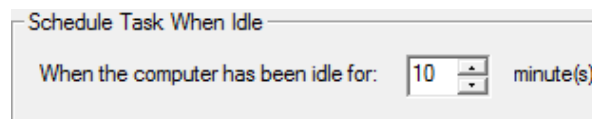
Appears when Monthly is chosen for the task frequency. Select either the Day of the month to run the task, or select The \_\_\_\_ of the month(s) and enter a week and day (e.g., the Third Friday of the month). Click Select Months to select specific month(s) to run the task.



Schedule Task Once

Run on:

Appears when Once is selected for the task frequency. Select the date to run the task.



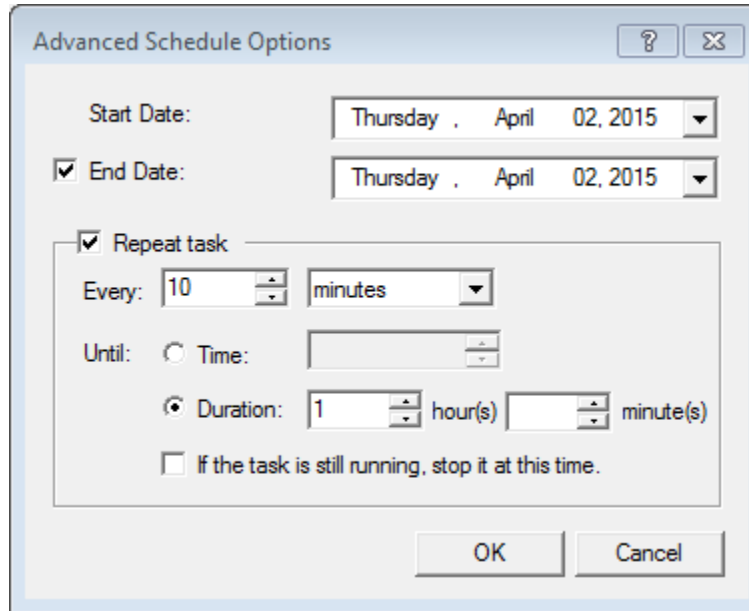
Schedule Task When Idle

When the computer has been idle for:  minute(s)

Appears when When idle is selected for the task frequency. Enter the number of minutes that the station must be idle before running the task.

- 19** To set up more than one schedule for this task, enable the **Show multiple schedules** check box.

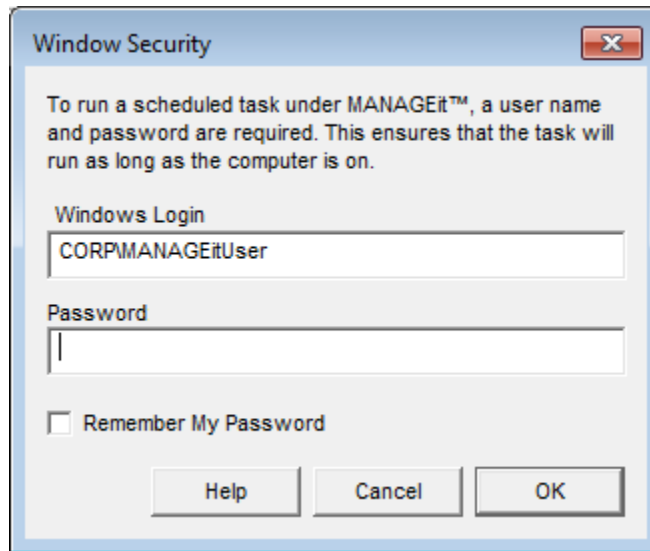
- 20 Click the **Advanced** button to access additional scheduling options.

The image shows a Windows-style dialog box titled "Advanced Schedule Options". It has a light blue title bar with a question mark icon and a close button (X). The dialog contains several fields and checkboxes. At the top, there is a "Start Date:" label followed by a date picker showing "Thursday , April 02, 2015". Below this is a checked checkbox labeled "End Date:" followed by another date picker showing "Thursday , April 02, 2015". Underneath is another checked checkbox labeled "Repeat task". Below the "Repeat task" checkbox is a section for configuring the repeat interval. It starts with "Every:" followed by a spinner box set to "10" and a dropdown menu set to "minutes". Below this is an "Until:" label with two radio buttons. The first radio button is labeled "Time:" and is currently unselected, followed by an empty time input field. The second radio button is labeled "Duration:" and is selected, followed by a spinner box set to "1", a label "hour(s)", another spinner box, and a label "minute(s)". At the bottom of this section is an unchecked checkbox labeled "If the task is still running, stop it at this time.". At the very bottom of the dialog are two buttons: "OK" and "Cancel".

- 21 Enter the **Start Date** or use the arrow to select the date from a calendar.
- 22 Select the **End Date** check box and enter the date to stop running the task or use the arrow to select the date from a calendar, if needed.
- 23 Select the **Repeat Task** check box to configure how often to repeat the task. Choose to repeat it every selected number of minutes or hours, until a selected time, or for a selected number of minutes/hours. You can also select to stop the task by selecting the If the task is still running, stop it at this time check box.
- 24 Click **OK** in the Advanced Schedule Options window, then click **OK** in the Task Schedule window. The Task Wizard: Scheduling and Security window reappears.

**Task Scheduler**

- 25 Click **Configure** to set a user name and password to run the task(s). The Window Security window appears.



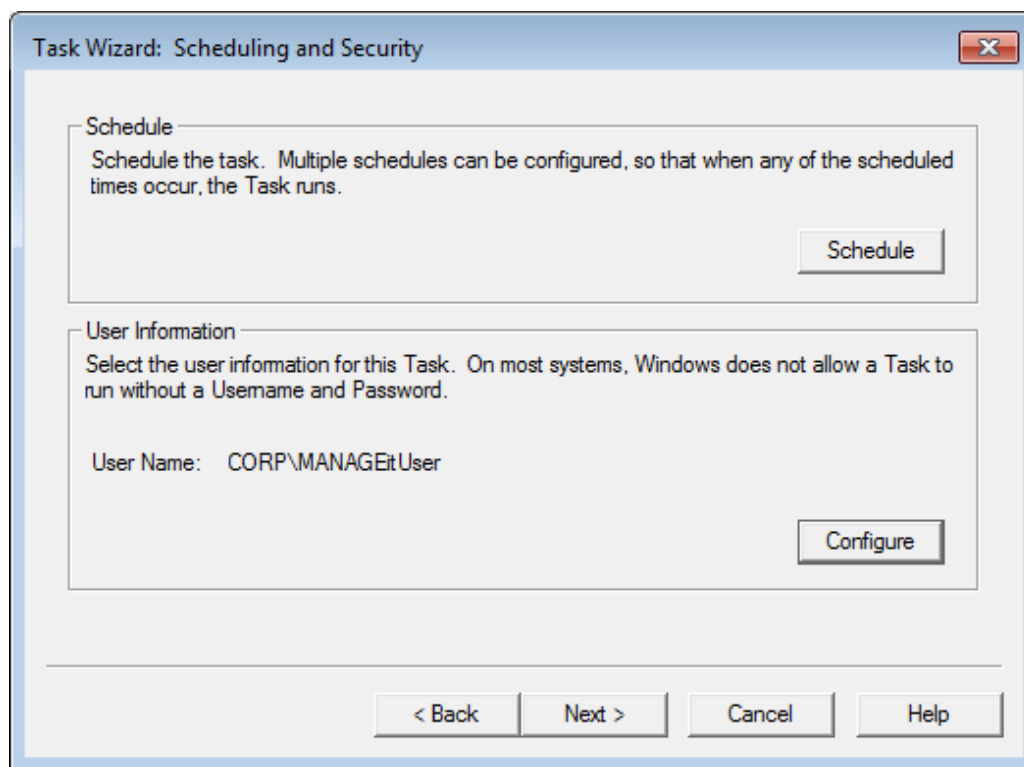
- 26 Enter a user name and password. The user identified must have access to all drives used by OCR for AnyDoc (such as the Control directory).



If you are using a networked path and a domain name is required, it must be entered with the user name for the task to run. Check with your System Administrator to determine if your network settings require a domain name.

- 27 Select the **Remember My Password** check box to carry out the task without running MANAGEit. Selecting this check box also avoids being prompted every time you update the task.
- 28 Click **OK** when finished.

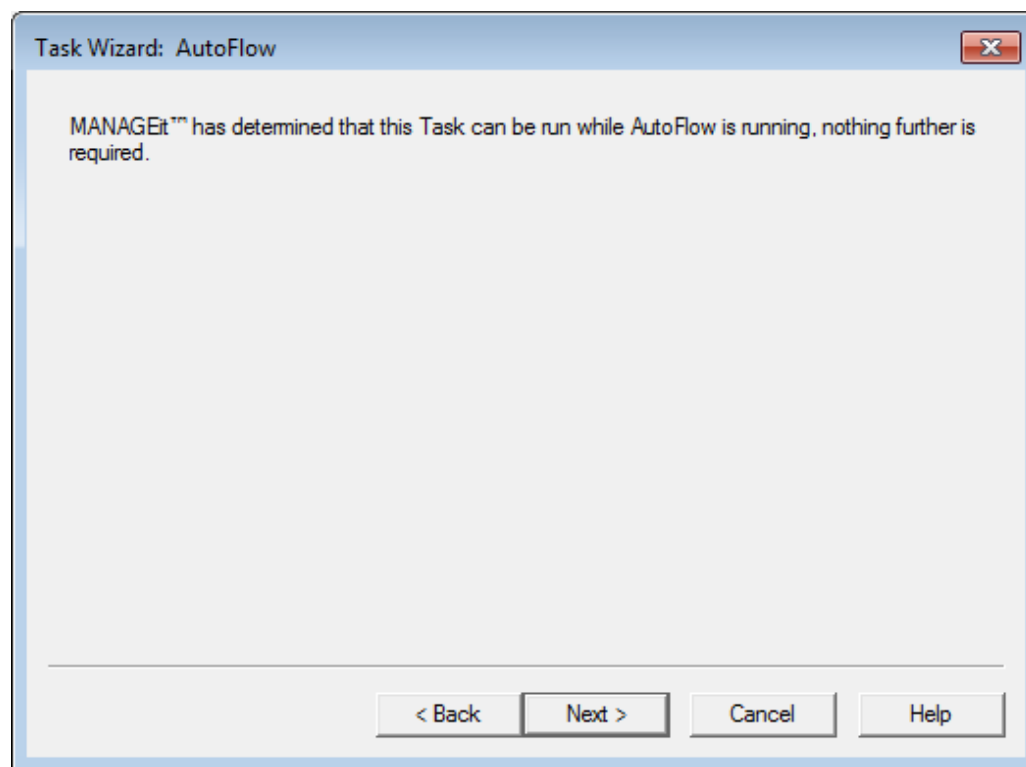
The **Scheduling and Security** window displays the configured user name.



**29** Click **Next**.

**Task Scheduler**

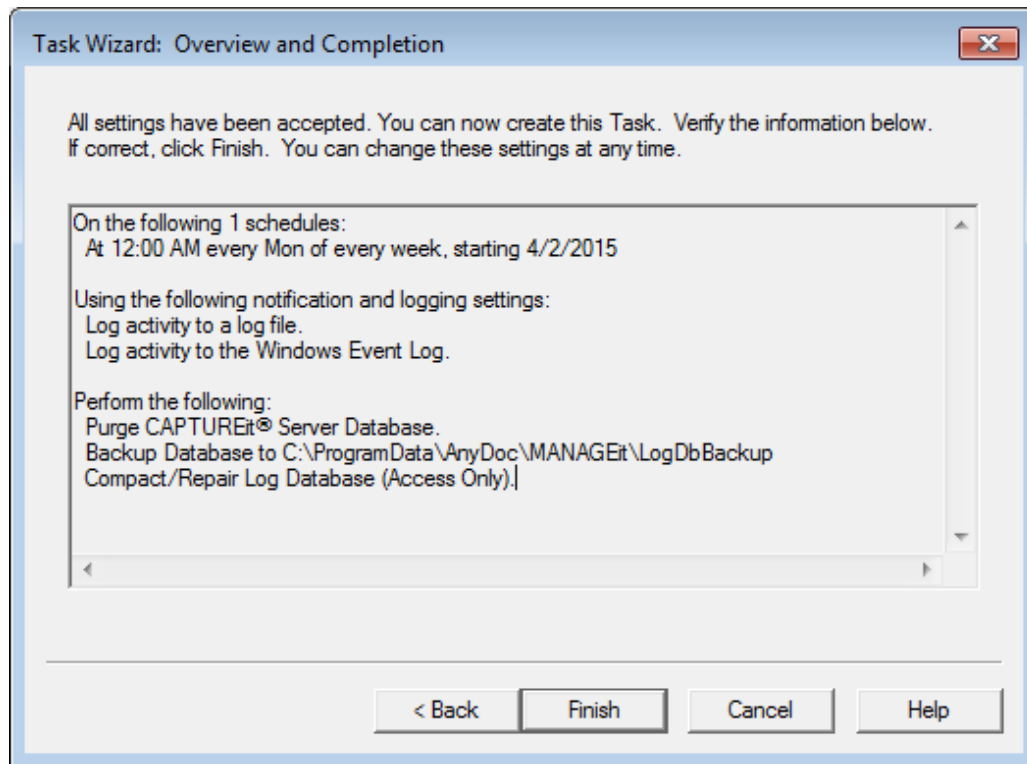
The **Task Wizard: AutoFlow** window is displayed.



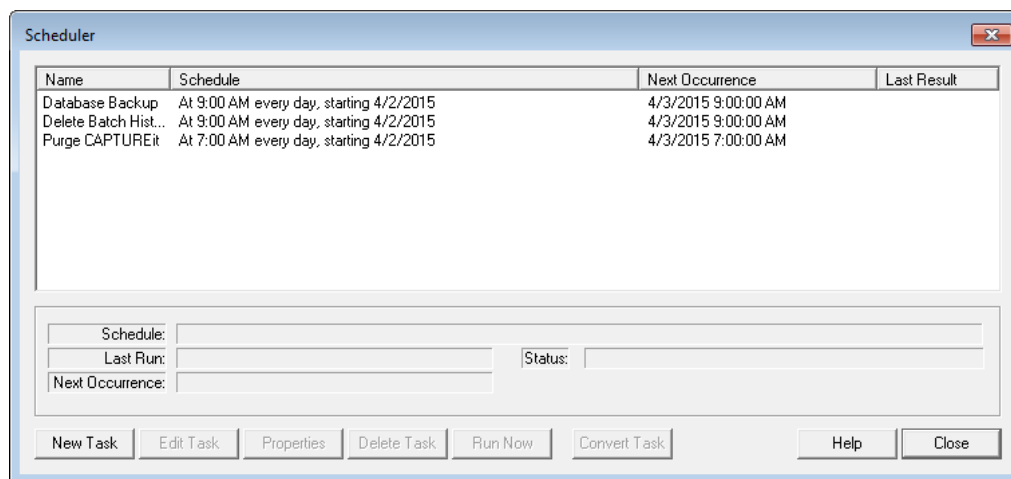
**30** Click **Next**.



The **Task Wizard: Overview and Completion** window displays information concerning the task you have just scheduled.




- 31 Click **Back** to return to edit a selected task or click **Finish** to run the task on the configured schedule. The **Scheduler** window displays the configured tasks.

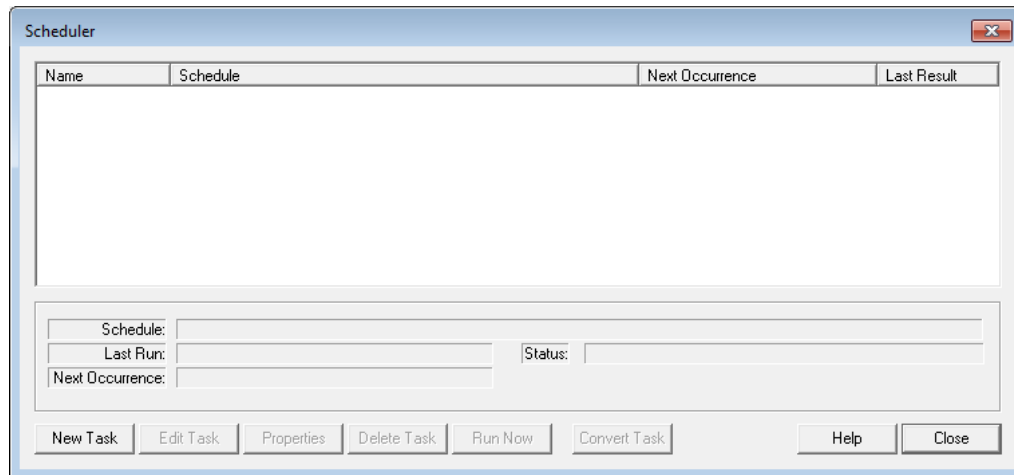


## Auditor Database Report

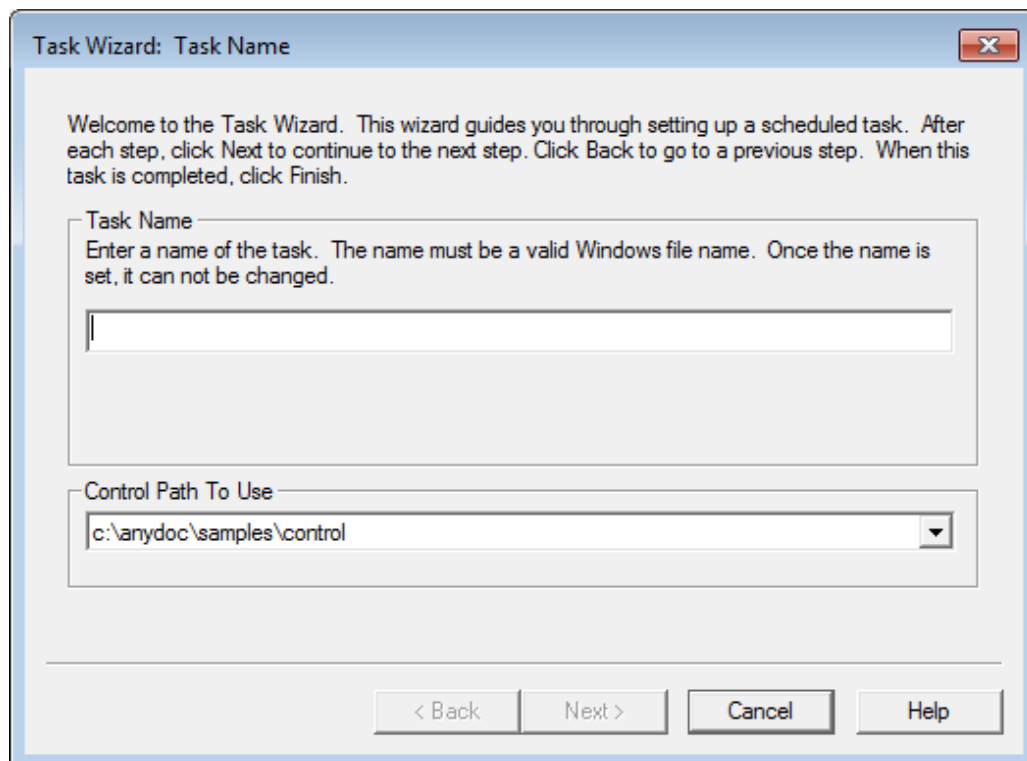
The Auditor Database Report can be scheduled to run at specified time(s) using the Task Scheduler.

**Task Scheduler****Steps**

- 1 Open the MANAGEit Task Scheduler by performing one of the following steps:
  - Select **Settings | MANAGEit Task Scheduler**.
  - Click the **MANAGEit Task Scheduler** button . The **Scheduler** window is displayed.



- 2 Click **New Task**. The **Task Wizard: Task Name** window is displayed.



- 3 In the **Task Name** field, enter a name for the new task. This name must be a valid DOS long file name. After you enter a task name and go to the next page, the name cannot be changed. If you enter an invalid character, it appears in red and the station beeps as a warning.
- 4 Select a **Control Path To Use**. All control paths currently being monitored are listed.



Each task only applies to one control path. If multiple control paths are being monitored, you must schedule separate tasks for each control path.

- 5 Click **Next**. The **Task Wizard: Logging and Notification** window is displayed.

- 6 Select the **Log All Task Information To Text Files** check box to create text files with a trace of all steps taken by a task while performing its assigned actions. The log files are created in C:\ProgramData\AnyDoc\MANAGEit\Jobs and have the same name as the scheduled task.
- 7 Select the **Log Task Information To Windows Event Log** check box to create a record of a task's start and end in the Windows Event Log. Any errors occurring during processing are also recorded in the Windows Event Log. The Event Log is available from **Start | Control Panel | Administrative Tools | Event Viewer**. The Event Viewer allows you to see the start and end of MANAGEit tasks from other stations.

**Task Scheduler**

- 8 In the **Notification** area, select e-mail notification for one or both of the following:

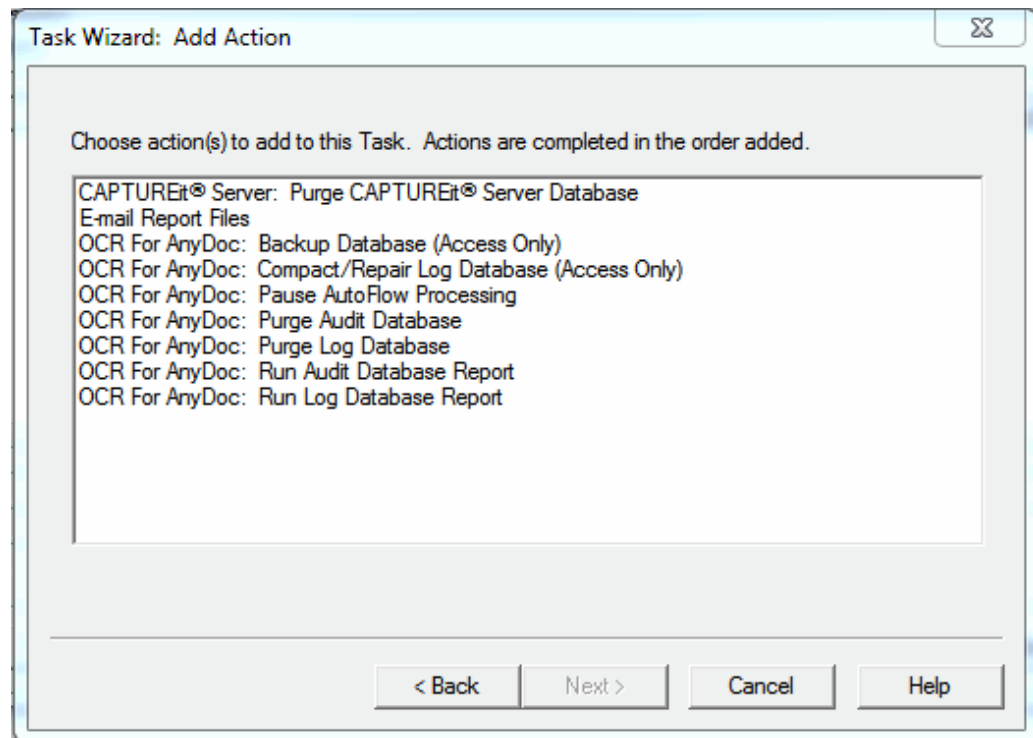
- **E-Mail Error Information on Failure**
- **E-Mail Notification When Task Completes Successfully**

Selecting either of these e-mail notifications activates the **Configure** button. Click **Configure** to specify e-mail recipients. See E-mail Alert Notifications (page 97).



If either of the options in the Logging area are selected, the log file is sent with the e-mail notification.

- 9 Click **Next**. The **Task Wizard: Add Action** window is displayed.

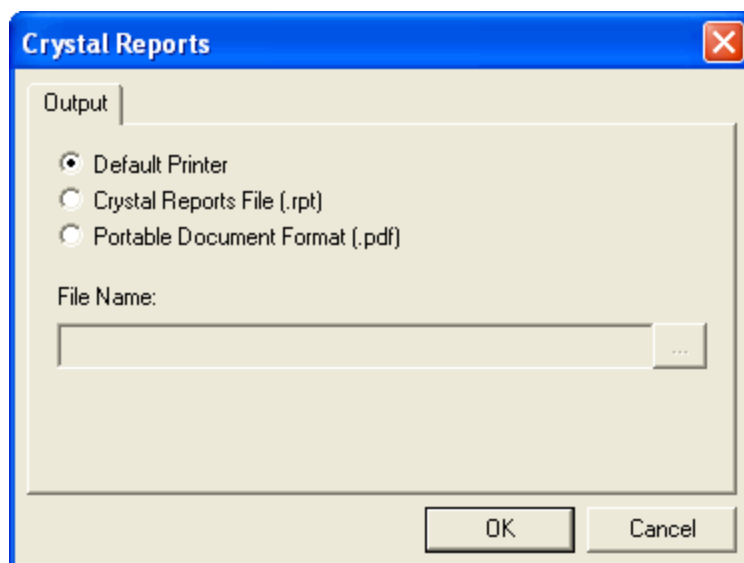


- 10 Select **Audit Database Report** and click **Next**.

The **Print Report** window is displayed.

- 11 Click **OK**.

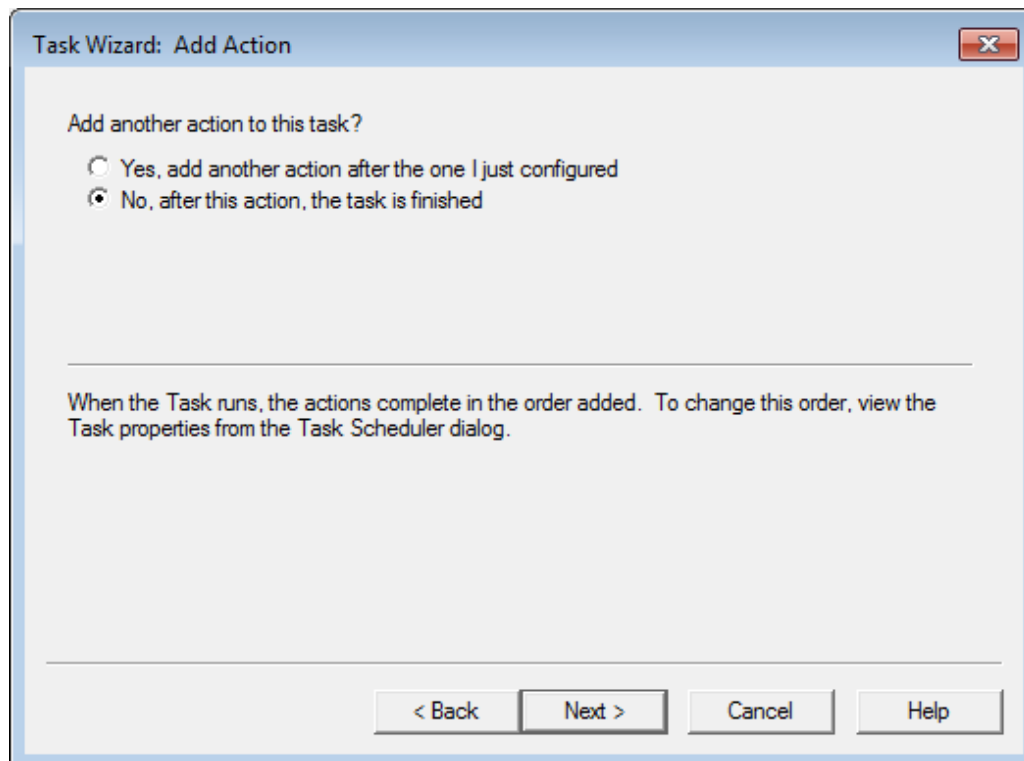
The **Crystal Reports** window is displayed.



- 12 Select the output destination. If you chose one of the file options, enter a file name or click the browse button to browse for a location.

- 13 Click **OK**.

The **Task Wizard: Add Action** window is displayed.



**Task Scheduler**

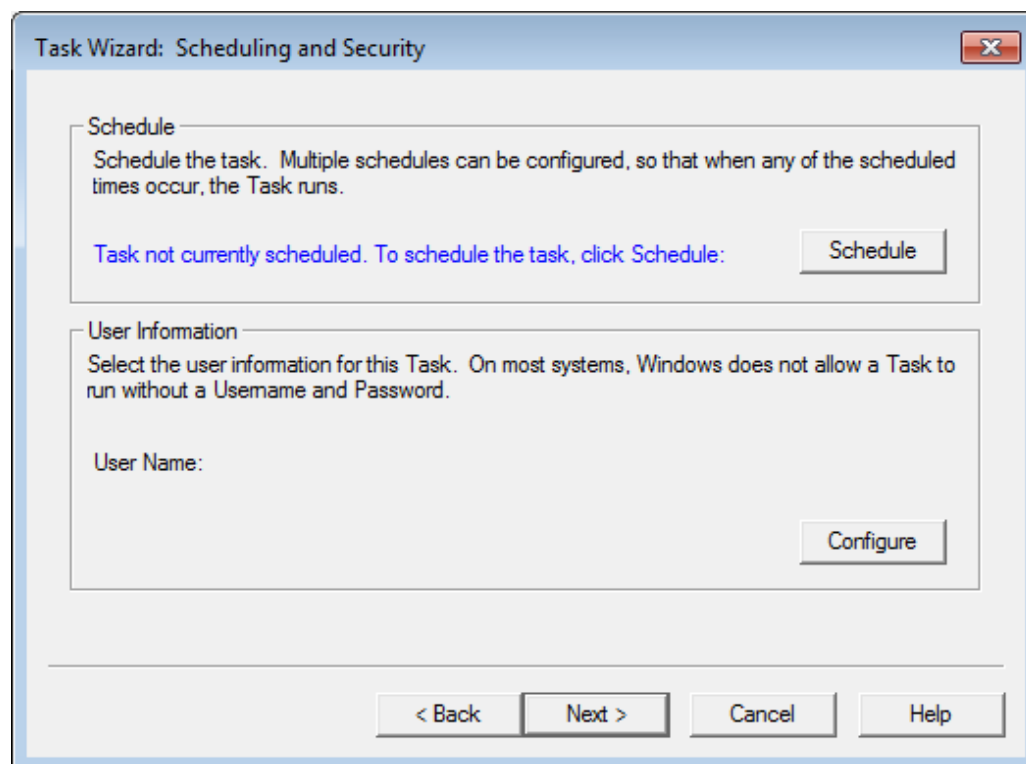
- 14 Select **Yes** to add another action to the same task. Repeat previous steps until all actions have been added

OR

Select **No** if you have finished adding actions.

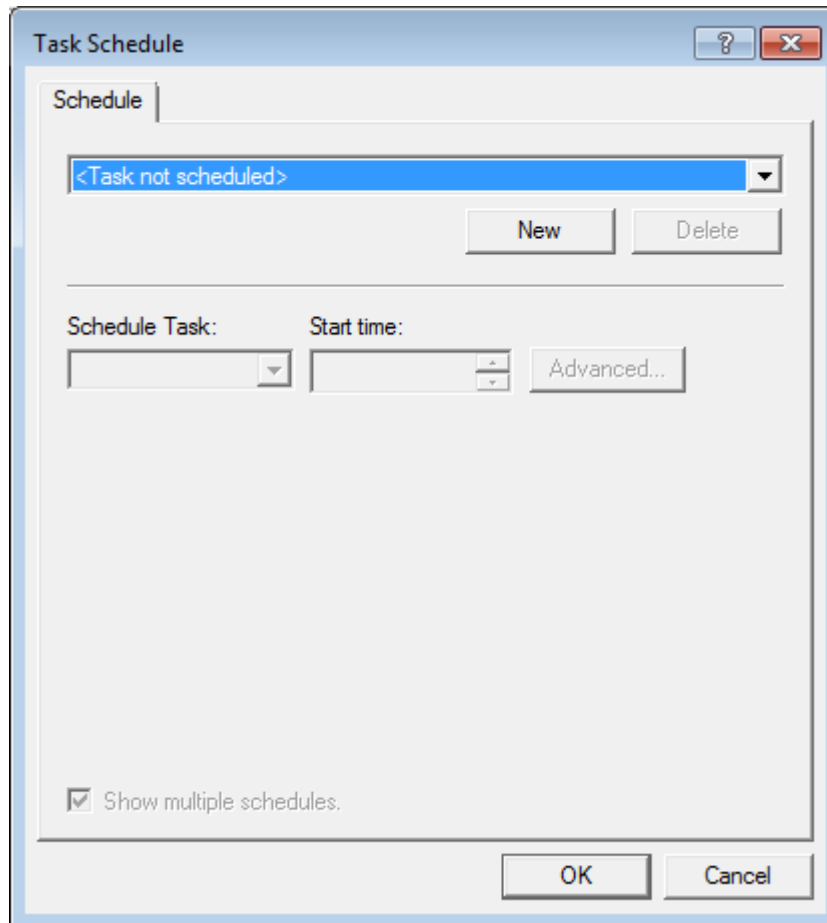
- 15 Click **Next** to schedule the task and set appropriate security.

The **Task Wizard: Scheduling and Security** window is displayed.



- 16 Click **Schedule**.

The **Task Schedule** window is displayed.



- 17 Click **New** to create a schedule for this task.

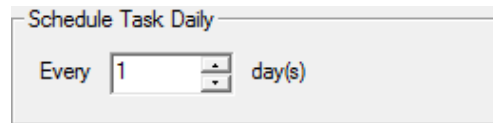
You can create multiple schedules for a single task. The **Schedule** tab reflects the new schedule that you are creating. Click the arrow for a list of schedules that have already been created for this task. This field only appears if **Show multiple schedules** is selected.

- 18 Select an option from the **Schedule Task** menu to select how frequently the task is performed.



It is strongly recommended that you do not schedule tasks to run At System Startup, At Logon, or When idle. These schedule items require user intervention.

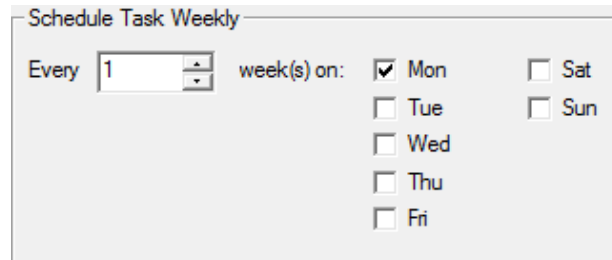
- 19 If **Daily**, **Weekly**, **Monthly**, or **Once** was selected from the **Schedule Task** menu, enter a **Start Time** for the task. Depending on the option selected from the **Schedule Task** menu the **Schedule Task** section offers different options.

**Task Scheduler**


Schedule Task Daily

Every  day(s)

Appears when Daily is chosen for the task frequency. Enter the frequency in days.

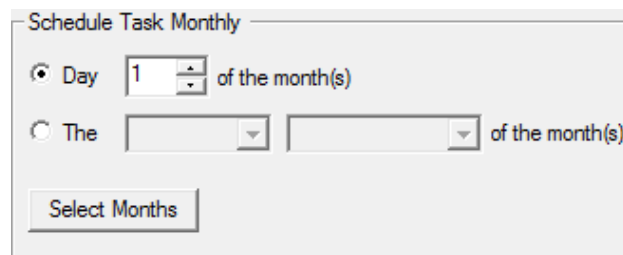


Schedule Task Weekly

Every  week(s) on:

<input checked="" type="checkbox"/> Mon	<input type="checkbox"/> Sat
<input type="checkbox"/> Tue	<input type="checkbox"/> Sun
<input type="checkbox"/> Wed	
<input type="checkbox"/> Thu	
<input type="checkbox"/> Fri	

Appears when Weekly is selected for the task frequency. Enter the frequency in weeks and select the day(s) of the week to run the task.

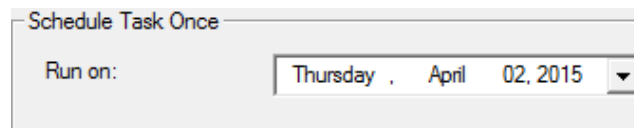


Schedule Task Monthly

☒ Day  of the month(s)

☐ The  of the month(s)

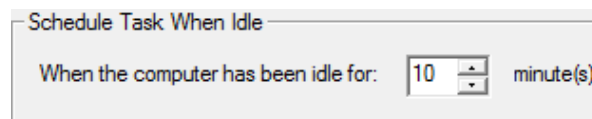
Appears when Monthly is chosen for the task frequency. Select either the Day of the month to run the task, or select The \_\_\_\_ of the month(s) and enter a week and day (e.g., the Third Friday of the month). Click Select Months to select specific month(s) to run the task.



Schedule Task Once

Run on:

Appears when Once is selected for the task frequency. Select the date to run the task.



Schedule Task When Idle

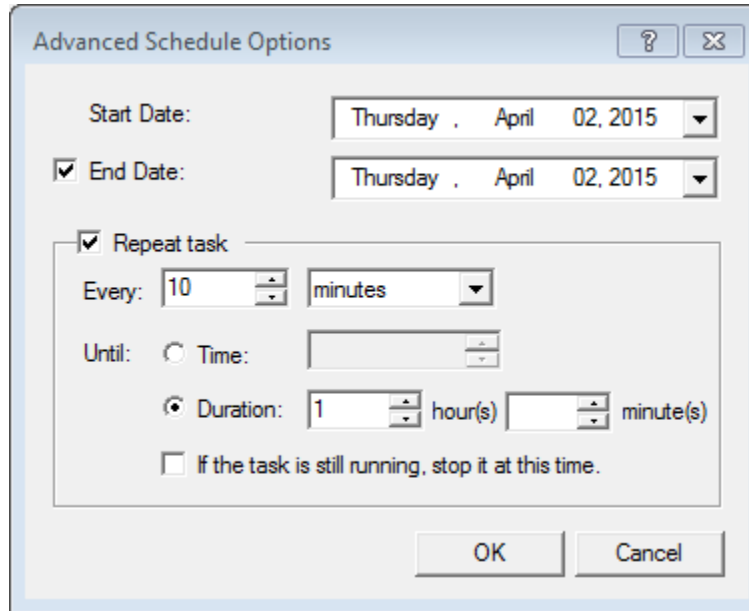
When the computer has been idle for:  minute(s)

Appears when When idle is selected for the task frequency. Enter the number of minutes that the station must be idle before running the task.

- 20** To set up more than one schedule for this task, enable the **Show multiple schedules** check box.



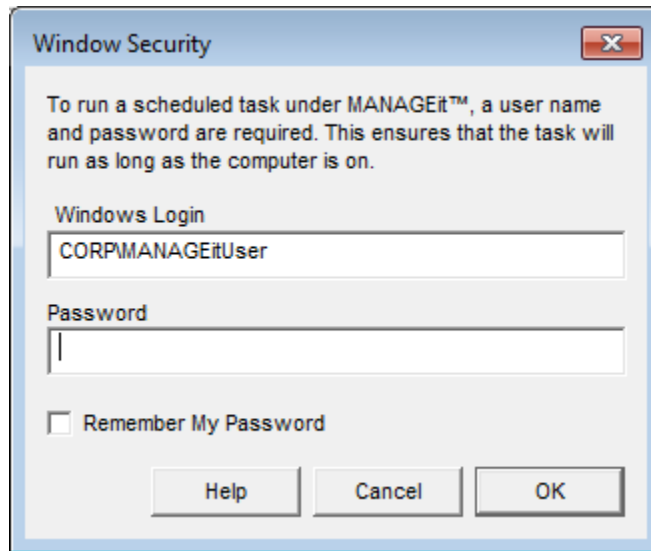
- 21 Click the **Advanced** button to access additional scheduling options.

The image shows a Windows-style dialog box titled "Advanced Schedule Options". It has a light blue title bar with a question mark icon and a close button (X). The dialog contains several fields and checkboxes. At the top, there is a "Start Date:" label followed by a date picker showing "Thursday , April 02, 2015". Below this is a checked checkbox labeled "End Date:" followed by another date picker showing "Thursday , April 02, 2015". Further down is a checked checkbox labeled "Repeat task". Below this checkbox is a section for repeating the task. It starts with "Every:" followed by a spinner box set to "10" and a dropdown menu set to "minutes". Below that is an "Until:" label with two radio buttons. The first radio button is labeled "Time:" and is currently unselected, followed by an empty time input field. The second radio button is labeled "Duration:" and is selected, followed by a spinner box set to "1", a label "hour(s)", another spinner box, and a label "minute(s)". At the bottom of this section is an unchecked checkbox labeled "If the task is still running, stop it at this time.". At the very bottom of the dialog are two buttons: "OK" and "Cancel".

- 22 Enter the **Start Date** or use the arrow to select the date from a calendar.
- 23 Select the **End Date** check box and enter the date to stop running the task or use the arrow to select the date from a calendar, if needed.
- 24 Select the **Repeat Task** check box to configure how often to repeat the task. Choose to repeat it every selected number of minutes or hours, until a selected time, or for a selected number of minutes/hours. You can also select to stop the task by selecting the If the task is still running, stop it at this time check box.
- 25 Click **OK** in the Advanced Schedule Options window, then click **OK** in the Task Schedule window. The Task Wizard: Scheduling and Security window reappears.

**Task Scheduler**

- 26 Click **Configure** to set a user name and password to run the task(s). The Window Security window appears.



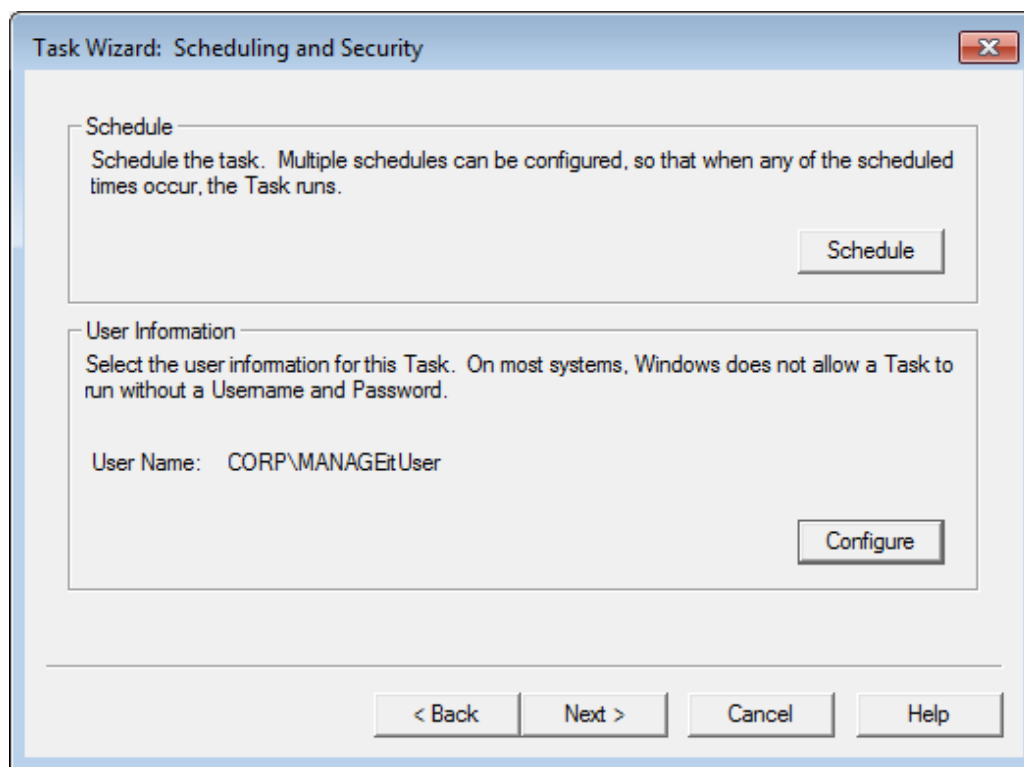
- 27 Enter a user name and password. The user identified must have access to all drives used by OCR for AnyDoc (such as the Control directory).



If you are using a networked path and a domain name is required, it must be entered with the user name for the task to run. Check with your System Administrator to determine if your network settings require a domain name.

- 28 Select the **Remember My Password** check box to carry out the task without running MANAGEit. Selecting this check box also avoids being prompted every time you update the task.
- 29 Click **OK** when finished.

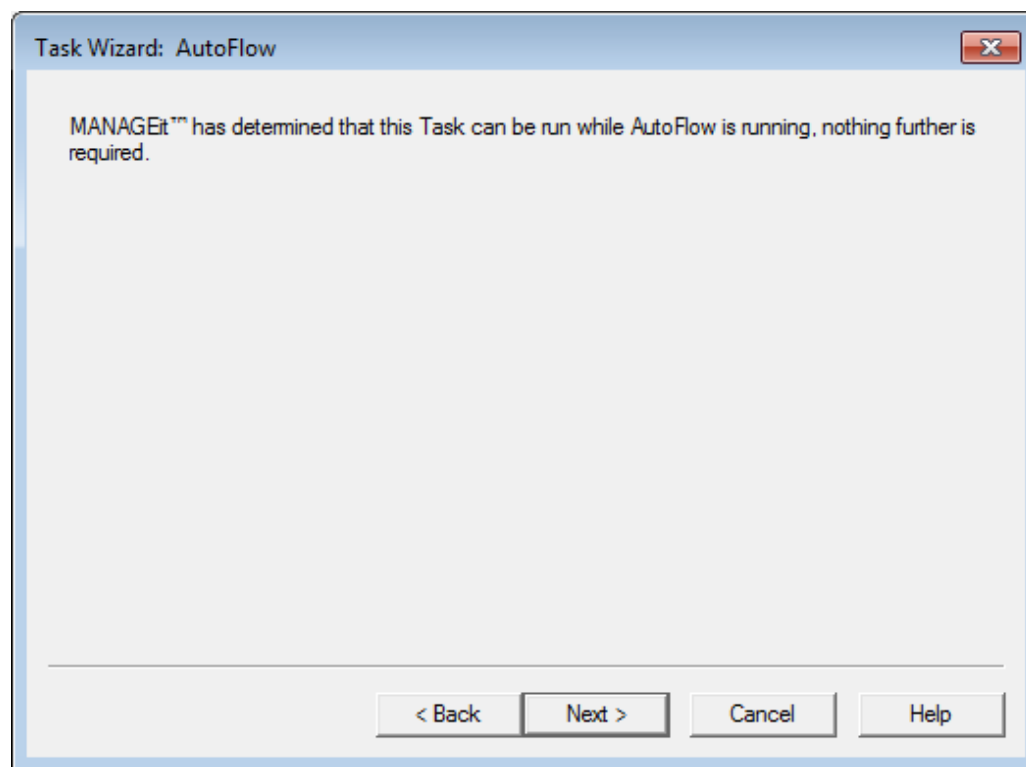
The **Scheduling and Security** window displays the configured user name.



**30** Click **Next**.

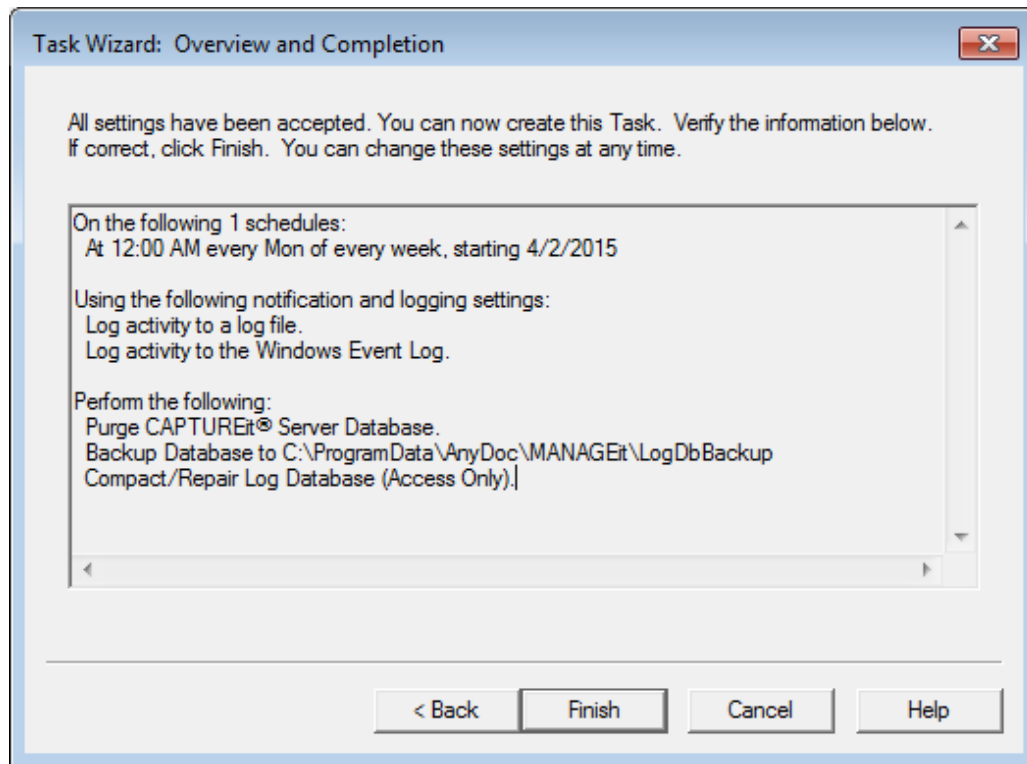
**Task Scheduler**

The **Task Wizard: AutoFlow** window is displayed.

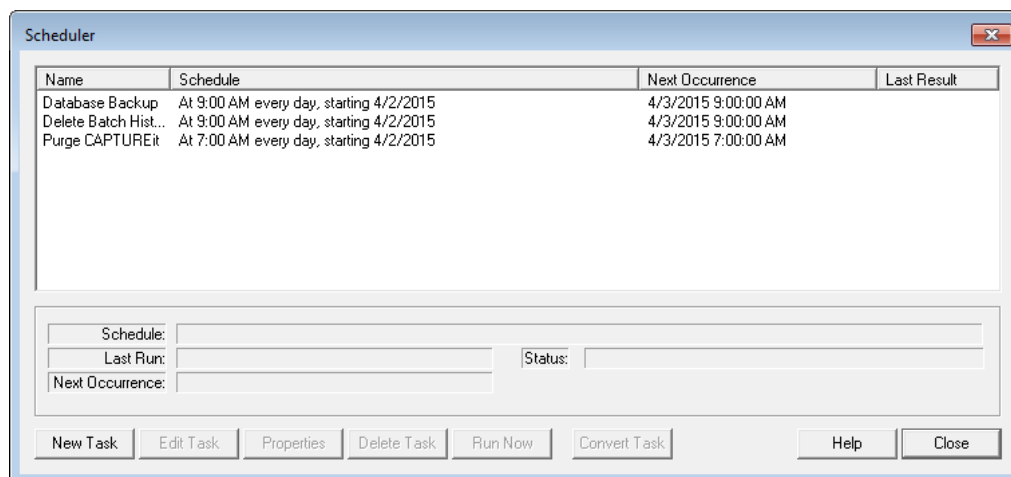


**31** Click **Next**.

The **Task Wizard: Overview and Completion** window displays information concerning the task you have just scheduled.




- 32** Click **Back** to return to edit a selected task or click **Finish** to run the task on the configured schedule. The **Scheduler** window displays the configured tasks.

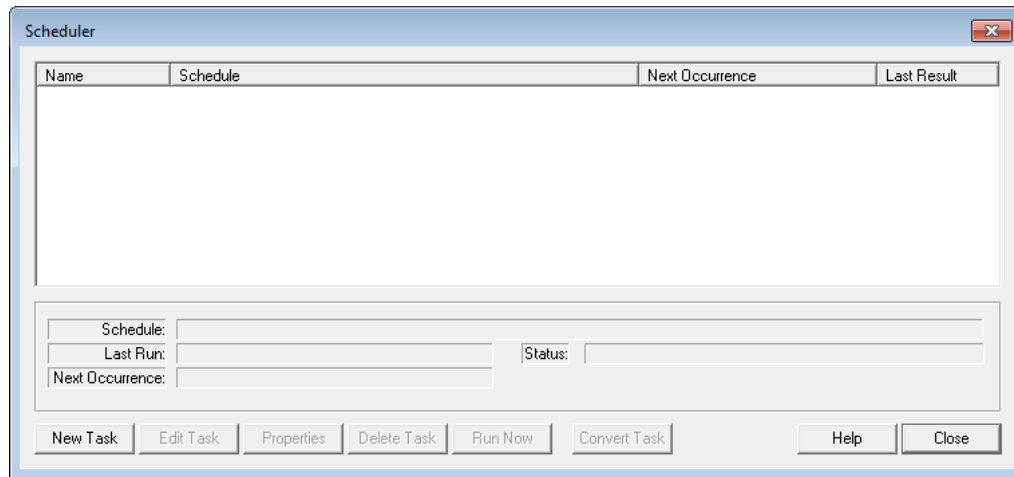


## Purge the Audit Database

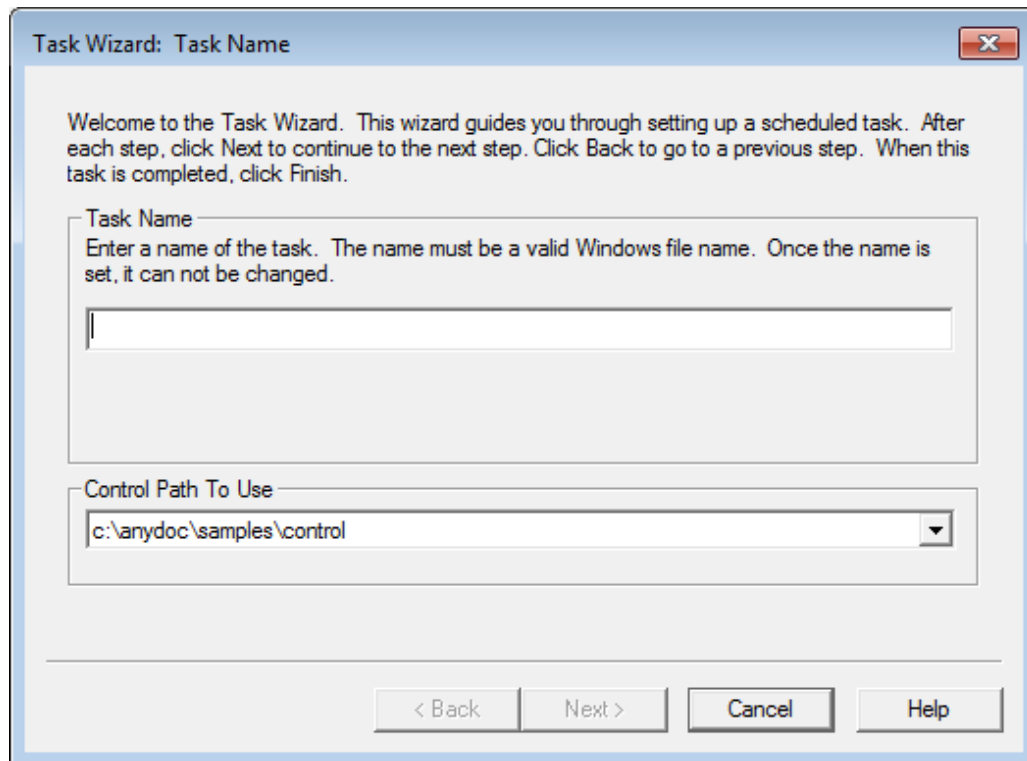
You can schedule to purge Audit database records older than a specified number of days, or all records in the Audit database using the Task Scheduler.

**Task Scheduler****Steps**

- 1 Open the MANAGEit Task Scheduler by performing one of the following steps:
  - Select **Settings | MANAGEit Task Scheduler**.
  - Click the **MANAGEit Task Scheduler** button . The **Scheduler** window is displayed.



- 2 Click **New Task**. The **Task Wizard: Task Name** window is displayed.



- 3 In the **Task Name** field, enter a name for the new task. This name must be a valid DOS long file name. After you enter a task name and go to the next page, the name cannot be changed. If you enter an invalid character, it appears in red and the station beeps as a warning.
- 4 Select a **Control Path To Use**. All control paths currently being monitored are listed.



Each task only applies to one control path. If multiple control paths are being monitored, you must schedule separate tasks for each control path.

- 5 Click **Next**. The **Task Wizard: Logging and Notification** window is displayed.

- 6 Select the **Log All Task Information To Text Files** check box to create text files with a trace of all steps taken by a task while performing its assigned actions. The log files are created in C:\ProgramData\AnyDoc\MANAGEit\Jobs and have the same name as the scheduled task.
- 7 Select the **Log Task Information To Windows Event Log** check box to create a record of a task's start and end in the Windows Event Log. Any errors occurring during processing are also recorded in the Windows Event Log. The Event Log is available from **Start | Control Panel | Administrative Tools | Event Viewer**. The Event Viewer allows you to see the start and end of MANAGEit tasks from other stations.

**Task Scheduler**

- 8 In the **Notification** area, select e-mail notification for one or both of the following:

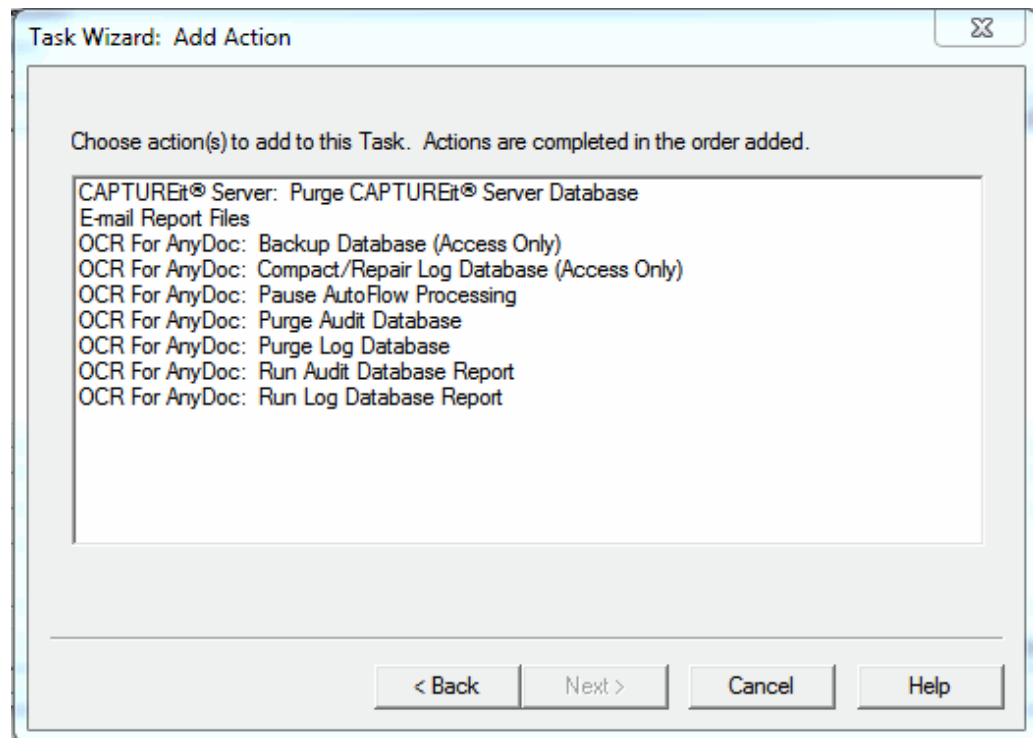
- **E-Mail Error Information on Failure**
- **E-Mail Notification When Task Completes Successfully**

Selecting either of these e-mail notifications activates the **Configure** button. Click **Configure** to specify e-mail recipients. See E-mail Alert Notifications (page 97).



If either of the options in the Logging area are selected, the log file is sent with the e-mail notification.

- 9 Click **Next**. The **Task Wizard: Add Action** window is displayed.



- 10 Select **Purge Audit Database** and click **Next**.

The **Purge Records** window is displayed.





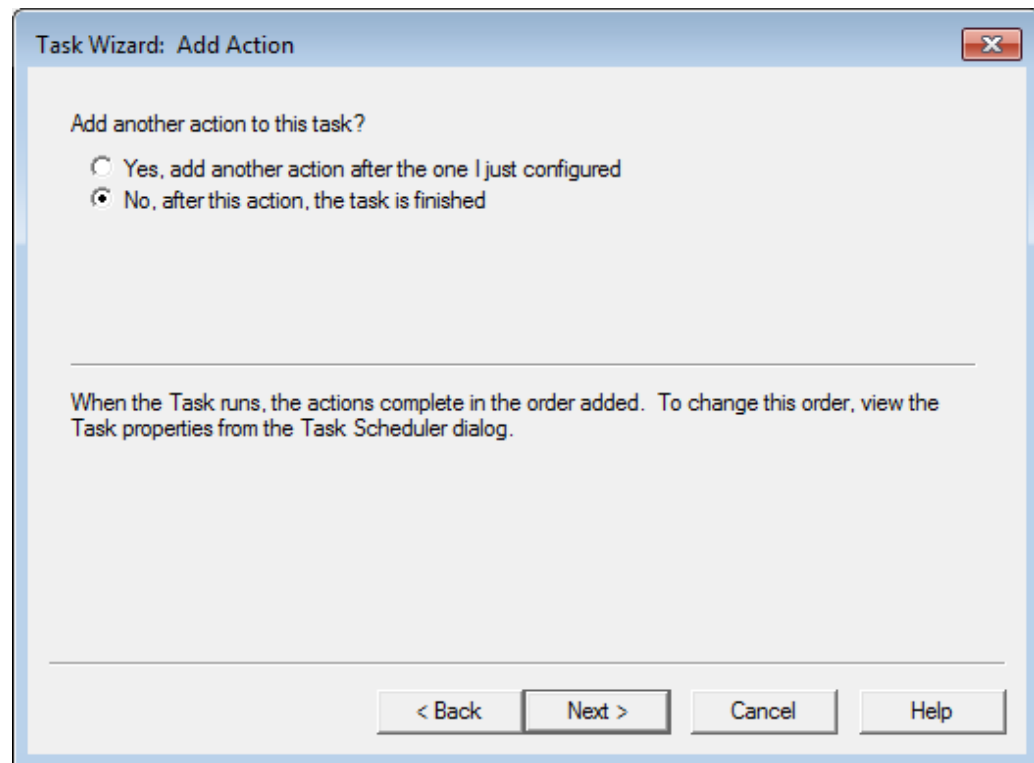
- 11 In the **Purge data older than \_\_\_\_ Days** field, either enter the maximum number of days to keep, or click the arrow to the right of the field to select the date from a calendar. Data older than this date is purged.

OR

Enable the **Purge All Records** option to purge the entire Audit database up to the present.

- 12 Click **OK**.

The **Task Wizard: Add Action** window is displayed.



- 13 Select **Yes** to add another action to the same task. Repeat previous steps until all actions have been added

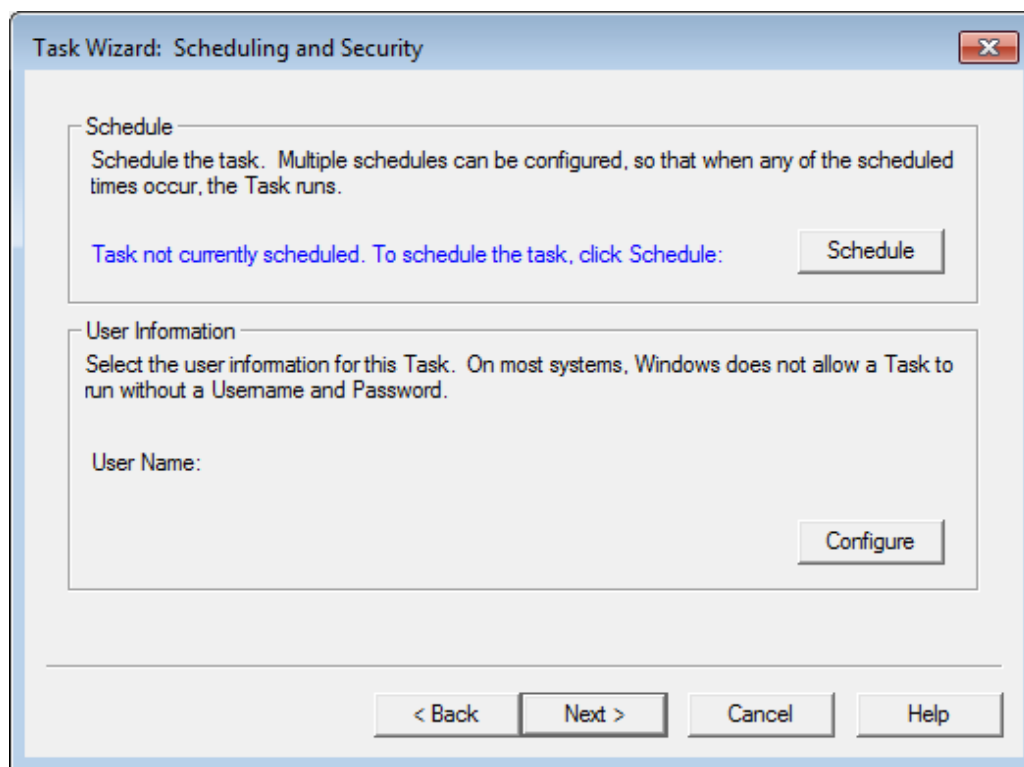
OR

Select **No** if you have finished adding actions.

- 14 Click **Next** to schedule the task and set appropriate security.

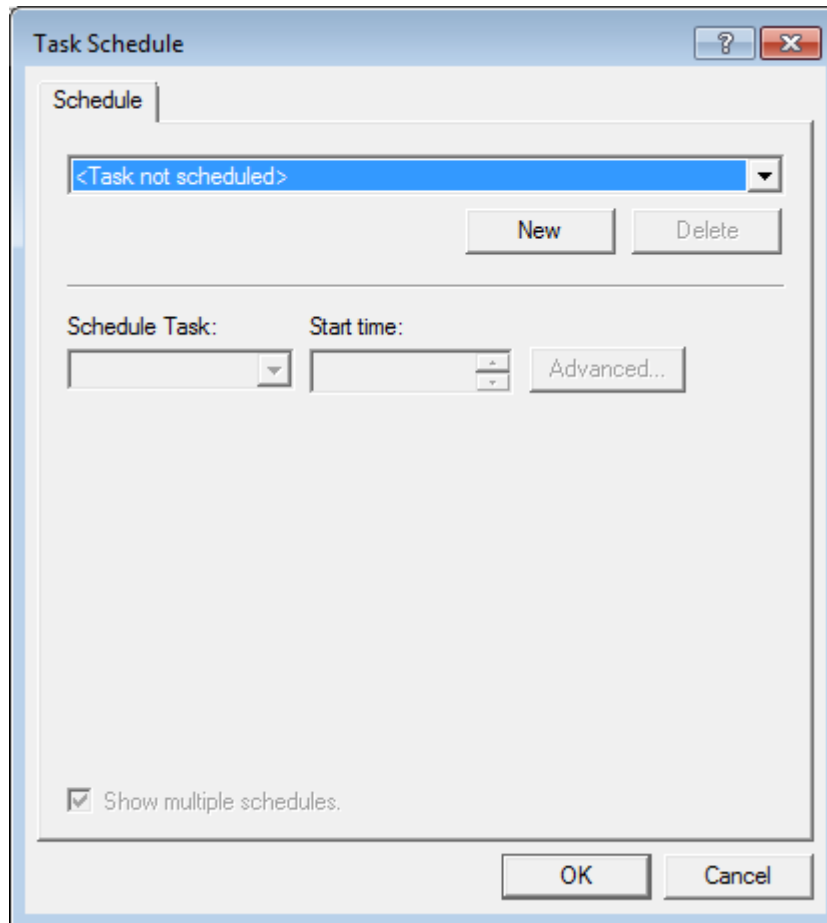
**Task Scheduler**

The **Task Wizard: Scheduling and Security** window is displayed.



**15** Click **Schedule**.

The **Task Schedule** window is displayed.



- 16 Click **New** to create a schedule for this task.

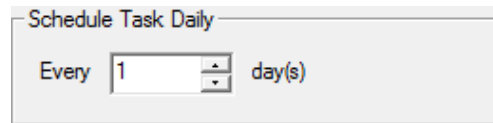
You can create multiple schedules for a single task. The **Schedule** tab reflects the new schedule that you are creating. Click the arrow for a list of schedules that have already been created for this task. This field only appears if **Show multiple schedules** is selected.

- 17 Select an option from the **Schedule Task** menu to select how frequently the task is performed.



It is strongly recommended that you do not schedule tasks to run At System Startup, At Logon, or When idle. These schedule items require user intervention.

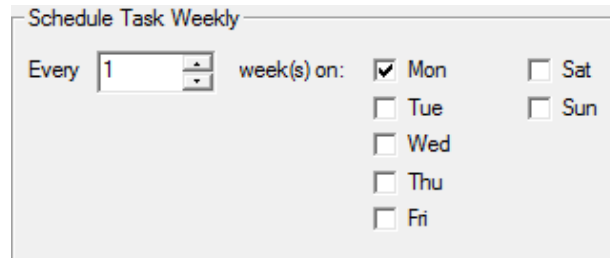
- 18 If **Daily**, **Weekly**, **Monthly**, or **Once** was selected from the **Schedule Task** menu, enter a **Start Time** for the task. Depending on the option selected from the **Schedule Task** menu the **Schedule Task** section offers different options.

**Task Scheduler**


Schedule Task Daily

Every  day(s)

Appears when Daily is chosen for the task frequency. Enter the frequency in days.

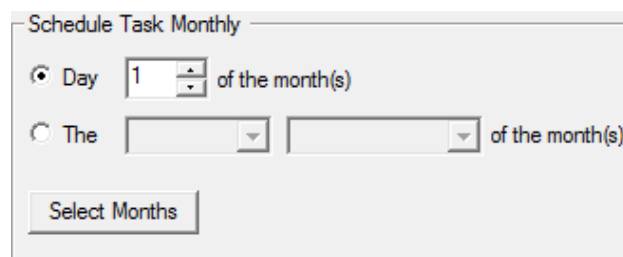


Schedule Task Weekly

Every  week(s) on:

<input checked="" type="checkbox"/> Mon	<input type="checkbox"/> Sat
<input type="checkbox"/> Tue	<input type="checkbox"/> Sun
<input type="checkbox"/> Wed	
<input type="checkbox"/> Thu	
<input type="checkbox"/> Fri	

Appears when Weekly is selected for the task frequency. Enter the frequency in weeks and select the day(s) of the week to run the task.

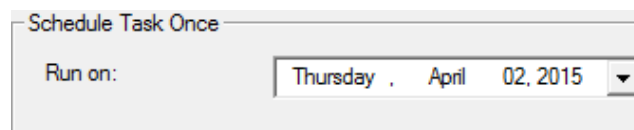


Schedule Task Monthly

☒ Day  of the month(s)

☐ The  of the month(s)

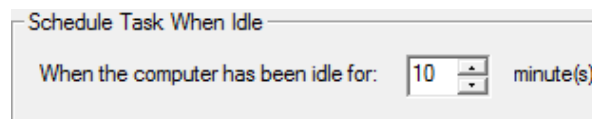
Appears when Monthly is chosen for the task frequency. Select either the Day of the month to run the task, or select The \_\_\_\_ of the month(s) and enter a week and day (e.g., the Third Friday of the month). Click Select Months to select specific month(s) to run the task.



Schedule Task Once

Run on:

Appears when Once is selected for the task frequency. Select the date to run the task.



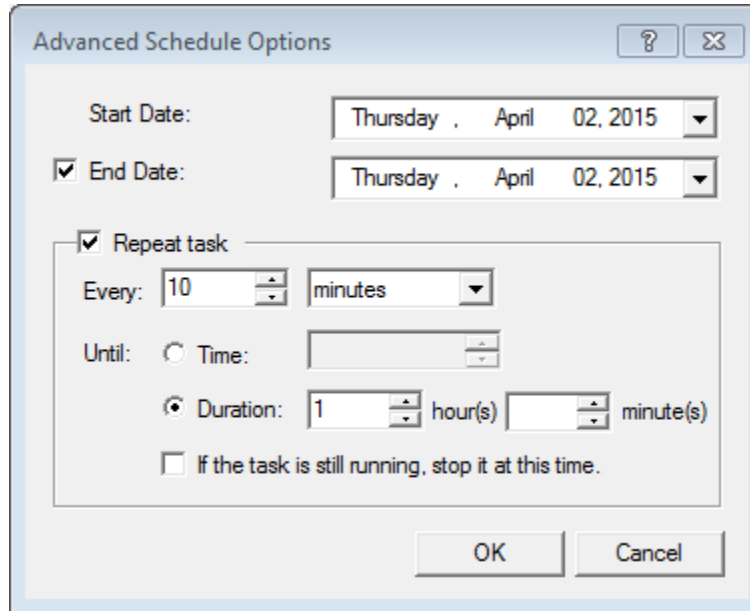
Schedule Task When Idle

When the computer has been idle for:  minute(s)

Appears when When idle is selected for the task frequency. Enter the number of minutes that the station must be idle before running the task.

- 19** To set up more than one schedule for this task, enable the **Show multiple schedules** check box.

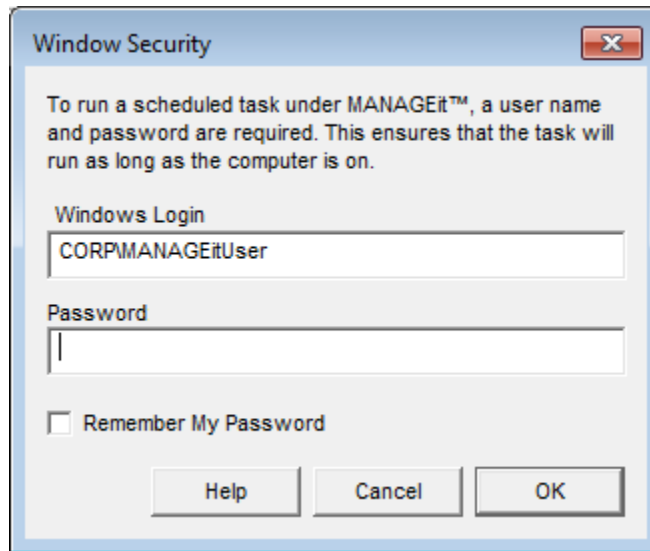
- 20 Click the **Advanced** button to access additional scheduling options.

The image shows a Windows-style dialog box titled "Advanced Schedule Options". It has a light blue title bar with a question mark icon and a close button (X). The dialog contains several fields and checkboxes. At the top, there is a "Start Date:" label followed by a date picker showing "Thursday, April 02, 2015". Below that is a checked checkbox for "End Date:" followed by another date picker showing "Thursday, April 02, 2015". Underneath is a checked checkbox for "Repeat task:". Below this checkbox is a group box containing scheduling options. It starts with "Every:" followed by a spinner box set to "10" and a dropdown menu set to "minutes". Below that is an "Until:" label with two radio buttons. The first radio button is for "Time:" followed by a time picker. The second radio button is selected and is for "Duration:" followed by a spinner box set to "1", a label "hour(s)", another spinner box, and a label "minute(s)". At the bottom of the group box is an unchecked checkbox labeled "If the task is still running, stop it at this time.". At the bottom of the dialog are "OK" and "Cancel" buttons.

- 21 Enter the **Start Date** or use the arrow to select the date from a calendar.
- 22 Select the **End Date** check box and enter the date to stop running the task or use the arrow to select the date from a calendar, if needed.
- 23 Select the **Repeat Task** check box to configure how often to repeat the task. Choose to repeat it every selected number of minutes or hours, until a selected time, or for a selected number of minutes/hours. You can also select to stop the task by selecting the If the task is still running, stop it at this time check box.
- 24 Click **OK** in the Advanced Schedule Options window, then click **OK** in the Task Schedule window. The Task Wizard: Scheduling and Security window reappears.

**Task Scheduler**

- 25 Click **Configure** to set a user name and password to run the task(s). The Window Security window appears.



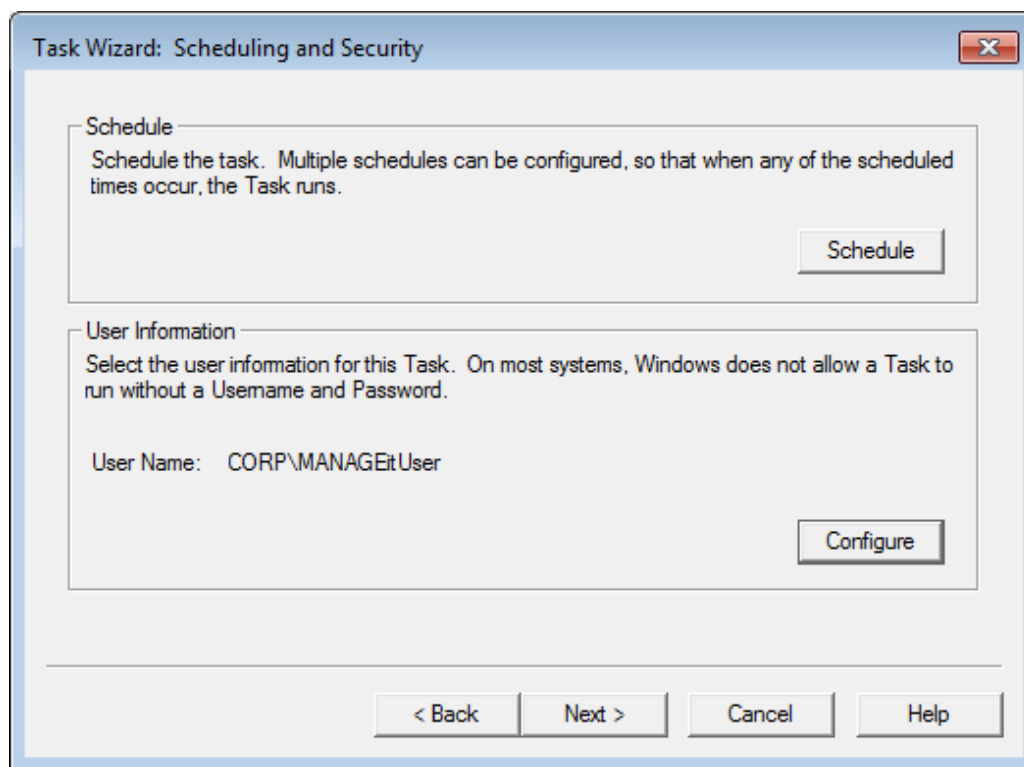
- 26 Enter a user name and password. The user identified must have access to all drives used by OCR for AnyDoc (such as the Control directory).



If you are using a networked path and a domain name is required, it must be entered with the user name for the task to run. Check with your System Administrator to determine if your network settings require a domain name.

- 27 Select the **Remember My Password** check box to carry out the task without running MANAGEit. Selecting this check box also avoids being prompted every time you update the task.
- 28 Click **OK** when finished.

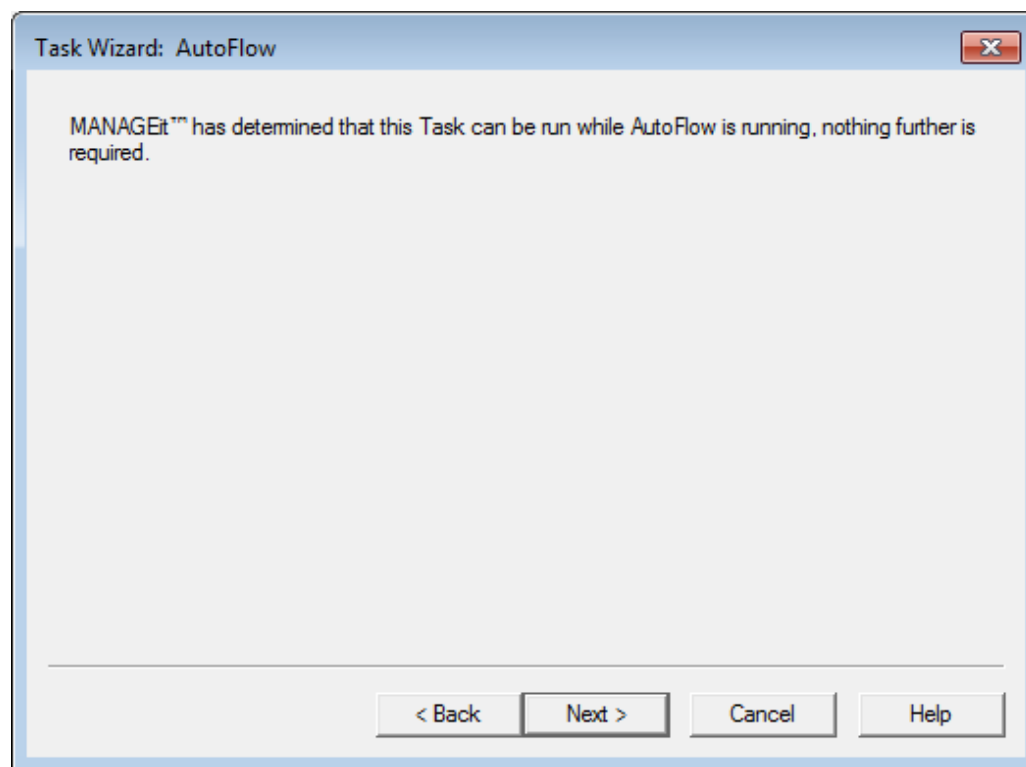
The **Scheduling and Security** window displays the configured user name.



**29** Click **Next**.

**Task Scheduler**

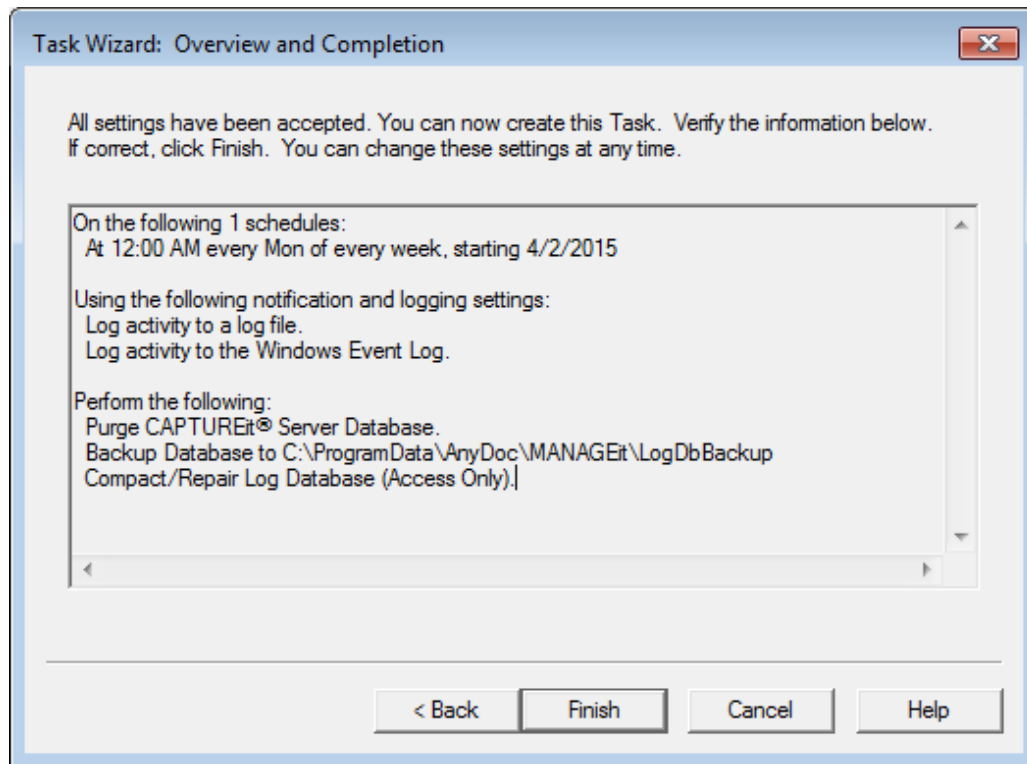
The **Task Wizard: AutoFlow** window is displayed.



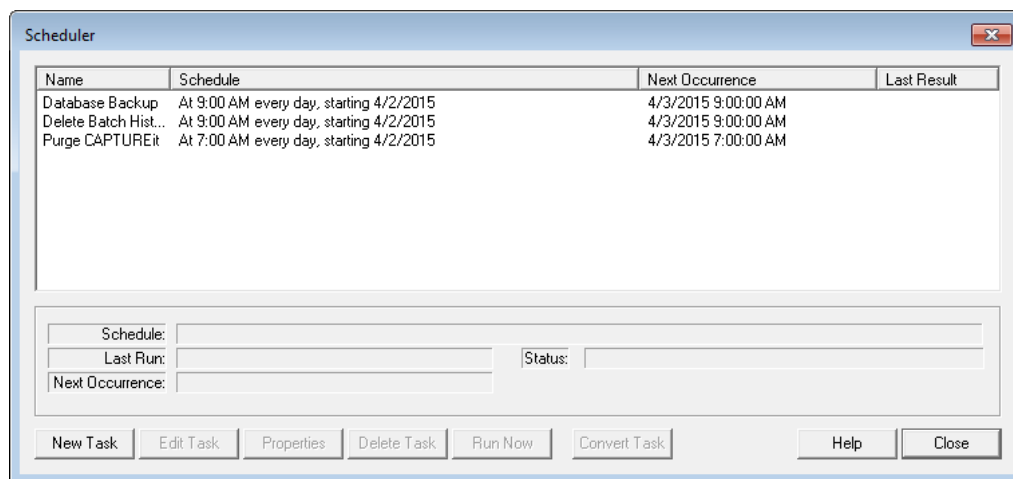
**30** Click **Next**.



The **Task Wizard: Overview and Completion** window displays information concerning the task you have just scheduled.



- 31 Click **Back** to return to edit a selected task or click **Finish** to run the task on the configured schedule. The **Scheduler** window displays the configured tasks.




## Edit a Task with the Task Wizard

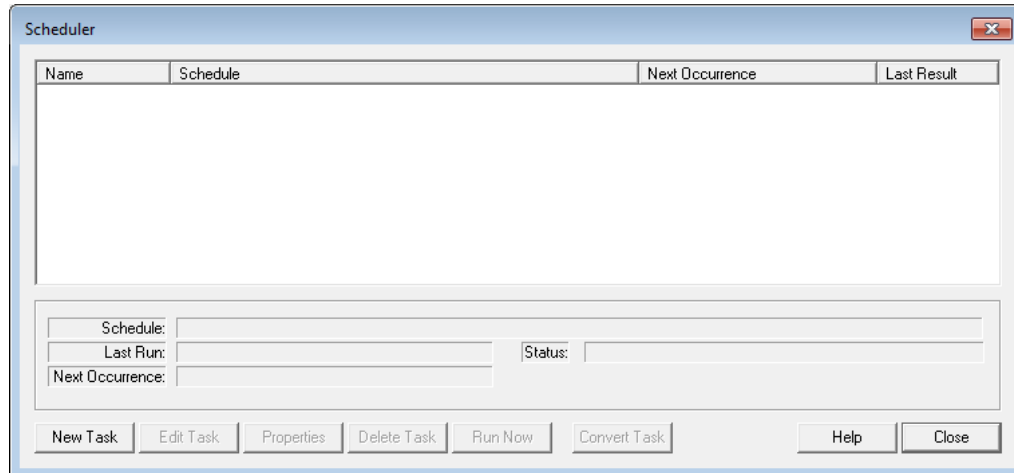
### Steps

- 1 Select **Settings** | **MANAGEit Task Scheduler**

**Task Scheduler**

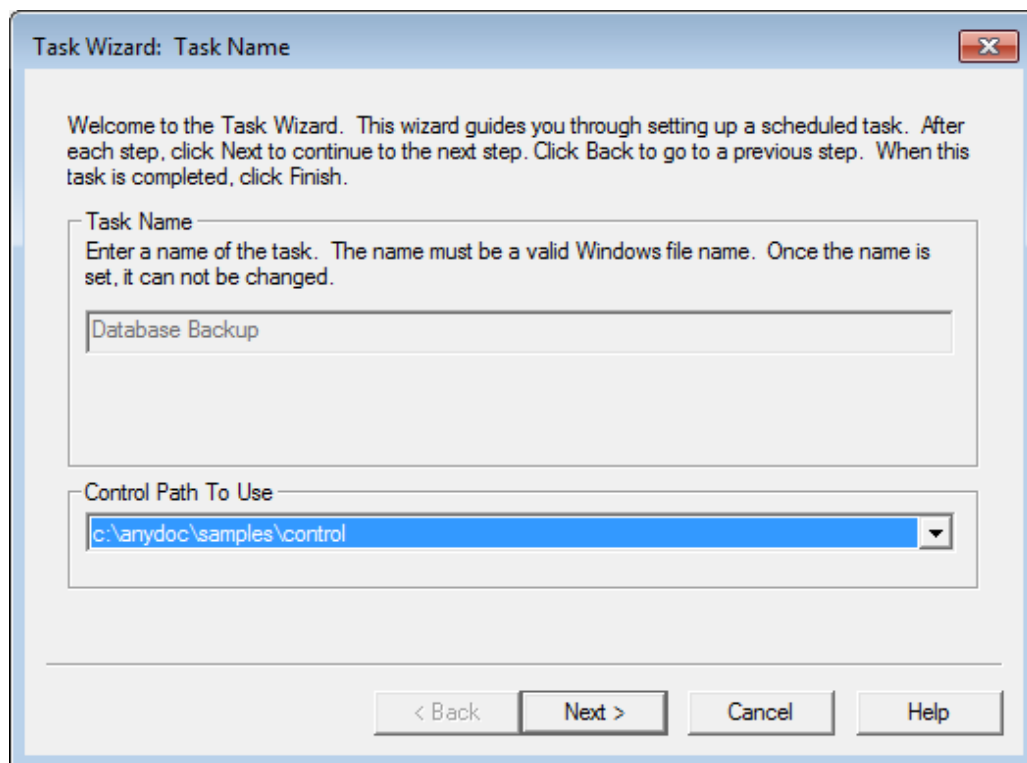
OR

Click . The Scheduler window is displayed with the scheduled tasks listed.



- 2 Select a task from the list and click **Edit Task**.

The **Task Wizard: Task Name** window is displayed with the selected task.




- 3 Use the Task Wizard to navigate through the scheduled task and make your changes. For more information, see Schedule New Tasks (page [123](#)).

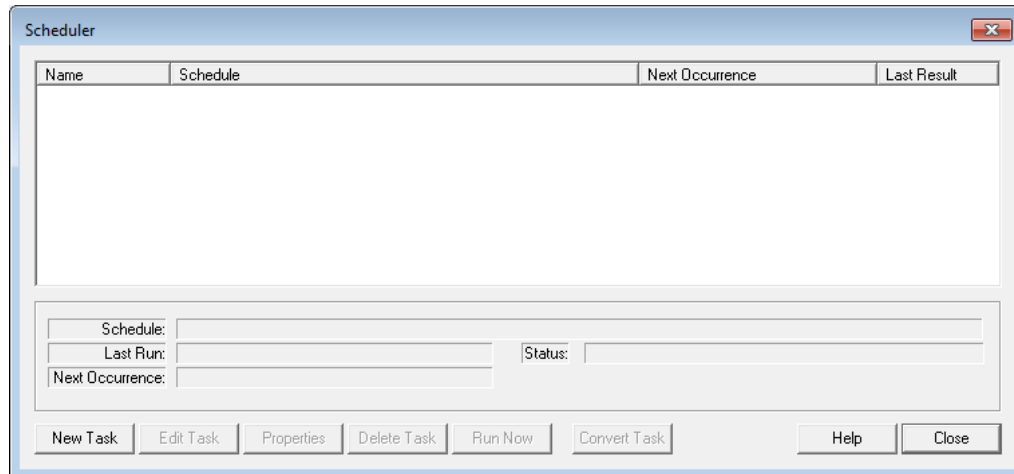
## Edit a Task with the Task Properties Window

### Steps

- 1 Select **Settings | MANAGEit Task Scheduler**

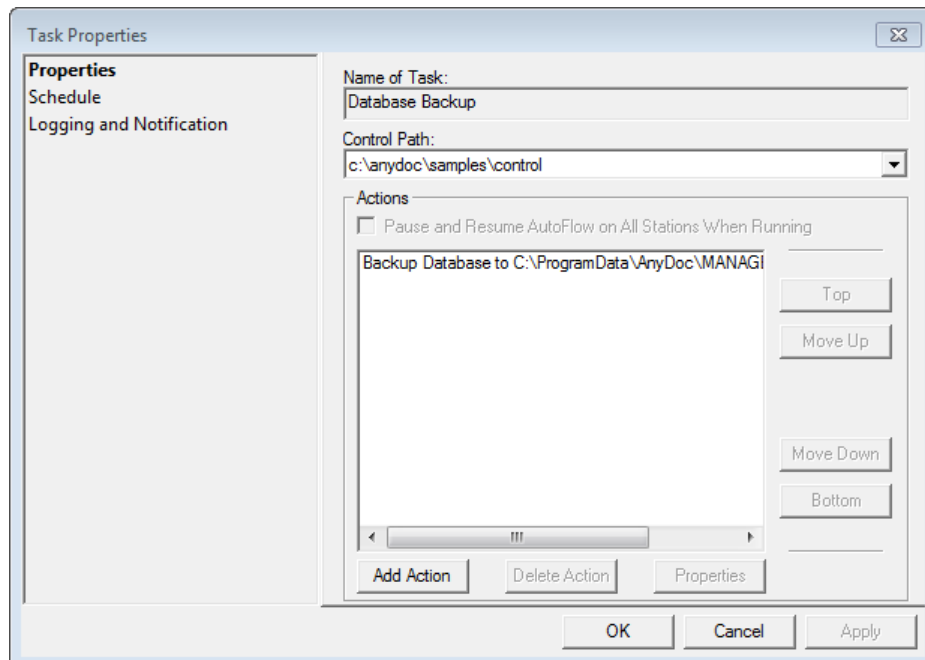
OR

Click . The Scheduler window is displayed with the scheduled tasks listed.



- 2 Select a task in the list and click **Properties**.

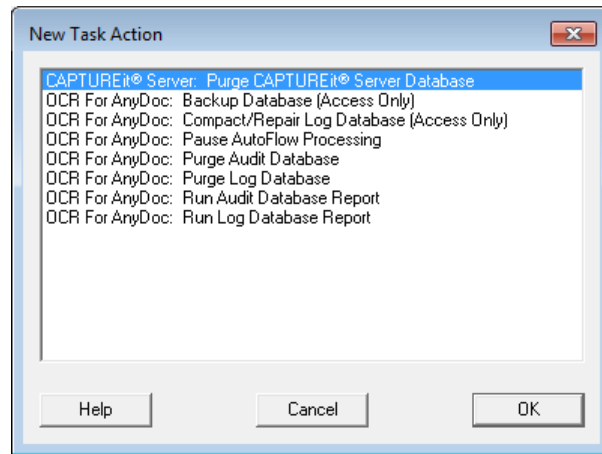
The **Task Properties** window is displayed for the selected task.



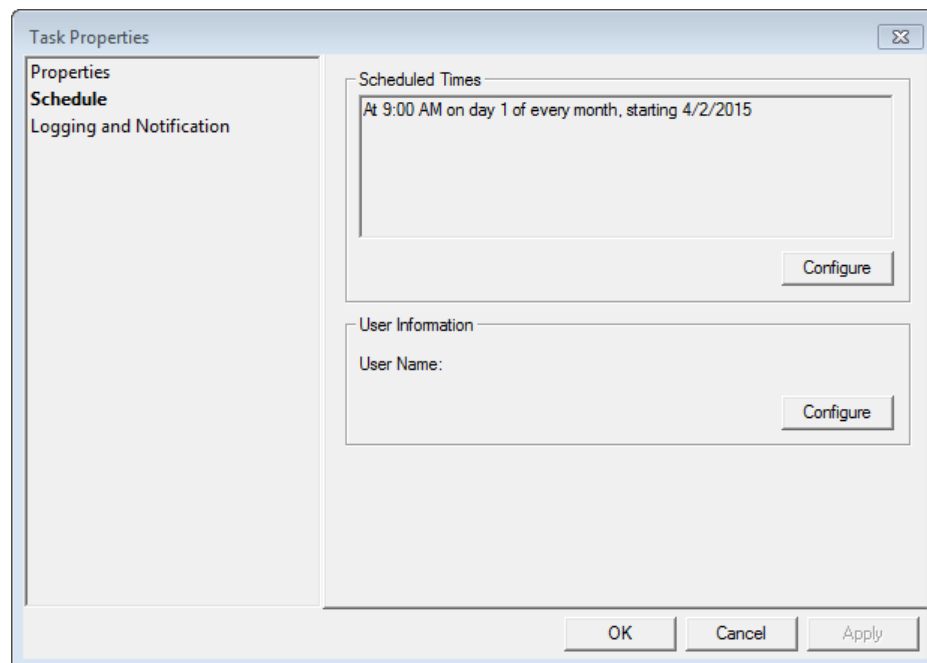
- 3 To change the **Control Path**, select a different control path.

**Task Scheduler**

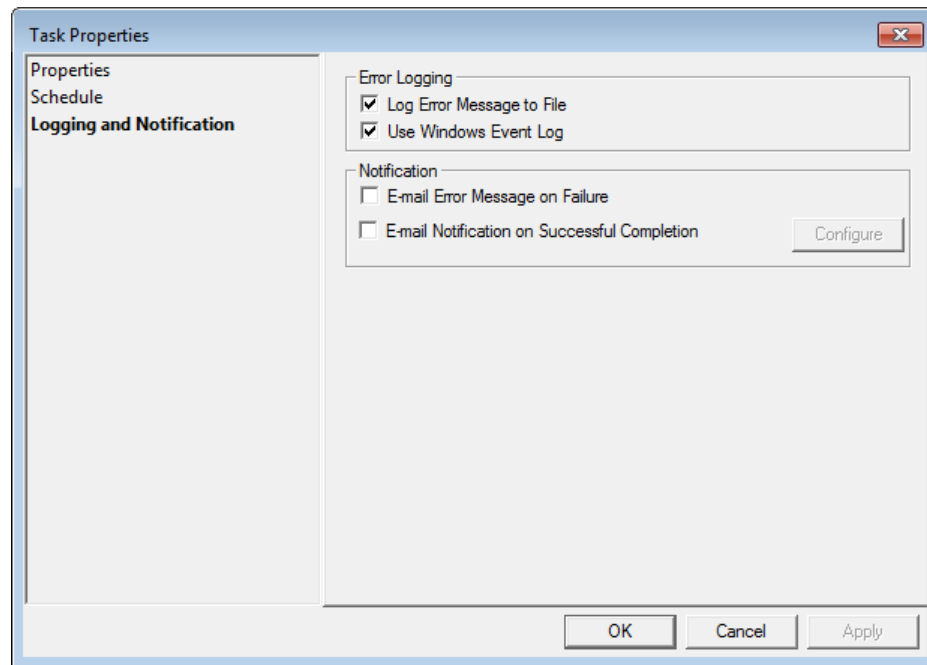
- 4 To add an action to perform, click the **Add Action** button.  
The **New Task Action** window is displayed.



- 5 Select an action or actions to add to the task and click **OK**. The additional action(s) is added to the Actions field.
- 6 Click the **Top**, **Move Up**, **Move Down** and **Bottom** buttons to arrange the order in which that actions are performed.
- 7 To delete an action, select an action from the list and click **Delete Action**.
- 8 To view or modify an action's properties, select an action from the list and click **Properties**. The properties for that action appear.
- 9 To change the task's scheduled time or user information, click the **Schedule** tab.



- 10 Click the **Configure** button in the **Scheduled Times** section to modify the date and time the task is performed.
- 11 Click the **Configure** button in the **User Information** section to add or modify a user and password.
- 12 Click the **Logging and Notification** tab.



- 13 Enable the **Log Error Message to File** check box to create text files with a trace of all steps taken by a task while performing its assigned actions.
- 14 Enable the **Use Windows Event Log** check box to create a record of a task's start and end in the Windows Event Log. Any errors occurring during processing are also recorded in the Windows Event Log. The Event Log is available from Start | Settings | Control Panel | Administrative Tools | Event Viewer. The Event Viewer allows you to see the start and end of MANAGEit tasks from other stations.
- 15 Enable the **E-Mail Error Message on Failure** check box to send e-mail to the configured recipient(s) when the scheduled task fails.
- 16 Enable the **E-Mail Notification on Successful Completion** check box to send e-mail to the configured recipient(s) when the scheduled task is successfully completed.
- 17 Click the **Configure** button to open the E-Mail Notification window to add or delete e-mail recipients. See E-Mail Alert Notifications (page 97).
- 18 Click **OK** to save the changes and close the Task Properties window.

**Task Scheduler**

## Delete Scheduled Tasks

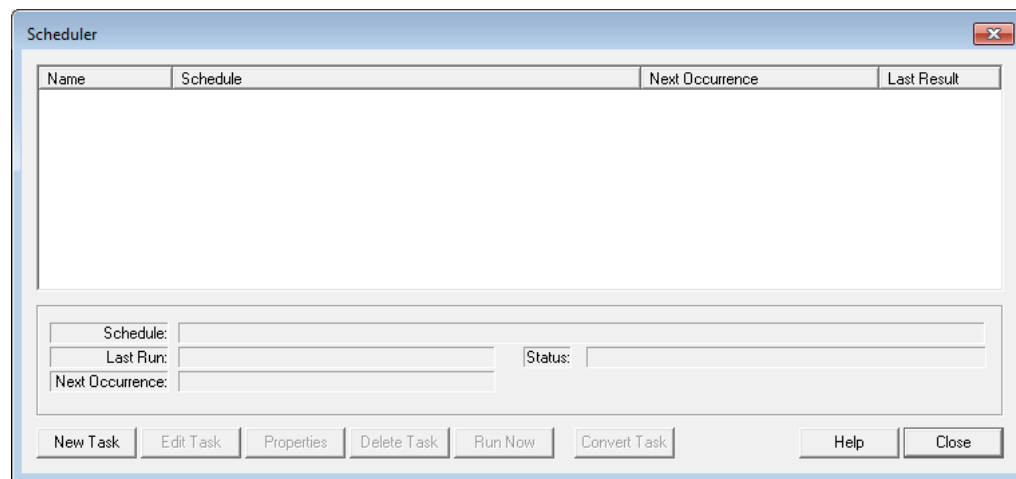
**Steps**

- 1 Select **Settings | MANAGEit Task Scheduler**

OR

Click .

The **Scheduler** window displays the scheduled tasks.



- 2 Select a task to delete and click **Delete Task**. You are prompted with a message to confirm the task deletion. Click **Yes** to delete the task.

## Convert Tasks from a Previous Version

If you upgrade to MANAGEit 15 from a previous version, you have the option of converting scheduled tasks from the earlier version of MANAGEit so that you can run the tasks in version 15.

If you have two versions of MANAGEit installed at the same time for testing purposes, once you have converted a scheduled task to version 15, you are no longer able to run the task in the earlier version of MANAGEit.

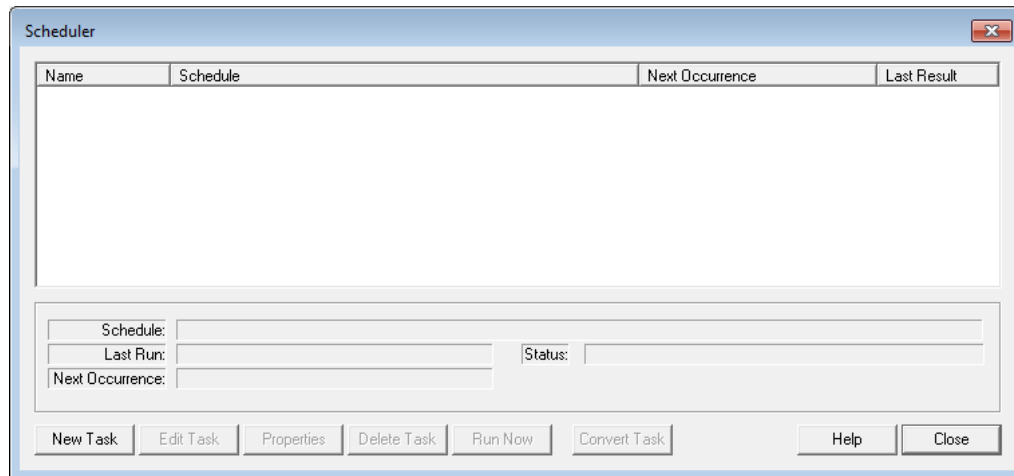
**Steps**

- 1 Select **Settings | MANAGEit Task Scheduler**

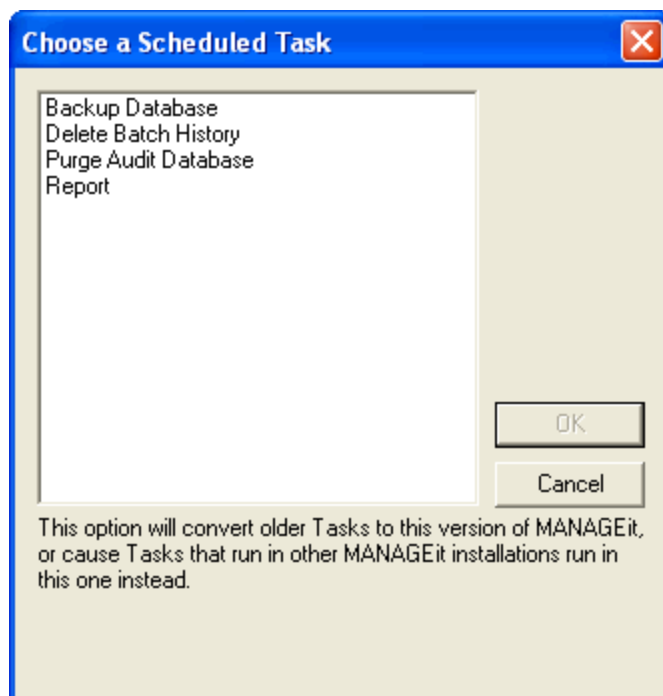
OR

Click **MANAGEit™ Task Scheduler** button, .

The **Scheduler** window displays the scheduled tasks.



- 2 Click the **Convert Task** button. The **Choose a Scheduled Task** window displays all scheduled tasks from a previous version of MANAGEit.



- 3 Select a task to convert and click **OK**.  
The task is converted and is displayed in the **Scheduler** window.

# Chapter 11

---

## Access OCR for AnyDoc Form Family Management

MANAGEit provides access to OCR for AnyDoc Form Family Management, allowing you to create and configure form families used for batch processing.

A form family is one or more master form templates grouped together for batch processing. Forms can only be processed against a template after the template has been added to a form family. Form families can be customized with a variety of settings. The same template can be included in more than one form family. For information about creating templates, see the OCR for AnyDoc *Template Design Reference*.

Examples of what might be in a form family:

- A batch of invoices that must be batch balanced.
- A mortgage folder that has pages to be processed containing information that will be used to index other pages in the folder within an image retrieval system.


Examples of form family options:

- Archive Images: Output the images into single page or multipage TIFF or PDF format.
- Batch Balance Controls: Balance the forms within each batch to a predetermined numeric value.
- Header Records: Create a header record in the output file with system defined, static, or dynamic information.
- Enhanced Form Identification: Include images in the batch that are not processed (Attachments), propagate indexes from one page to many within a batch, rotate images automatically for identification and reorder pages that are out of sequence.
- Specify Directory Structure: Define the directory structure for the ASCII output file and archived images.
- Verification: Batch Verification by one or many operators, validating the data for output to the ASCII file.

Form Family Management is used to create form families, assign templates to form families and to configure settings for each form family.



**To access the Form Family Management window:**


- Select **Settings | OCR for AnyDoc® Form Family Management** or click the **Form Families** button,  on the Management toolbar.

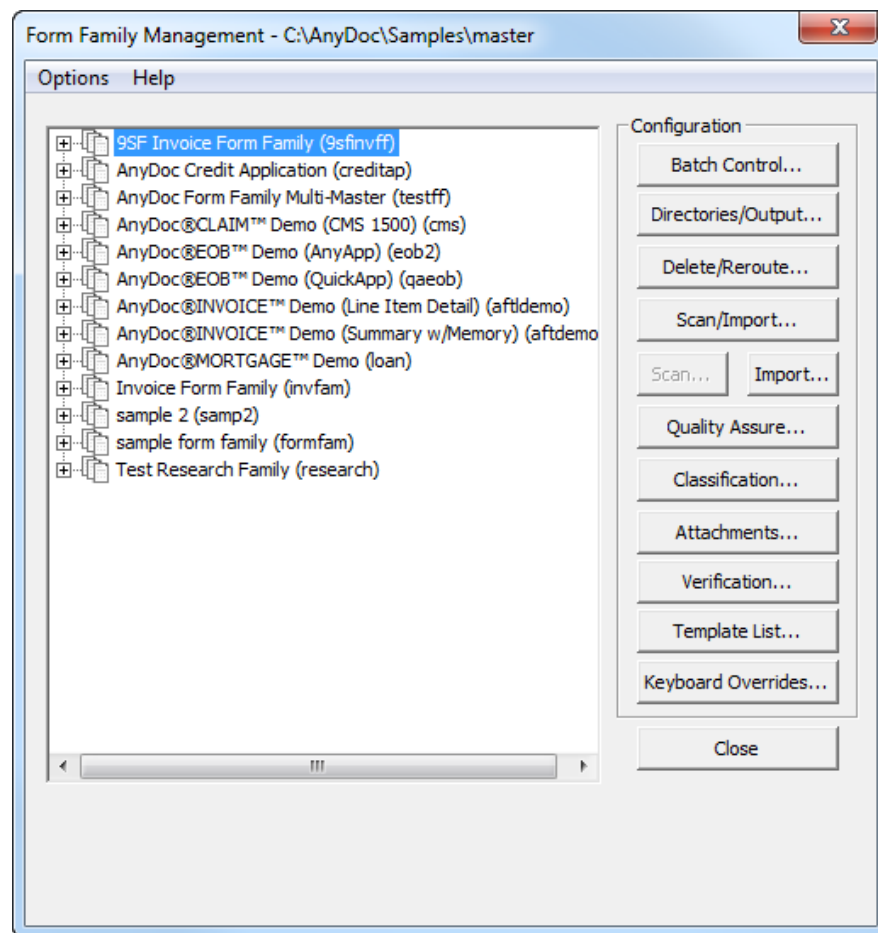
## Create a New Form Family

A new form family can be created for an existing template through the Options menu on the Form Family Management window.

### Steps

- 1 Select **Settings | OCR for AnyDoc® Form Family Management**.  
OR

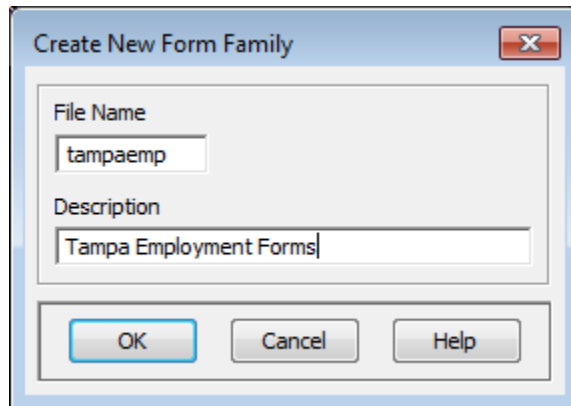
Click the **Form Families** button,  on the Management toolbar. The Form Family Management window is displayed.



- 2 Select **Options | New**.

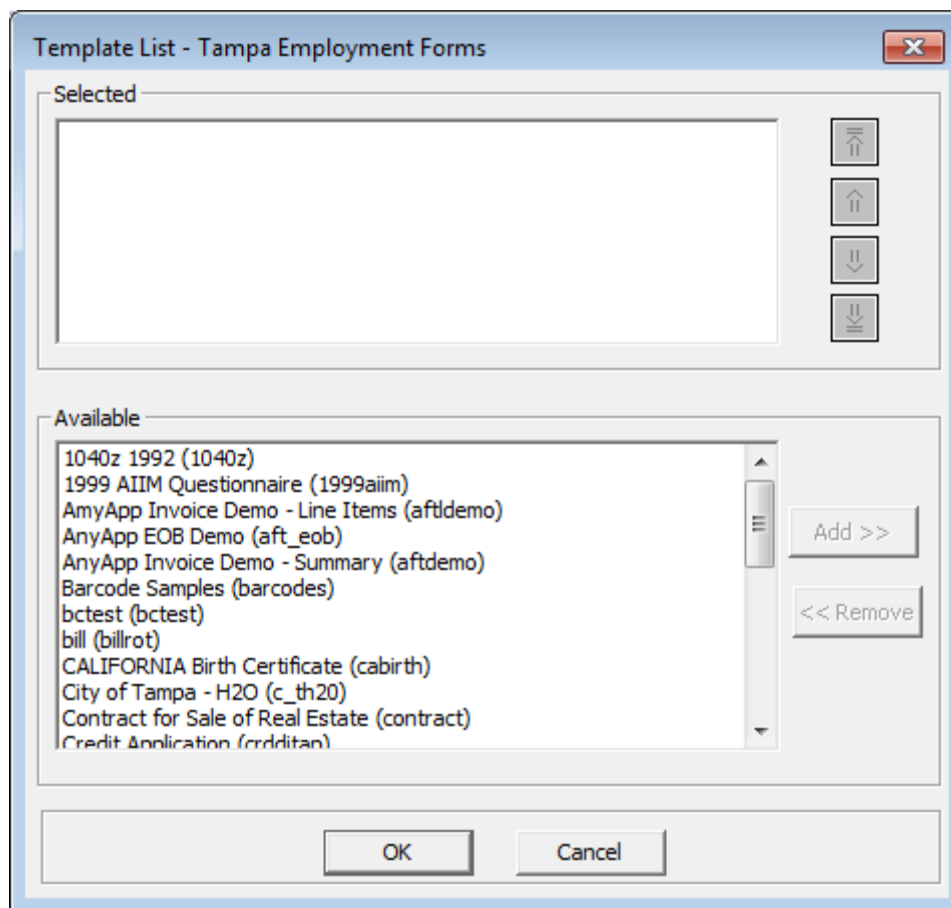
**Access OCR for AnyDoc Form Family Management**

The Create New Form Family window is displayed.



The 'Create New Form Family' dialog box is shown. It has a title bar with a close button (X). Inside, there are two text input fields: 'File Name' with the text 'tampaemp' and 'Description' with the text 'Tampa Employment Forms'. At the bottom, there are three buttons: 'OK', 'Cancel', and 'Help'.

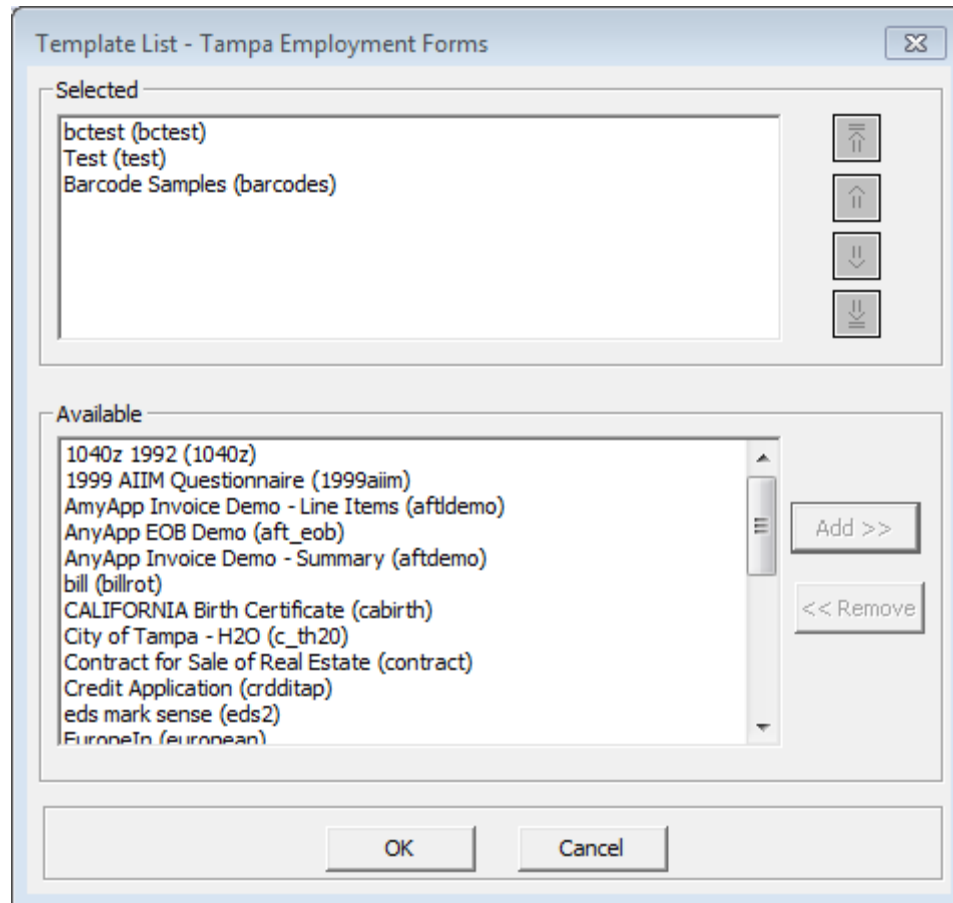
- 3 Enter a **File Name** of up to eight characters for the new form family.
- 4 Enter a **Description** for the new form family.
- 5 Click **OK**. The Template List window is displayed.



The 'Template List - Tampa Employment Forms' dialog box is shown. It has a title bar with a close button (X). The dialog is divided into two main sections: 'Selected' and 'Available'. The 'Selected' section is empty. The 'Available' section contains a list of templates: 1040z 1992 (1040z), 1999 AIIM Questionnaire (1999aiim), AmyApp Invoice Demo - Line Items (aftldemo), AnyApp EOB Demo (aft\_eob), AnyApp Invoice Demo - Summary (aftdemo), Barcode Samples (barcodes), bctest (bctest), bill (billrot), CALIFORNIA Birth Certificate (cabirth), City of Tampa - H2O (c\_th20), Contract for Sale of Real Estate (contract), and Credit Application (crdditan). To the right of the 'Available' list are four buttons: 'Add >>', '<< Remove', and two buttons with up/down arrows. At the bottom of the dialog are 'OK' and 'Cancel' buttons.

## Access OCR for AnyDoc Form Family Management

- 6 Select a template from the **Available** field and click **Add**. The template is added to the Selected field, which displays the templates assigned to the selected form family.



- 7 To change the order of the templates within the form family, select a template in the list and use the arrow buttons on the right to move the template within the list.



When a form family has multiple associated templates, if you know that during batch processing there are more forms matching one template than any of the others, place that template first in the list for the form family.

- 8 To remove a template from the Selected field, highlight the template to be removed and click **Remove**.
- 9 Click **OK** to close the Template List window. The new form family is added to the Options field.


## Delete a Form Family

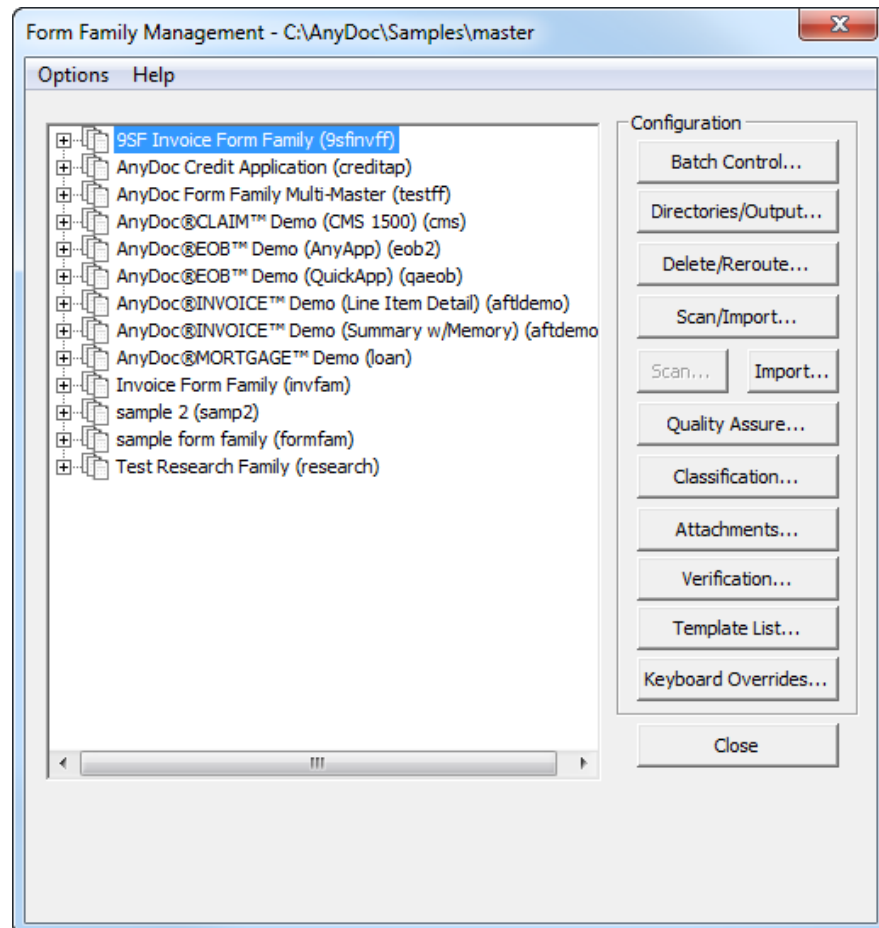
### Steps

- 1 Select **Settings | OCR for AnyDoc® Form Family Management**.

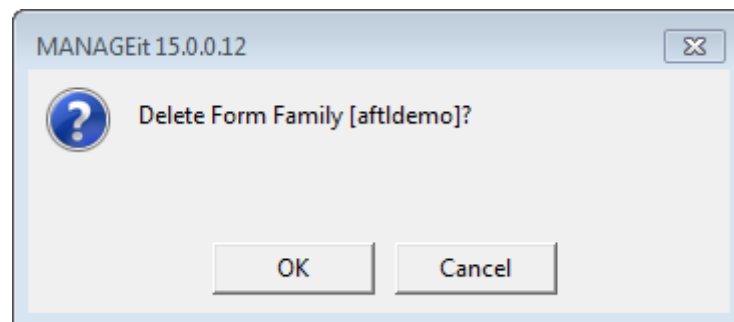
**Access OCR for AnyDoc Form Family Management**

OR

Click the **Form Families** button,  on the Management toolbar. The Form Family Management window is displayed.



- 2 Select the form family to delete.
- 3 Select **Options | Delete**. A confirmation window is displayed.




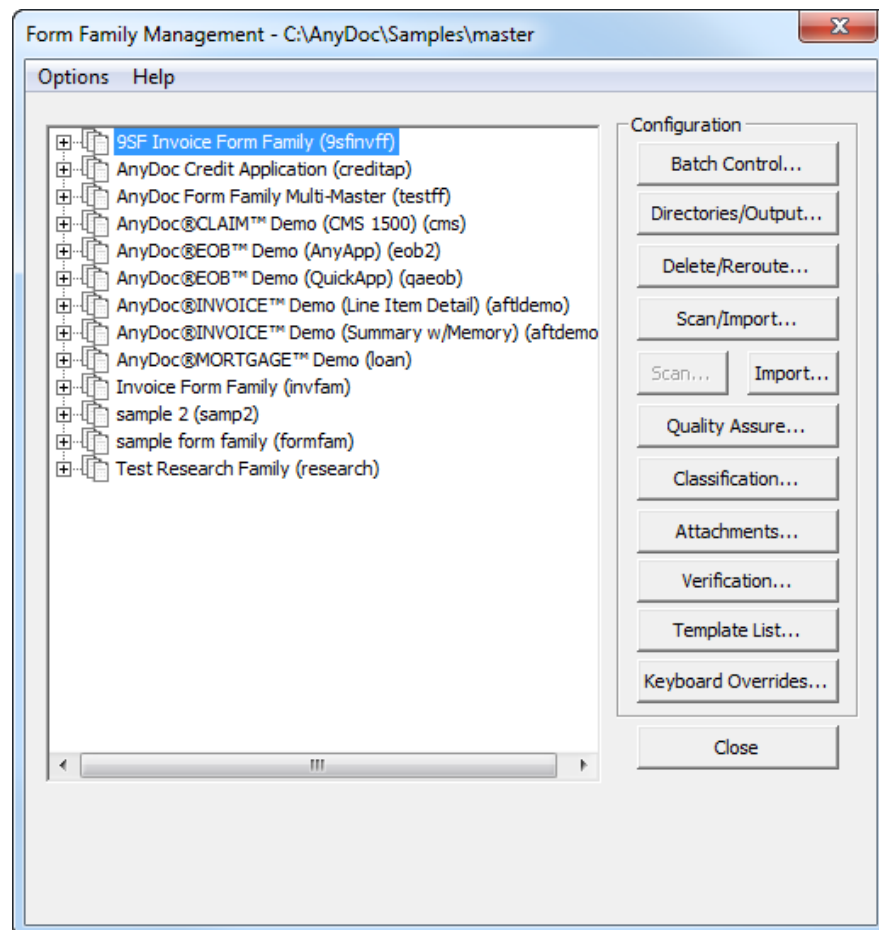
- 4 Click **OK**.

## Save Form Family Changes

### Steps

- 1 Select **Settings | OCR for AnyDoc® Form Family Management**.  
OR

Click the **Form Families** button,  on the Management toolbar.  
The **Form Family Management** window is displayed.



- 2 Make changes to the form family.
- 3 Select **Options | Save**.
- 4 Click **Close**.


## Copy a Form Family

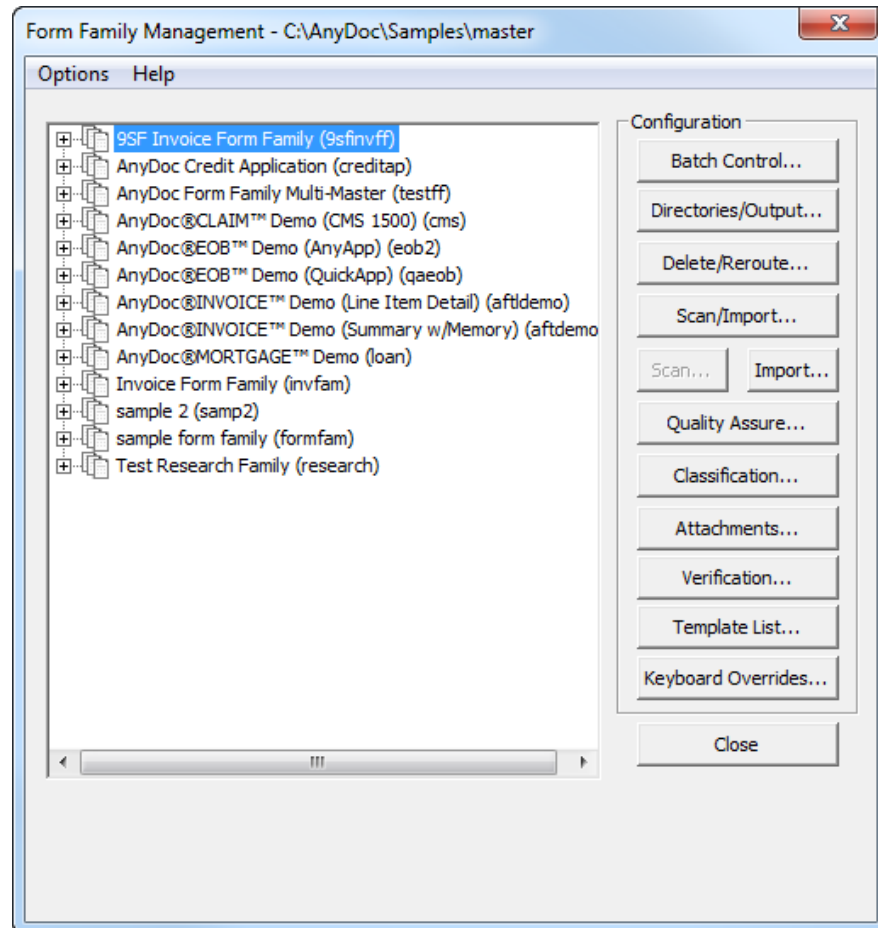
### Steps

**Access OCR for AnyDoc Form Family Management**

- 1 Select **Settings | OCR for AnyDoc® Form Family Management**.

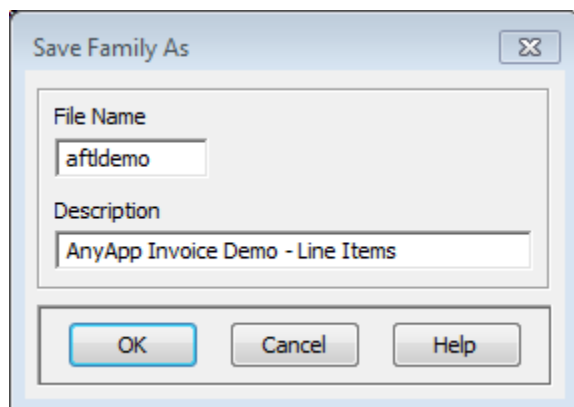
OR

Click the **Form Families** button,  on the Management toolbar. The Form Family Management window is displayed.



- 2 Highlight the form family to be copied.

- 3 Select **Options | Save As**. The Save Family As window is displayed.

A screenshot of the 'Save Family As' dialog box. The dialog has a title bar with a close button (X). Inside, there are two text input fields. The first field is labeled 'File Name' and contains the text 'aftdemo'. The second field is labeled 'Description' and contains the text 'AnyApp Invoice Demo - Line Items'. At the bottom of the dialog, there are three buttons: 'OK', 'Cancel', and 'Help'. The 'OK' button is highlighted with a blue border.


- 4 Change the **File Name** and **Description** field and click **OK**. The new form family is added to the Options field in the Form Family Management window.

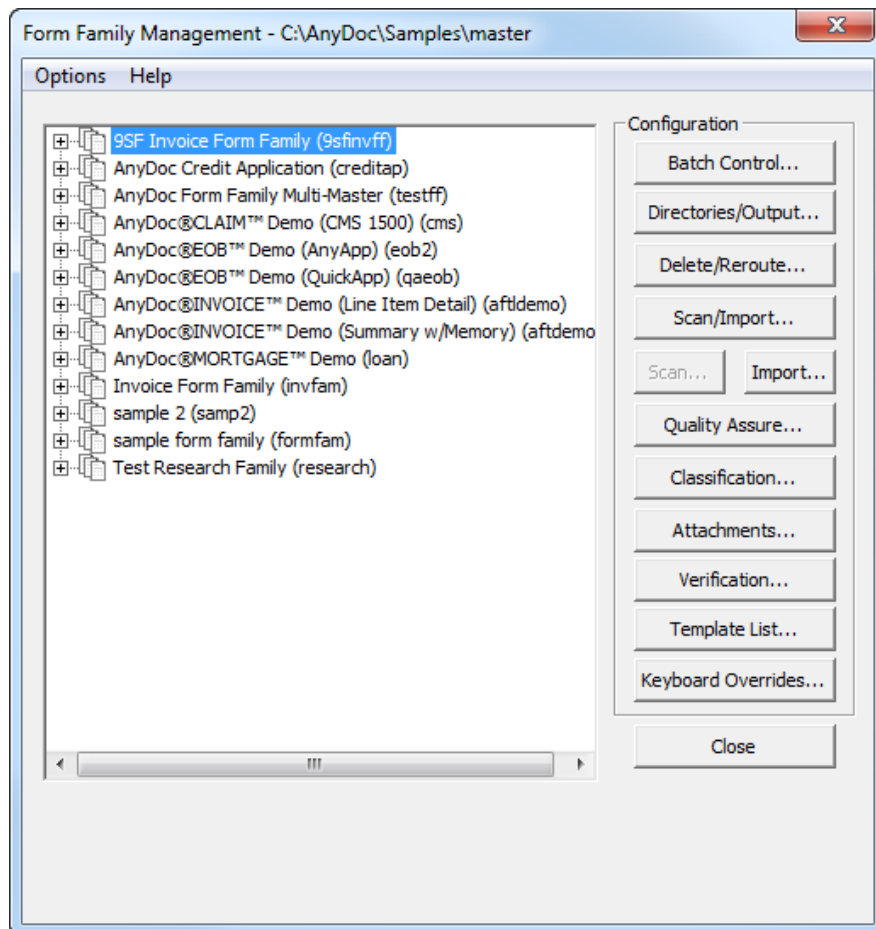
## Change a Form Family's Description

### Steps

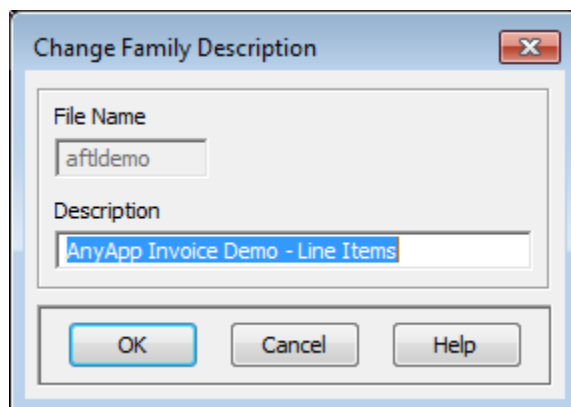
- 1 Select **Settings | OCR for AnyDoc® Form Family Management**.  
OR

**Access OCR for AnyDoc Form Family Management**

Click the **Form Families** button,  on the Management toolbar. The Form Family Management window is displayed.



- 2 Select a form family.
- 3 Select **Options** | **Change Description**. The Change Family Description window is displayed.






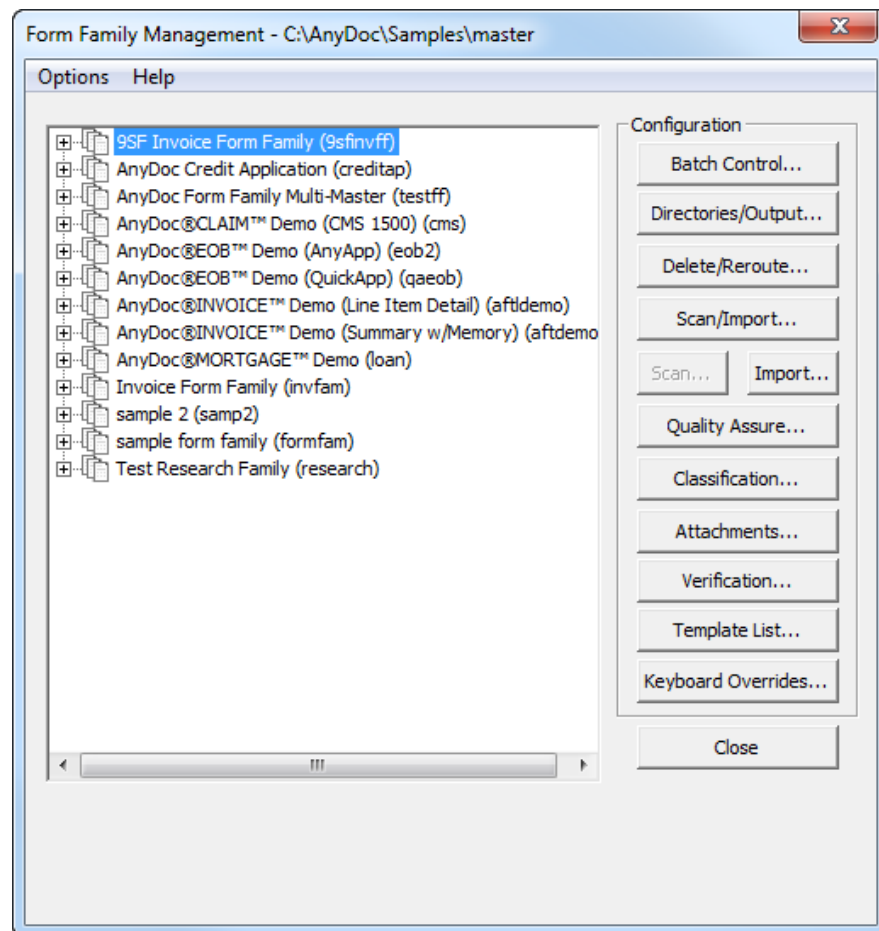
- 4 Change the **Description** and click **OK**. The updated description is displayed in the Options field of the Form Family Management window.

## Password Protect a Form Family

### Steps

- 1 Select **Settings | OCR for AnyDoc® Form Family Management**.  
OR

Click the **Form Families** button,  on the Management toolbar.  
The **Form Family Management** window is displayed.



- 2 Select the form family to password protect.
- 3 Select **Options | Set Password**.

**Access OCR for AnyDoc Form Family Management**

The **Form Family Password** window is displayed.

A screenshot of the 'Form Family Password' dialog box. It has a title bar with a close button (X). The main area contains a label 'Enter Family Password' above a text input field. The input field contains six asterisks (\*\*\*\*\*). Below the input field are three buttons: 'OK', 'Cancel', and 'Help'.

- 4 Enter a form family password in the field provided and click **OK**.

The **Form Family Password** window is displayed.

A screenshot of the 'Form Family Password' dialog box. It has a title bar with a close button (X). The main area contains a label 'Reenter Family Password' above a text input field. The input field contains six asterisks (\*\*\*\*\*). Below the input field are three buttons: 'OK', 'Cancel', and 'Help'.

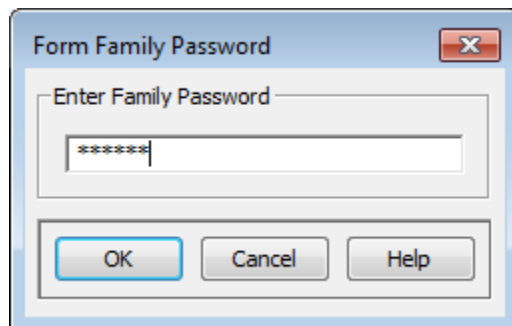
- 5 Reenter the form family password in the field provided and click **OK**.

## Access a Password Protected Form Family

### Steps

- 1 Select the form family to access from the **Work Flow Manager**.

The **Form Family Password** window is displayed.

A screenshot of the 'Form Family Password' dialog box. It has a title bar with a close button (X). The main area contains a label 'Enter Family Password' above a text input field. The input field contains six asterisks (\*\*\*\*\*). Below the input field are three buttons: 'OK', 'Cancel', and 'Help'.

- 2 Enter the correct password in the **Enter Family Password** field.


**Access OCR for AnyDoc Form Family Management**

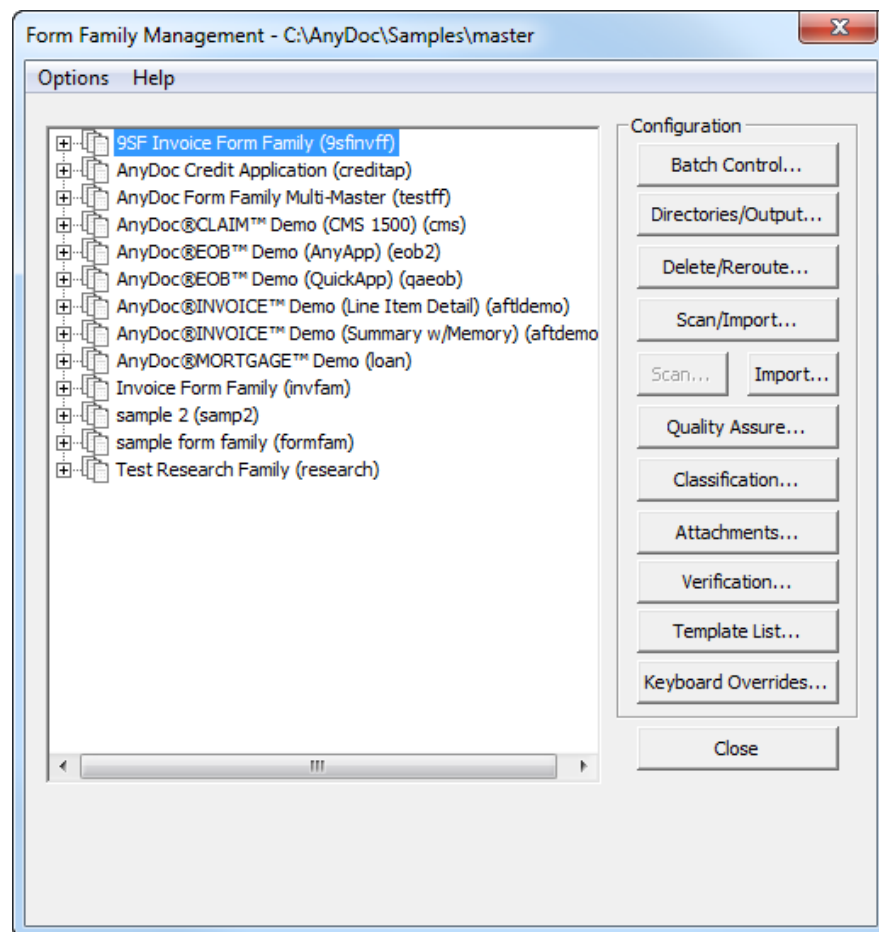
The **Form Family Management** window is displayed and all buttons on the right side are available. Entering an incorrect password or not entering one at all opens the Form Family Management window but the buttons on the right are unavailable (grayed out).

- 3 Click **OK**.

## Access the Template List

### Steps

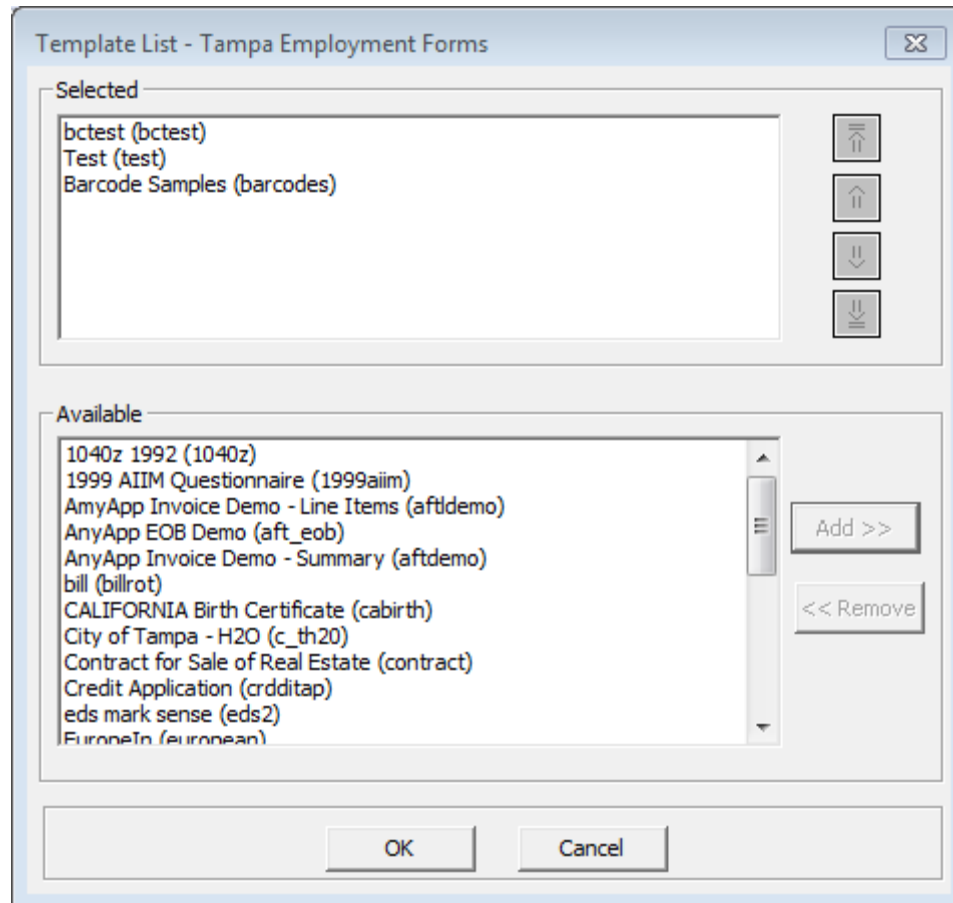
- 1 Select **Settings | OCR for AnyDoc Form Family Management** or click the **Form Families** button,  on the Management toolbar. The **Form Family Management** window is displayed.



- 2 Select the form family to view the list of associated templates.

**Access OCR for AnyDoc Form Family Management**

- 3 Click the **Template List** button, or right-click the form family and select **Template List**. The **Template List** window is displayed.



All templates associated with the form family appear in the **Selected** field. To add, remove, or change the order of the form families see [Create a New Form Family](#) (page [247](#)).

## Change Form Family Directories

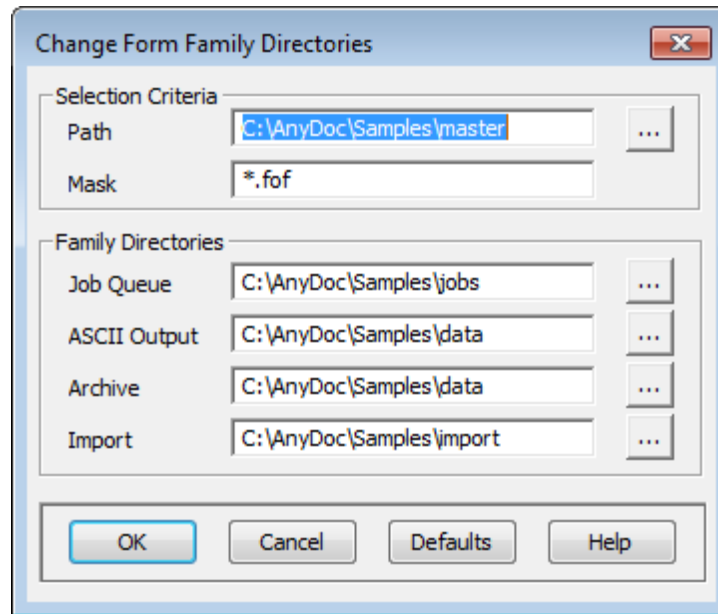
The Change Family Directories feature provides the ability to change the base path to one or more of the directories associated with one or more form family, e.g., the path to the Jobs directory, etc.





### Steps

- 1 From the **Form Family Management** window, select a form family.

**Access OCR for AnyDoc Form Family Management**

- 2 Select **Options | Change Family Directories**. The Change Form Family Directories window is displayed.



- 3 Enter the **Path** to the form family or families to change.
- 4 Enter the file name of the form family to change in the **Mask** field. This defaults to \*.fof, meaning all form families in the specified path. To change one form family, enter the form family file name (e.g., name.fof).
- 5 Enter a new path in the **Job Queue** field or click  to browse to the location.
- 6 Enter a new path in the **ASCII Output** field or click  to browse to the location.
- 7 Enter a new path in the **Archive** field or click  to browse to the location.
- 8 Enter a new path in the **Import** field or click  to browse to the location.
- 9 Click **OK**.

## Batch Control Settings

The **Batch Control** window provides the ability to set a number of batch level options, including:

- Use of the Log Database
- Batch equations
- DocSet equations
- Batch headers

---

**Access OCR for AnyDoc Form Family Management**

- Document control expressions

A batch equation can be used to define a mathematical relationship between the total values of zones on different templates in the same form family. Batch equations can be used for two purposes:

- To ensure the accuracy of recognition and Verification results.  
Values in every form family processed batch must add up to a pre-defined total. The total is either entered by an operator when the batch is scanned or imported, or it is printed on a form that is scanned or imported with the batch.  
Using a batch equation in this way triggers the Balancing Verification phase of batch processing. Balancing Verification takes place after all other Verification phases. It checks the values in the batch against the specified total and prompts the operator to correct the data if the equation does not balance.
- To calculate values and output them in a header expression or document control.  
This kind of Batch Equation does not trigger Balancing Verification; instead, it calculates a total from the batch data to output to an ASCII file.

A DocSet Equation is much like a Batch Equation, except it is for each document set in a batch, rather than for the whole batch. A DocSet Equation can be used to define a mathematical relationship between the total values of zones on different templates in the same document set. DocSet Equations can be used for two purposes:

- To ensure the accuracy of recognition and Verification results.  
Values in every form family processed document set processed must add up to a total that appears somewhere in the document set.  
Using a docset equation in this way triggers the Balancing Verification phase of batch processing. Balancing Verification takes place after all other Verification phases. It checks the values in the batch against the specified total and prompts the operator to correct the data if the equation does not balance.
- To calculate values and output them in a Document Control.  
This kind of DocSet Equation does not trigger Balancing Verification. It calculates a total from the batch data to output to an ASCII file.

Performance options can be set in the Batch Control | Performance tab. These options affect processing speed and determine how and when certain events occur during processing. The default settings are designed to provide the best performance and should not normally be changed.

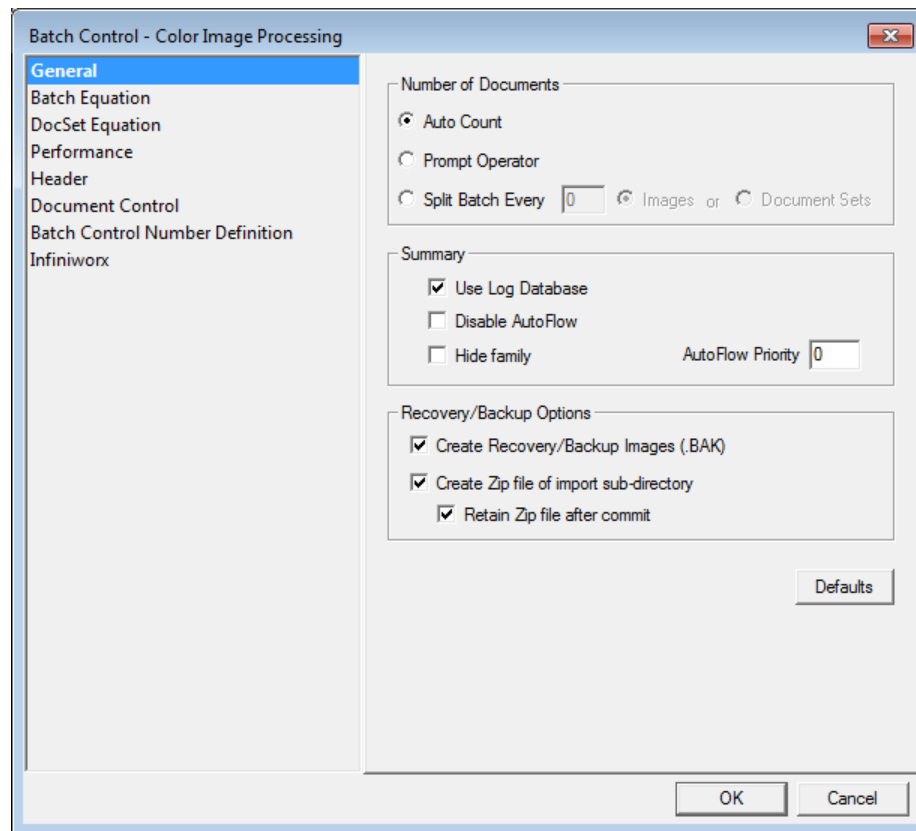
Another batch control option is a header record can be included in the ASCII output file. This is a single record that is displayed at the beginning of the output for each batch. A header record can contain system defined control fields, static literal text, and information entered by the operator at Scan/Import time.

**Access OCR for AnyDoc Form Family Management**

The Document Control tab allows ASCII data, such as the date, time, operator, or batch information, to be included in every output record for a Master Form Template. OCR for AnyDoc provides a number of pre-defined fields and allows user-defined fields. Document controls defined at the Form Family level are output either once for every form or once for every record. Document controls can be defined for individual templates in the Output Parameters for each template. In Form Family Management, document controls can also be defined to apply to attachments (in the Attachment Page Settings window), or to deleted images (in the Delete/Reroute Settings window).

A batch control number can be configured to output in either a batch header or document control expression.

From the **Form Family Management** window (**Settings | OCR for AnyDoc® Form Family Management**), click **Batch Control** to access the **Batch Control** window for a selected form family.




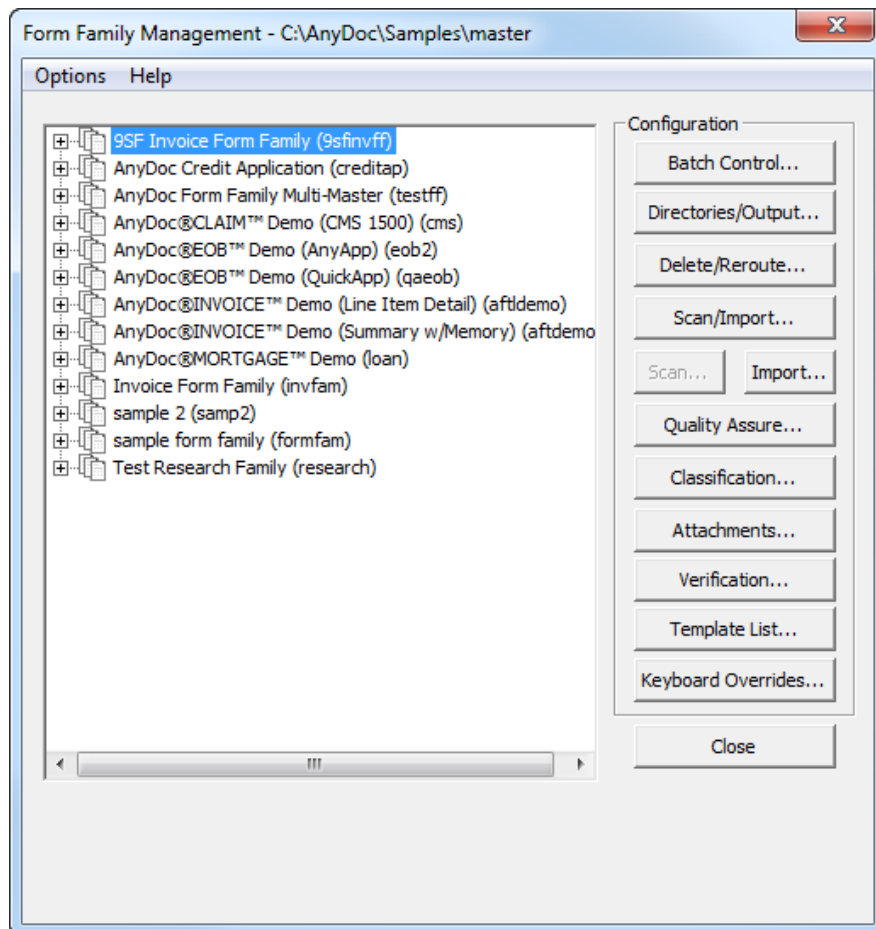
## Batch Control Parameters

### Steps

- 1 Select **Settings | OCR for AnyDoc® Form Family Management**.  
OR

**Access OCR for AnyDoc Form Family Management**

Click the **Form Families** button,  on the Management toolbar. The Form Family Management window is displayed.

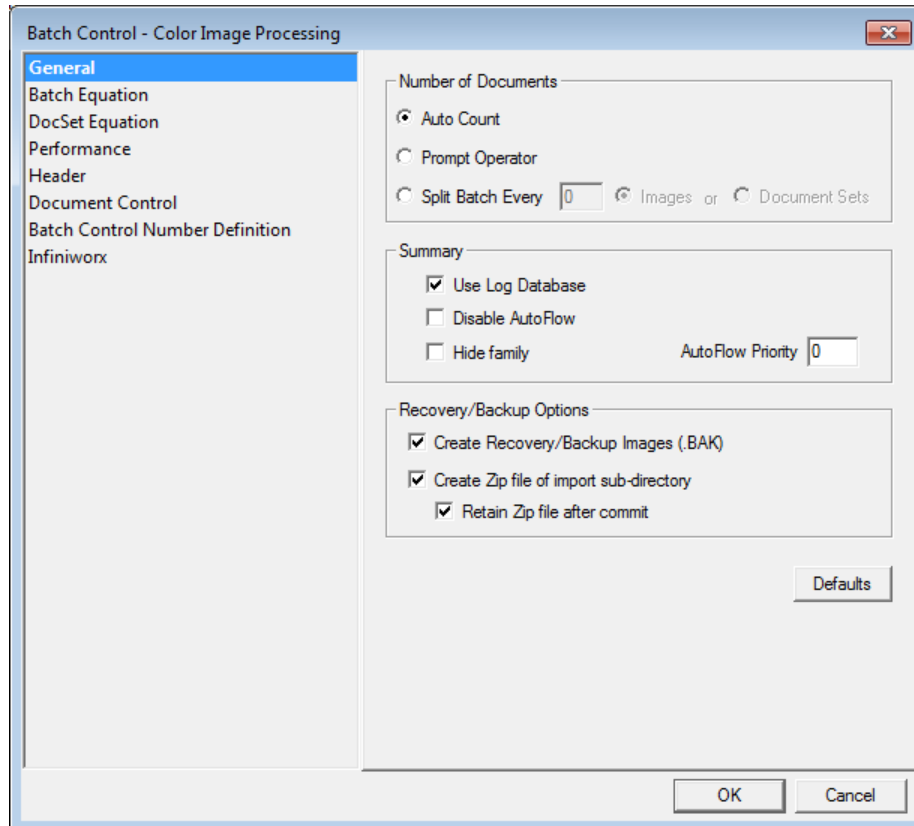


- 2 Highlight a form family to set batch control settings and click the **Batch Control** button  
OR



**Access OCR for AnyDoc Form Family Management**

Highlight a form family to set batch control settings, right-click and select **Configure | Batch Control**. The Batch Control window for the selected form family is displayed.



- 3 Select a radio button in the **Number of Documents** section to specify how documents are divided into batches. Options include:
  - **Auto Count:** OCR for AnyDoc counts the number of documents in each batch.
  - **Prompt Operator:** When an operator clicks the Scan or Import button in the Work Flow Manager to initiate scanning or importing a batch, the Enter Batch Controls window is displayed prompting the operator for the number of documents included in the batch. At the end of the Scan or Import process, if the number of images scanned or imported does not match the number specified by the operator at the beginning of the process, a message is displayed. The operator must choose to keep or delete the batch.
  - **Split Batch Every:** The system counts the images or document sets (depending on the radio button selected) scanned or imported and splits them into a new batch each time the specified number is reached.
- 4 Leave the **Use Log Database** radio button selected to capture processing information in the Log Database. The Log Database is an audit tool that logs all OCR for AnyDoc processing.

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**Access OCR for AnyDoc Form Family Management**


- 5 Select the **Disable AutoFlow** check box to prevent AutoFlow from running for this form family.
- 6 To prevent the form family from being displayed in Work Flow Manager, select the **Hide Family** check box.
- 7 Enter a number in the **AutoFlow Priority** field. This number determines the sequence in which batches are processed for different form families in AutoFlow; 1 is the highest priority and 98 is the lowest. If this is left at zero for all form families, work is processed in the order that the form families appear in the Work Flow Manager list. For example, alphabetical order by form family description.  
These priority levels are displayed next to the form family description in the Work Flow Manager, and the form families appear in order by priority level. Although it does not display in Work Flow Manager, the default priority level for form families is 99. So, all form families with an AutoFlow priority level assigned here are processed before form families with no AutoFlow priority level.
- 8 Leave the **Create Recovery/Backup Images (.BAK)** check box selected to create a backup copy of each image in the \backup subdirectory under the directory for that batch.  
If this option is selected and the batch is restarted, the system goes to the QA or Classification phase (depending on whether QA is used for the form family). If this option is disabled, restarted batches only go back as far as Extraction. Backup files are deleted when the batch is committed.
- 9 Select the **Create Zip file of import sub-directory** check box to create a backup copy of each batch in a .ZIP file.
- 10 Select the **Retain Zip file after commit** check box to keep the .ZIP file after the Commit phase is completed.
- 11 Click **OK**.

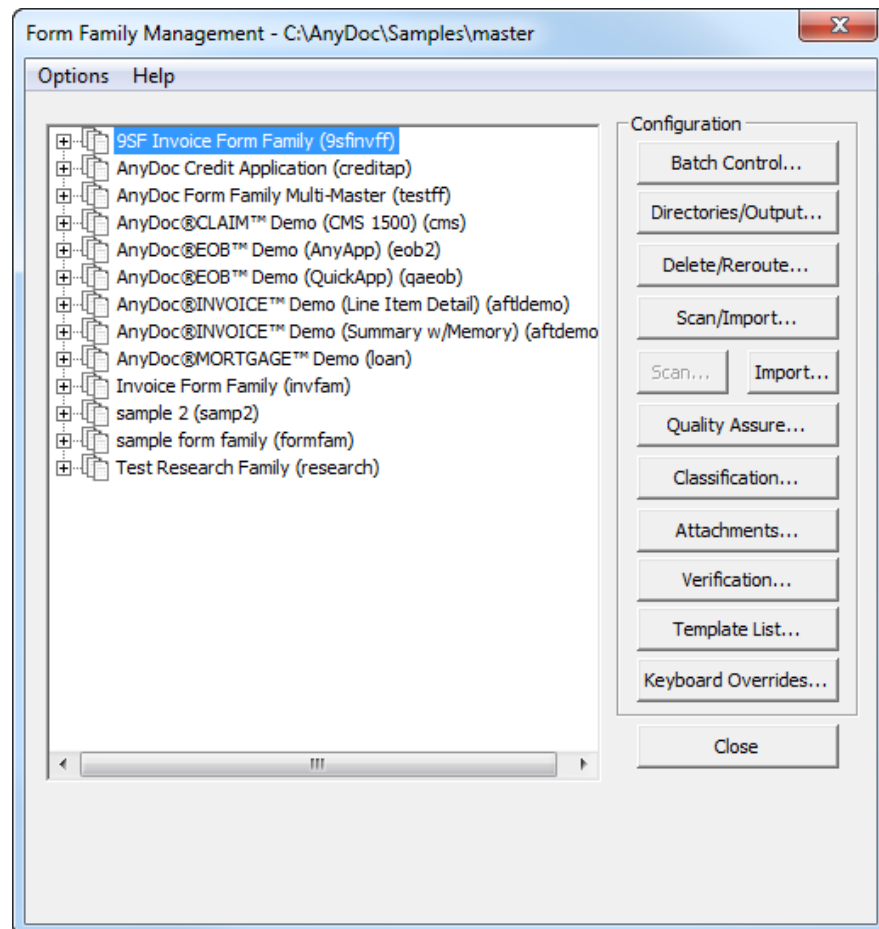
## Create a Batch Equation

### Steps

- 1 Select **Settings | OCR for AnyDoc® Form Family Management**.  
OR

**Access OCR for AnyDoc Form Family Management**

Click the **Form Families** button,  on the Management toolbar. The Form Family Management window is displayed.



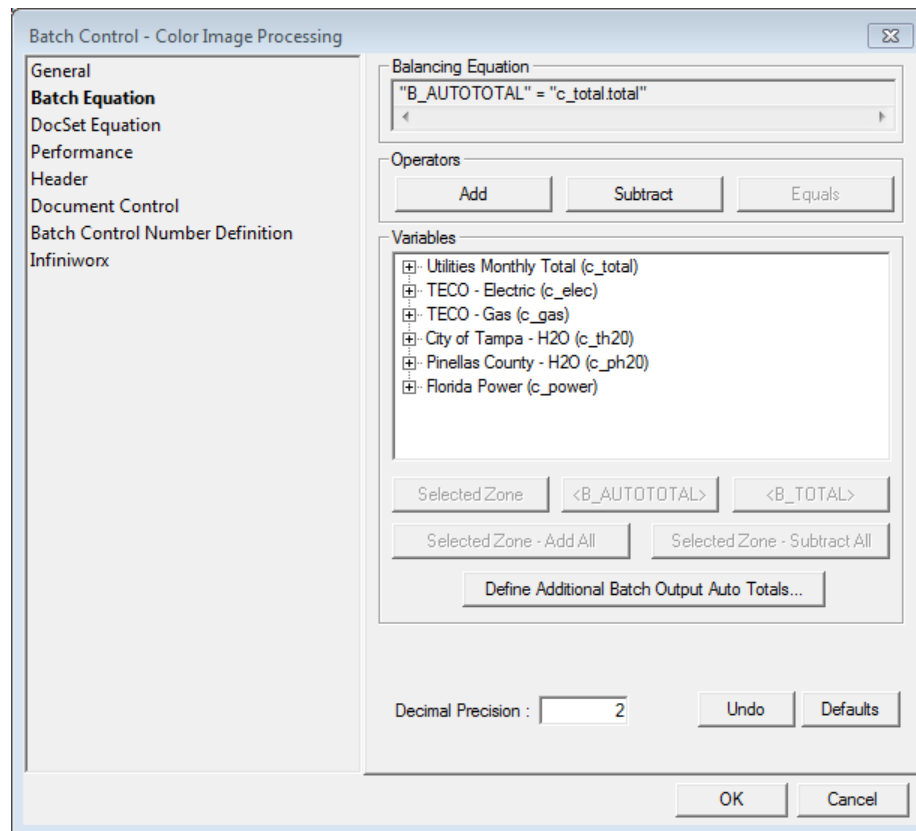
- 2 Highlight the form family to add a batch equation to and click the **Batch Control** button

OR

Highlight a form family to add a batch equation to, right-click and select **Configure | Batch Control**. The Batch Control window is displayed.

**Access OCR for AnyDoc Form Family Management**

- 3 Click the **Batch Equation** tab.



The Balancing Equation field shows the equation as it is constructed. The equation is built from left to right, with the total on the left. This means the total field must be inserted first. There are two ways to insert a total field:

- Use one of the two total buttons (<B\_AUTOTOTAL> or <B\_TOTAL>)
- Have a template in the form family that is a batch control page with the total on it and add the zone from the template to the equation like any other zone.

## **Creating an Equation Using the <B\_AUTOTOTAL> OR <B\_TOTAL> Buttons**

### **Steps**

- 1 Select a template from the **Variables** section and expand it by clicking the + sign. A list of all zones for that template is displayed. The Variables section lists all templates for the selected from family.
- 2 Click the **<B\_AUTOTOTAL>** button to add the calculated total of the specified zones from the template(s) to the equation. Since <B\_AUTOTOTAL> calculates a total from the data on the forms, it is only used to output the total, it does not trigger Balancing Verification.

OR

Click the **<B\_TOTAL>** button to add a defined total to the equation.

Unless OCR for AnyDoc is set up to look for a batch separator page, the value of **<B\_TOTAL>** is manually entered for each batch when it is scanned or imported.

The operator is prompted for the batch total. If the system is set up to use batch separator pages, the operator prints a batch separator page for each batch, marks the total on the sheet and scans the batch separator page as the first page in the batch. In this case, the system does not prompt for the operator to enter the batch total at scan/import time.

## Creating an Equation Using Zones

### Steps


- 1 Select a template from the **Variables** section and expand it by clicking the **+** sign. A list of all zones for that template is displayed. The Variables section lists all templates for the selected form family.
- 2 Select a zone to be the total field and add it to the equation by clicking **Selected Zone** (or double-click the zone). The zone is added to the Balancing Equation field.
- 3 Select additional zones to add to the equation and click **Selected Zone**. The zone is added to the Batch Equation field.
- 4 To add or subtract the selected zone with another zone, click the **Add** or **Subtract** buttons. A plus or minus sign is displayed in the Batch Equation field depending on the function selected.
- 5 Enter a number in the **Decimal Precision** field to round the amounts this number of decimal places. If the total is output, the specified number of decimals places is output.
- 6 Click the **Undo** button to remove one segment of the equation at a time starting from the last segment on the right.
- 7 Click **OK**.

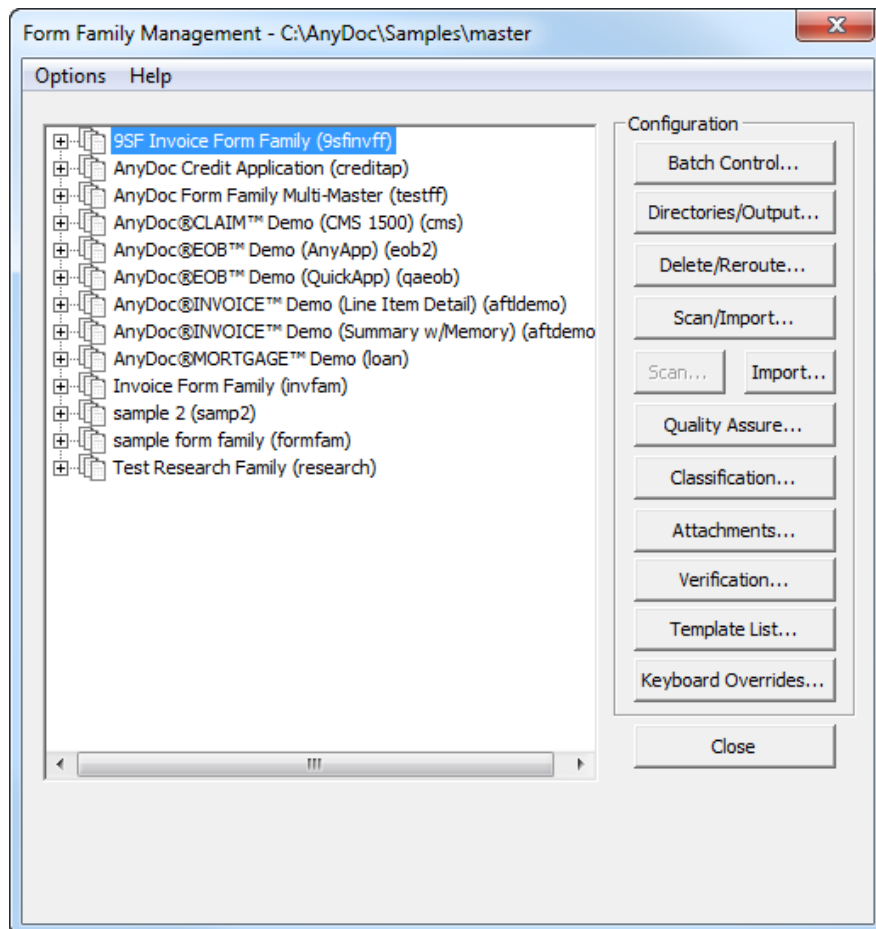
## Create a DocSet Equation

### Steps

- 1 Select **Settings | OCR for AnyDoc® Form Family Management**.  
OR

**Access OCR for AnyDoc Form Family Management**

Click the **Form Families** button,  on the Management toolbar. The Form Family Management window is displayed.

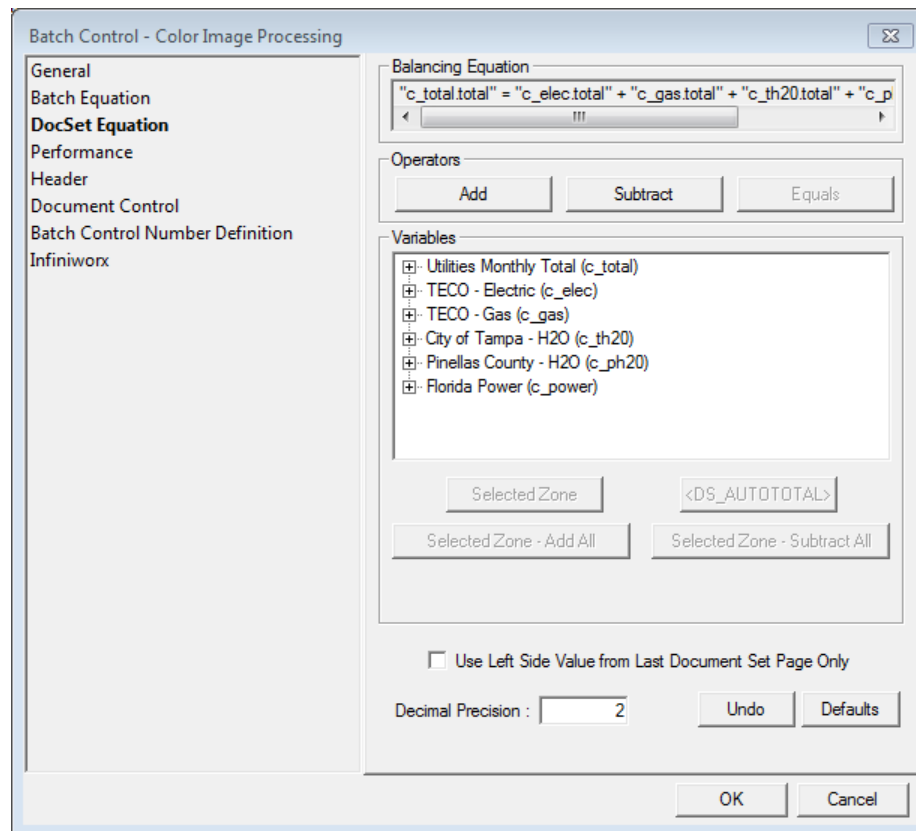


- 2 Highlight the form family to add a batch equation to and click the **Batch Control** button

OR

Highlight the form family to add a batch equation to, right-click and select **Configure | Batch Control**. The Batch Control window is displayed.

### 3 Click the **DocSet Equation** tab.



The Balancing Equation field shows the equation as it is constructed. The equation is built from left to right, with the total on the left. This means the total field must be inserted first. There are two ways to insert a total field:

- Use the total button (<DS\_AUTOTOTAL>)
- Have a template in the document set with the total on it and add the zone from the template to the equation like any other zone.

## Creating an Equation Using the <DS\_AUTOTOTAL> Button

### Steps

- 1 Select a template from the **Variables** section and expand it by clicking the + sign. A list of all zones for that template is displayed. The Variables section lists all templates for the selected form family.
- 2 Click the **<DS\_AUTOTOTAL>** button to add the calculated total of the specified zones from the template(s) to the equation.

Since <DS\_AUTOTOTAL> calculates a total from the data on the forms, it is only used to output the total in a document control, it does not trigger Balancing Verification.

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**Access OCR for AnyDoc Form Family Management**

## Creating an Equation Using Zones

### Steps

- 1 Select a template from the **Variables** section and expand it by clicking the **+** sign. A list of all zones for that template is displayed. The Variables section lists all templates for the selected form family.
- 2 Select a zone to be the total field and add it to the equation by clicking **Selected Zone** (or double-click the zone). The zone is added to the Balancing Equation field.
- 3 Select additional zones to add to the equation and click **Selected Zone**. The zone is added to the Batch Equation field.
- 4 To add or subtract the selected zone with another zone, click the **Add** or **Subtract** buttons. A plus or minus sign is displayed in the Batch Equation field depending on the function selected.
- 5 Enter a number in the **Decimal Precision** field to round the amounts the specified number of decimal places. If the total is output, the specified number of decimals places is output.
- 6 Click the **Undo** button to remove one segment of the equation at a time starting from the last segment on the right.
- 7 Click **OK**.

## Set Performance Options

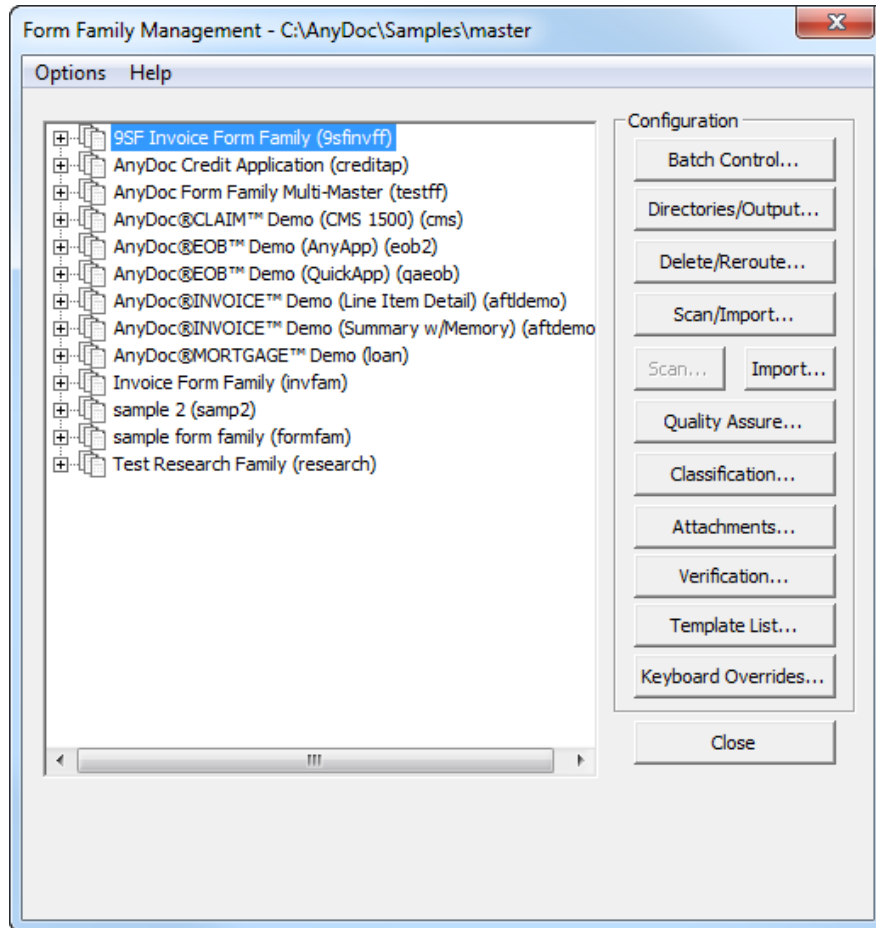
### Steps

- 1 Select **Settings | OCR for AnyDoc® Form Family Management**.  
OR  
Click the **Form Families** button,  on the Management toolbar.



**Access OCR for AnyDoc Form Family Management**

The **Form Family Management** window is displayed.



- 2 Highlight the form family to set performance options for, right-click and select **Configure | Batch Control**

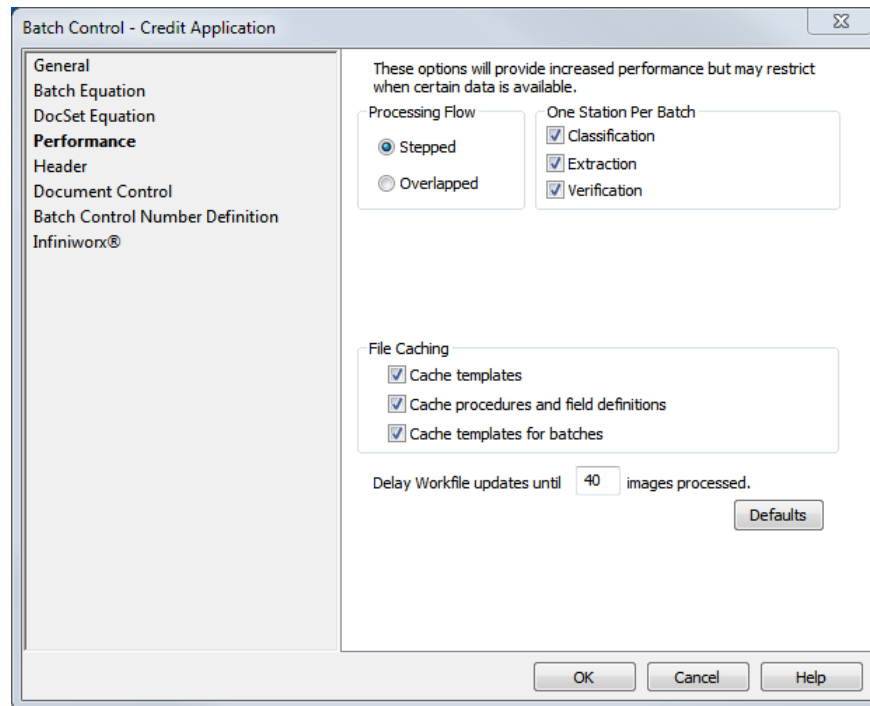
OR

Click the **Batch Control** button.

The **Batch Control** window is displayed.

**Access OCR for AnyDoc Form Family Management**

- 3 Click the **Performance** tab.



- 4 In the **Processing Flow** section, select one of the following options:
- **Stepped:** All images in a batch must complete a processing phase before any images in the batch enter the next phase. This setting is recommended because it is cleaner and ensures that any attachments stay with the correct data images.
  - **Overlapped:** As each batch image completes a processing phase, it moves on to the next phase without waiting for the remaining images in the batch. The only exceptions are the Scan/Import phase, which does not release images until the whole batch is imported and the Commit phase, which does not begin until the entire batch is ready to Commit.
- 5 Select a check box in the **One Station Per Batch** section to specify if an entire batch is processed on one workstation in certain phases or whether on batch can be split between workstations. Options include:
- **Classification:** Each batch is processed on one workstation during the Classification phase.
  - **Extraction:** Each batch is processed on one workstation during the Extraction phase.
  - **Verification:** Each batch is processed on one workstation during the Verification phase.
- 6 Enable check boxes in the **File Caching** section to determine what files are cached on the local workstation, if any. Options include:

---

Access OCR for AnyDoc Form Family Management

- **Cache templates:** All templates in the master directory are cached on the local workstation. When processing a batch, the first time each template is accessed, the system check the local copy of the template associated with that batch against the server copy. If the local copy is different, the template is copied from the server and that copy of the template is used until the batch is completed.
  - **Cache procedures and field definitions:** Keeps a current copy of any procedures, which are defined for each master form template, and field definitions, available to all templates, in local directories under the OCR for AnyDoc temp directory. The internal cache flags are reset when batch processing is completed. The first time each file is accessed after the flags have been reset, the system checks the local copy against the server copy. If the local copy is incorrect, the proper file is copied from the server. Accessing each file in the future uses the local copy until batch processing is completed.
  - **Cache templates for batches:** Templates are copied to a separate directory under the form family jobs directory. These directories are named "nnn.mst", where "nnn" is 001 through 999. Each directory consists of a snapshot of the master form templates set for the form family. Each time a new batch is created, the latest template set is compared to the current templates on the server. If the latest master form template set is current, the new batch is configured to use that set.
- 7 Enter a number in the **Delay Workfile updates until \_ images processed.** field to reduce file access contention when multiple workstations are processing images from the same form family. The file is locked while it is being updated.
- 8 Click **OK**.


## Create a Batch Header

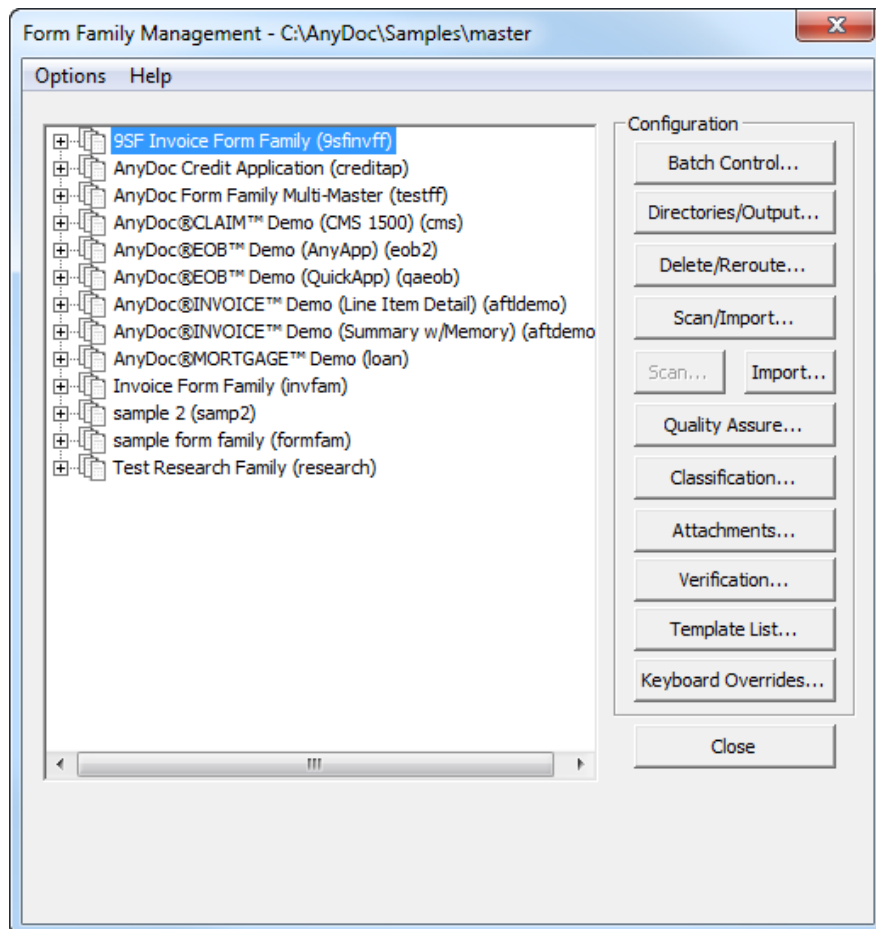
The **Batch Control | Header** tab allows you to include a header record in the ASCII output file. This is a single record that is displayed at the beginning of the output for each batch. A header record can contain system defined control fields, static literal text, and information entered by the operator at Scan/Import time.

### Steps

- 1 Select **Settings | OCR for AnyDoc® Form Family Management**.  
OR

**Access OCR for AnyDoc Form Family Management**

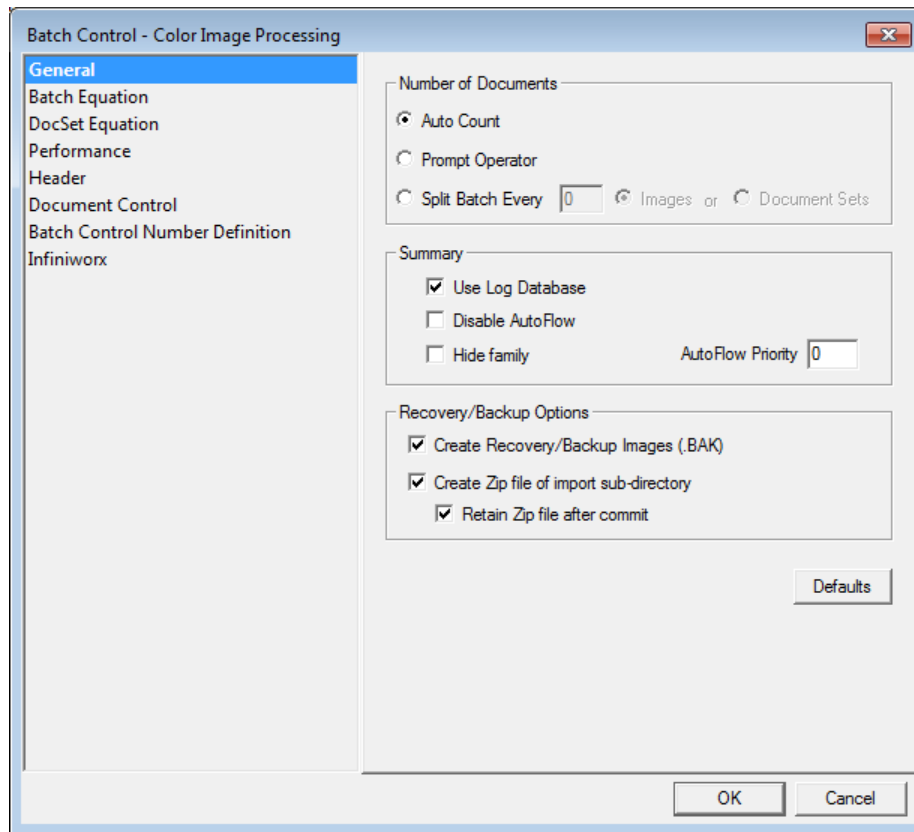
Click the **Form Families** button,  on the Management toolbar. The Form Family Management window is displayed.



- 2 Select the form family in which to add a batch equation and click the **Batch Control** button  
OR

**Access OCR for AnyDoc Form Family Management**

Select the form family in which to add a batch equation, right-click and select **Configure | Batch Control**. The Batch Control window is displayed.



**Access OCR for AnyDoc Form Family Management**

- 3 Click the **Header** tab.

- 4 Select an option from the **System Defined Control Fields** list and click **Add Field**. The field is added to the Batch Header Expression field. Options in the System Defined Control Fields list include:

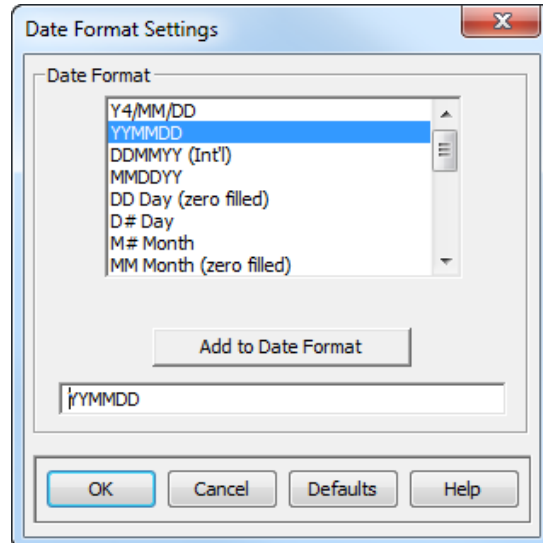
System Defined Field	Expression	Output
Batch Control Number (User Assigned)	<B_CTRL_NUMBER>	Outputs the user-defined batch control number
Batch Date	<B_DATE>	Outputs the date the batch was created.
Batch ID (System Assigned)	<B_NUMBER>	Outputs the system assigned batch number
Batch Operator	<B_OPER>	Outputs the station's network ID that created the batch or if a login is used, the user name.
Batch Time	<B_TIME>	Outputs the time in hour:minute:second format that the batch was created.

## Access OCR for AnyDoc Form Family Management

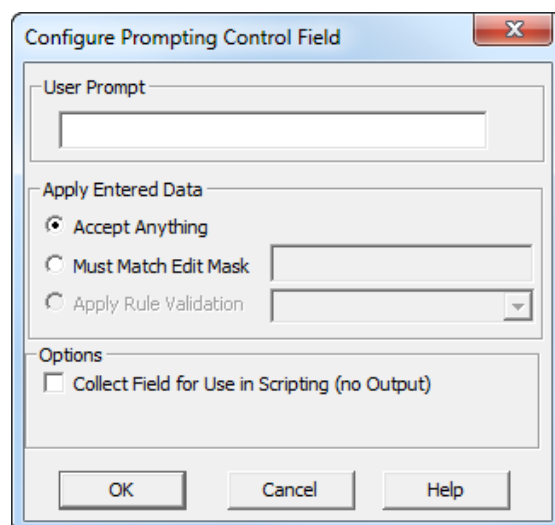
<b>System Defined Field</b>	<b>Expression</b>	<b>Output</b>
Batch Auto Total	<B_AUTOTOTAL>	Outputs the total amount for a batch total equation without having to define the result.
Batch Total	<B_TOTAL>	Outputs the result of a defined batch total equation.
Image Creation Date	<I_DATE>	Outputs the date the image was imported into the system.
Image Creation Time HH:MM:SS	<I_TIME>	Outputs the time the image was imported into the system.
Number of Documents	<B_NBR_OF_DOCS>	Outputs the total number of images in the batch.
ScanErrors	<SCAN_ERRORS>	Outputs any scan error messages that occurred during scan time.
ScanErrorsTime	<SCAN_ERROR_TIME>	Outputs the time that the scan error occurred.
ScanTotalTime	<SCAN_TOTAL_TIME>	Outputs the total amount of time to scan the batch.

**Access OCR for AnyDoc Form Family Management**

- To set the output format for a date field in the Batch Header Expression, click the **Date Formatting** button and select the date field to format. The **Date Format Settings** window is displayed.



- Select a **Date Format** and click **Add to Date Format**. The selected date format is displayed in the field below the Add to Date Format button.
- Click **OK** to close the **Date Format Settings** window and return to the **Batch Control | Header** tab. The system-defined date field has been updated with the date format (for example, <B\_DATE> could be formatted to <B\_DATE:YYMMDD>).
- To prompt the operator to add information to the control expression, click the **Add Prompting Control** button. The **Configure Prompting Control Field** window is displayed.





- 9 Enter text into the **User Prompt** field with which to prompt the Scan or Import operator.
- 10 Enable a radio button in the **Apply Entered Data** section to set limits on what data is valid in the prompting control field. Options include:
  - **Accept Anything:** The system does not restrict what the operator enters in the field.
  - **Must Match Edit Mask:** The data entered by the operator in the field must match the edit mask entered in the field to the left of this radio button.
  - **Apply Rule Validation:** This option only applies to dates. It restricts the format of the date entered by the operator to the required format selected from the drop down list to the left of the radio button.
- 11 Click **OK** to close the **Configure Prompting Control Field** window. Enable the **Insert delimiter character(s)** check box to insert the delimiters entered in the **before and after** fields. These characters are placed before and after each field in the output record.
- 12 Enter a character in the **Terminate Batch Header Record with** field to specify the character that indicates the end of the physical record in the ASCII output. Options include:
  - A null character
  - \t to output a tab
  - \r or \n to output a carriage return
  - \f to output a form feed
- 13 Click **OK**.

## Document Control Expressions

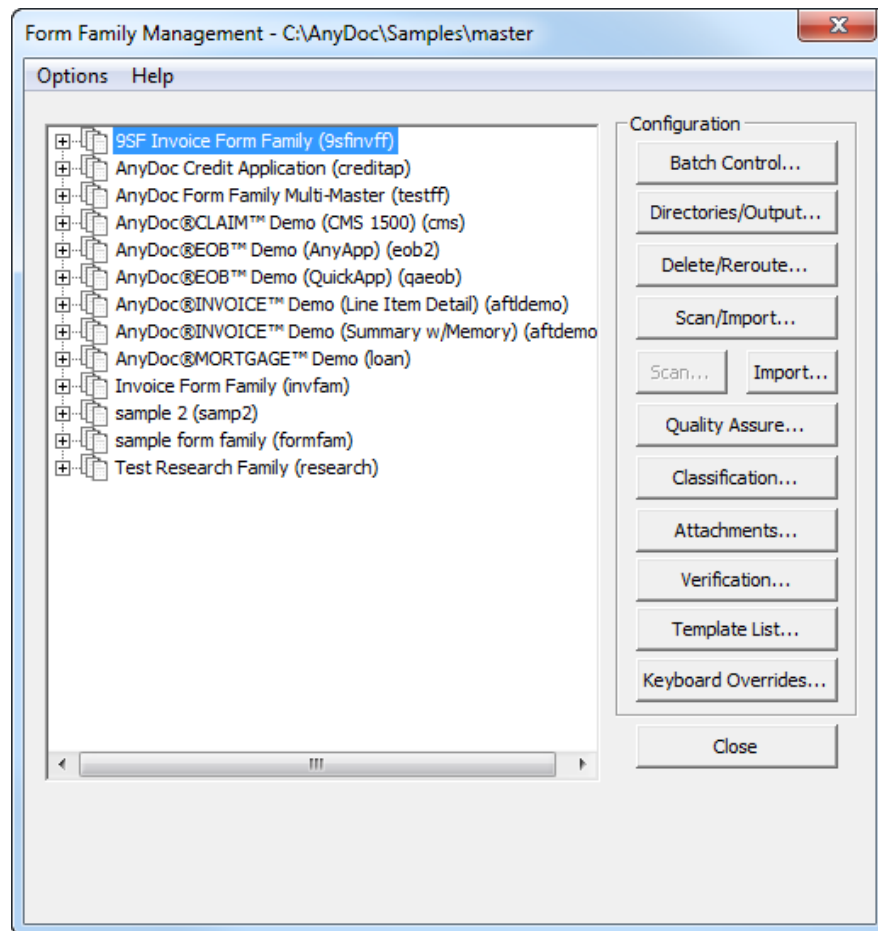
The **Batch Control | Document Control** tab allows ASCII data, such as the date, time, operator, or batch information, to be included in every output record for a Master Form Template. OCR for AnyDoc provides a number of pre-defined fields and allows user-defined fields. Document controls defined at the Form Family level are output either once for every form or once for every record. Document controls can be defined for individual templates in the Output Parameters for each template.

In Form Family Management, document controls can also be defined to apply to attachments (in the **Attachment Page Settings | Document Control** tab) or to deleted images (in the **Delete/Reroute Settings | Document Control** tab).

### Steps

**Access OCR for AnyDoc Form Family Management**

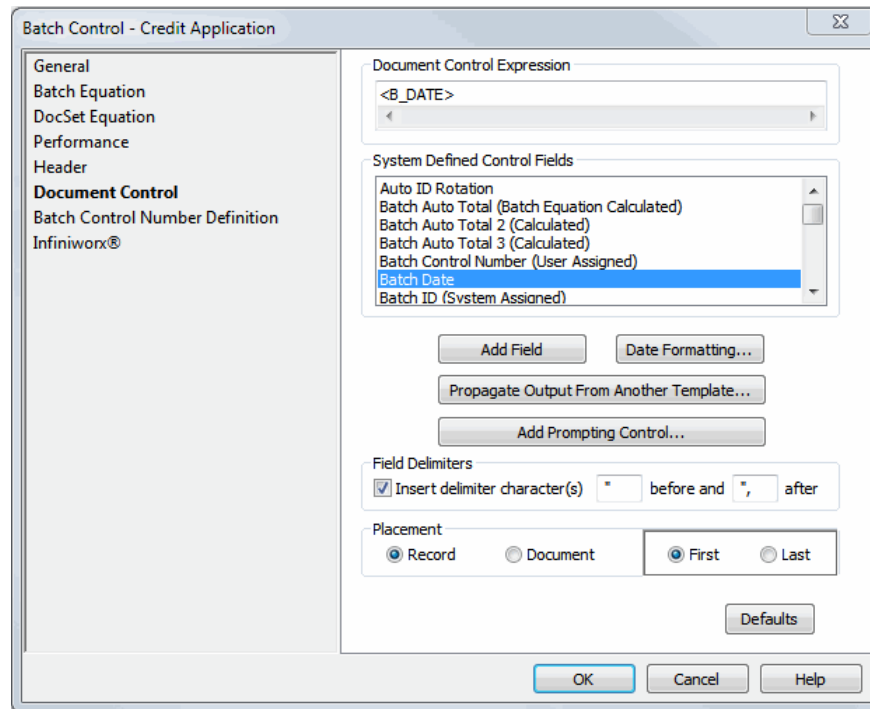
- 1 Select **Settings | OCR for AnyDoc® Form Family Management**. The Form Family Management window is displayed.



- 2 Select the form family in which to define a batch control expression.
- 3 Either click the **Batch Control** button, or right-click the selected form family and select **Configure | Batch Control**. The **Batch Control** window is displayed.

## Access OCR for AnyDoc Form Family Management

- 4 Click the **Document Control** tab.



- 5 Select an option from the **System Defined Control Fields** list and click **Add Field**. The field is added to the **Document Control Expression** field. Options in the System Defined Control Fields list include:

Field	Expression	Output / Description
Auto ID Rotation	<S_IDROTATION>	Outputs the rotation (0°, 90°, 180°, or 270°) of the data image.
Batch Auto Total (Batch Equation Calculated)	<B_AUTOTOTAL>	Outputs the total amount for a batch total equation without having to define the result.
Batch Auto Total 2 (Calculated)	<B_AUTOTOTAL2>	Outputs the total amount for an equation without having to define the result.
Batch Auto Total 3 (Calculated)	<B_AUTOTOTAL3>	Outputs the total amount for an equation without having to define the result.
BancTec/SpeedFirst Batch Input Fields (ONX)	<BANCTEC_ONX>	Outputs information created when scanning from a BancTec scanner.
Batch Control Number (User Assigned)	<B_CTRL_NUMBER>	Outputs the user-defined batch control number.

**Access OCR for AnyDoc Form Family Management**

<b>Field</b>	<b>Expression</b>	<b>Output / Description</b>
Batch Date	<B_DATE>	Outputs the date the batch was created.
Batch ID (System Assigned)	<B_NUMBER>	Outputs the system assigned batch number.
Batch Operator	<B_OPER>	Outputs the network ID of station that created the batch, or if logins are used, the user name.
Batch Sequence Nbr ####	<S_BSEQ>	Outputs the sequence number of the image within the batch as a 4-digit number. For example, the third image in the batch would output "0003".
Batch Sequence Nbr #####	<S_BSEQ_05>	Outputs the sequence number of the image within the batch as a 5-digit number. For example, the third image in the batch would output "00003".
Batch Time	<B_TIME>	Outputs the time in hour:minute:second format that the batch was created.
Batch Total (Prompted)	<B_TOTAL>	Outputs the result of a defined batch total equation.
CAPTUREit Batch ID	<ASI_CAPTURE_BATCH_ID>	Outputs the batch ID from CAPTUREit if the batch was scanned with CAPTUREit.
Document Nbr 1 #####	<DOC_F1>	Outputs the image's file name.
Document Nbr 2 c:\..\#####.tif	<DOC_F2>	Outputs the fully qualified path and image file name with .tif extension after Commit.
Document Nbr 3 #####.tif	<DOC_F3>	Outputs the image's file name with .tif extension after Commit.
Document Set AutoTotal	<DS_AUTOTOTAL>	Outputs the total value for an equation per Document Set.
Document Set Number in Batch	<DS_NBR_IN_BATCH>	Outputs the sequence of the document set within the batch.
Document Set Page Sequence	<DS_PGSEQ>	Outputs the sequence of the page within the document set.
Document Set Total Number of Pages	<DS_TOTAL>	Outputs the total number of pages in the document set.

## Access OCR for AnyDoc Form Family Management

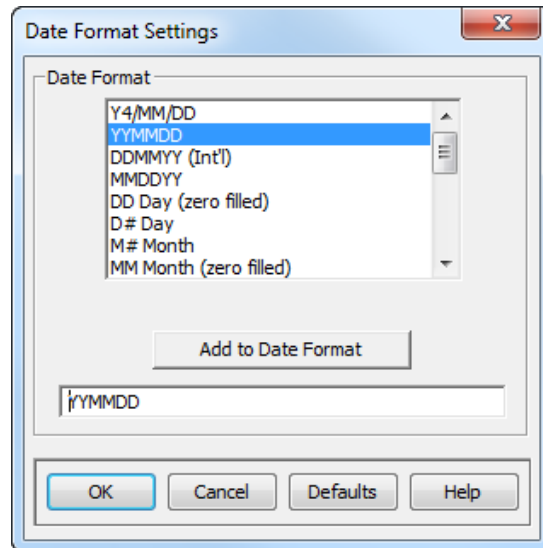
Field	Expression	Output / Description
Extract Date	<X_DATE>	Outputs the date the image was extracted.
Extract Operator	<X_OPER>	Outputs the network ID of the extraction station, or if logins are used, the user name.
Extract Time HH:MM:SS	<X_TIME>	Outputs the time in hour:minute:second format that the image was extracted.
Image Creation Date	<I_DATE>	Outputs the date the image was imported into the system.
Image Creation Time HH:MM:SS	<I_TIME>	Outputs the time the image was imported into the system.
Imprinter String	<S_IMPRINTER>	Outputs the imprinter string configured under <b>Settings   Scanner Setup   Imprinter</b> .
Number of Doc Sets	<B_NBR_OF_DOCSETS>	Outputs the total number of document sets in the batch.
Number of Documents	<B_NBR_OF_DOCS>	Outputs the total number of images in the batch.
Number of Line Items	<B_NBR_OF_LINEITEMS>	Outputs the number of total line items in an AnyApp template.
Number of Total Sets	<B_NBR_OF_TOTALSETS>	Outputs the number of total sets in an AnyApp template.
Orig Doc Multi-Page Sequence	<ORIG_DOC_SEQ>	Outputs the sequence of the image from within a multipage tiff.
Orig Doc Nbr 1 #####	<ORIG_DOC_F1>	Outputs the imported image's original file name.
Orig Doc Nbr 2 c:\..\#####.tif	<ORIG_DOC_F2>	Outputs the fully qualified path and the original image's file name with .tif extension after Commit.
Orig Doc Nbr 3 #####.tif	<ORIG_DOC_F3>	Outputs the imported image's original file name followed by the extension .tif.
Orig PDF Archive Copy 2 c:\..\#####.pdf	<ARCHIVE_ORIG_DOC_F2>	Outputs the fully qualified archive path and subdirectory of the original image copy and the original .pdf file name. The archive directory location

**Access OCR for AnyDoc Form Family Management**

<b>Field</b>	<b>Expression</b>	<b>Output / Description</b>
		is set on the <b>Directories/Output Settings   Archive Image Options</b> window.
Previous Index Fields	<PREV_INDEX_FIELDS>	This applies to attachments only. Any index fields on the previous data image are output in the document control expression for the attachment.
QA Date	<Q_DATE:MM/DD/YY>	Outputs the date the batch was reviewed by the QA Operator.
QA Operator	<Q_OPER>	Outputs the user name of the QA operator.
QA Time HH:MM:SS	<Q_TIME>	Outputs the time in hour:minute:second format that the batch was released by the QA phase.
Scan/Import Operator	<S_OPER>	Outputs the user name of the Scan or Import station.
ScanErrors	<SCAN_ERRORS>	Outputs any messages of scan errors that occurred during the scan time.
ScanErrorsTime	<SCAN_ERROR_TIME>	Outputs the time that the scan error occurred.
ScanTotalTime	<SCAN_TOTAL_TIME>	Outputs the total amount of time to scan the batch.
System Import Date MM/DD/YY	<S_DATE>	Outputs the date the image was Imported by OCR for AnyDoc.
System Import Time	<S_TIME>	Outputs the time in hour:minute:second format that the image was scanned or imported.
Template Name	<FRM_ID>	Outputs the file name (no extension) of the master form template the current data image has been identified as matching.
Verify Date	<V_DATE>	Outputs the date the image was verified.
Verify Operator	<V_OPER>	Outputs the user name of the Verification operator.

Field	Expression	Output / Description
Verify Time HH:MM:SS	<V_TIME>	Outputs the time in hour:minute:second format that the image was verified.

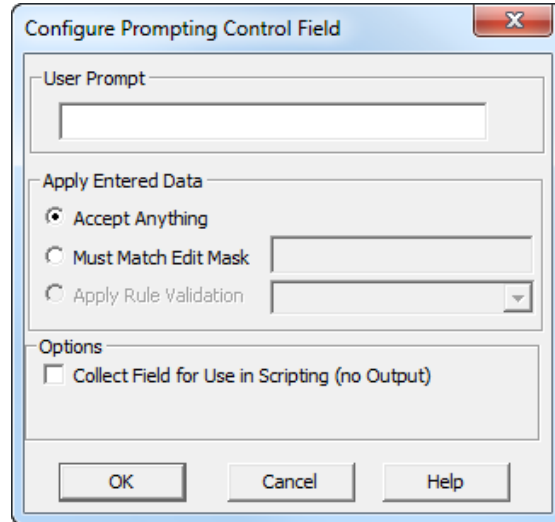
- 6 To set the output format for a date field in the Document Control Expression, click the **Date Formatting** button and select the date field to format. The **Date Format Settings** window is displayed.



- 7 Select a **Date Format** and click **Add to Date Format**. The selected date format is displayed in the field below the Add to Date Format button.
- 8 Click **OK** to close the **Date Format Settings** window and return to the **Document Control** tab. The system-defined date field has been updated with the date format (for example, <B\_DATE> could be formatted <B\_DATE:YYMMDD>).
- 9 To copy output from a zone on one template into the document control expression for all templates in the form family, click the **Propagate Output From Another Template** button. The **Select Template And Zone Name** window is displayed. For more information, see Propagate Output from Another Template (page [287](#)).

**Access OCR for AnyDoc Form Family Management**

- 10 To prompt the operator to add information to the control expression, click the **Add Prompting Control** button. The **Configure Prompting Control Field** window is displayed.



- 11 Enter text into the **User Prompt** field with which to prompt the Scan or Import operator.
- 12 Enable a radio button in the **Apply Entered Data** section to set limits on what data is valid in the prompting control field. Options include:
- **Accept Anything:** The system does not restrict what the operator enters in the field.
  - **Must Match Edit Mask:** The data entered by the operator in the field must match the edit mask entered in the field to the left of this radio button.
  - **Apply Rule Validation:** This option only applies to dates. It restricts the format of the date entered by the operator to the required format selected from the drop down list to the left of the radio button.
- 13 Click **OK** to close the **Configure Prompting Control Field** window. Enable the **Insert delimiter character(s)** check box to insert the delimiters entered in the **before and after** fields. The characters entered in the **before and after** fields are placed before and after each field in the output record.
- 14 Enable the **Record** radio button in the **Placement** section to output the document control expression in each record,  
OR  
Enable the **Document** radio button to output the document control expression once per page, regardless of the number of records.
- 15 Enable the **First** radio button in the **Placement** section to place the document control expression at the beginning of each record or document,  
OR



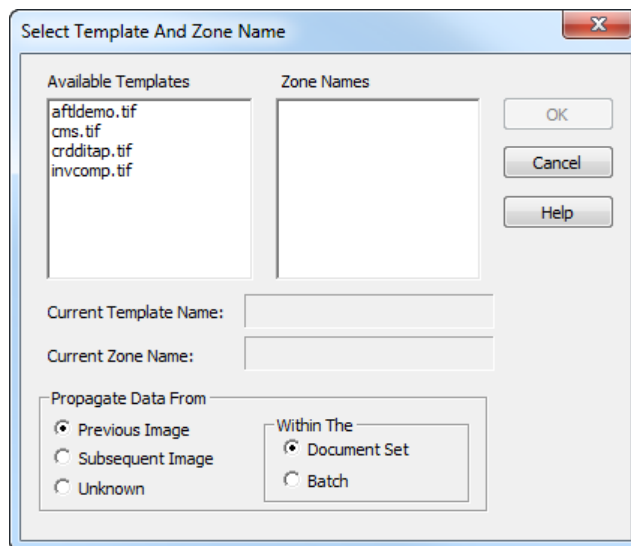
Enable the **Last** radio button to place the document control expression at the end of each record or document.

- 16 Click **OK** to close the **Batch Control** window.

## Propagate Output from Another Template

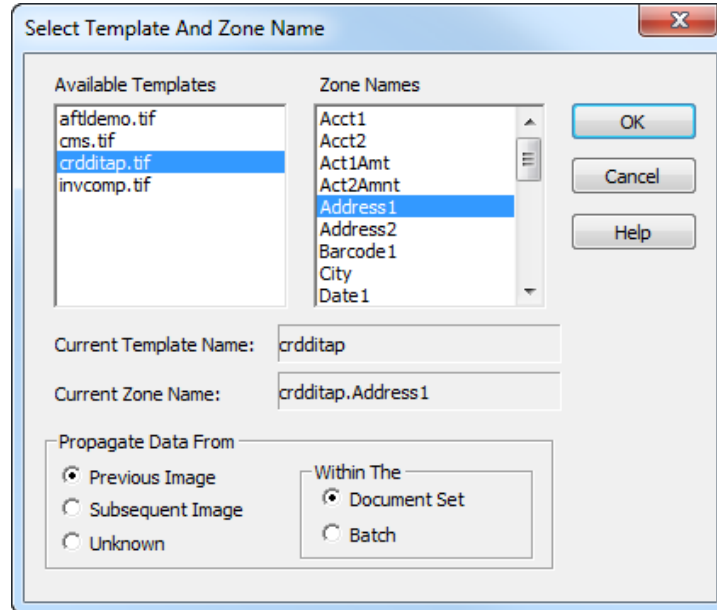
### Steps

- 1 From the **Document Control** tab, click the **Propagate Output From Another Template** button. The **Select Template And Zone Name** window is displayed.



**Access OCR for AnyDoc Form Family Management**

- 2 Select an **Available Template** from the list. This field displays all templates in the form family. The **Zone Names** field populates with the zones associated with the selected template.



- 3 Double-click each zone name to add to the document control expression.
- 4 Enable a radio button in the **Propagate Date From** section to specify where the data image for the selected template is in the batch. Options include:
  - **Previous Image:** If the zone is located on the previous image in the doc set or batch.
  - **Subsequent Image:** If the zone is on the page after the current page in the doc set or batch.
  - **Unknown:** If the zone is on an image either before or after the current page.
- 5 Enable one of the radio buttons in the **Within The** section to determine whether the application looks in the **Document Set** or the **Batch** for the page containing the specified zone.
- 6 Click **OK** to close the **Select Template And Zone Name** window.


## Batch Control Number Definition

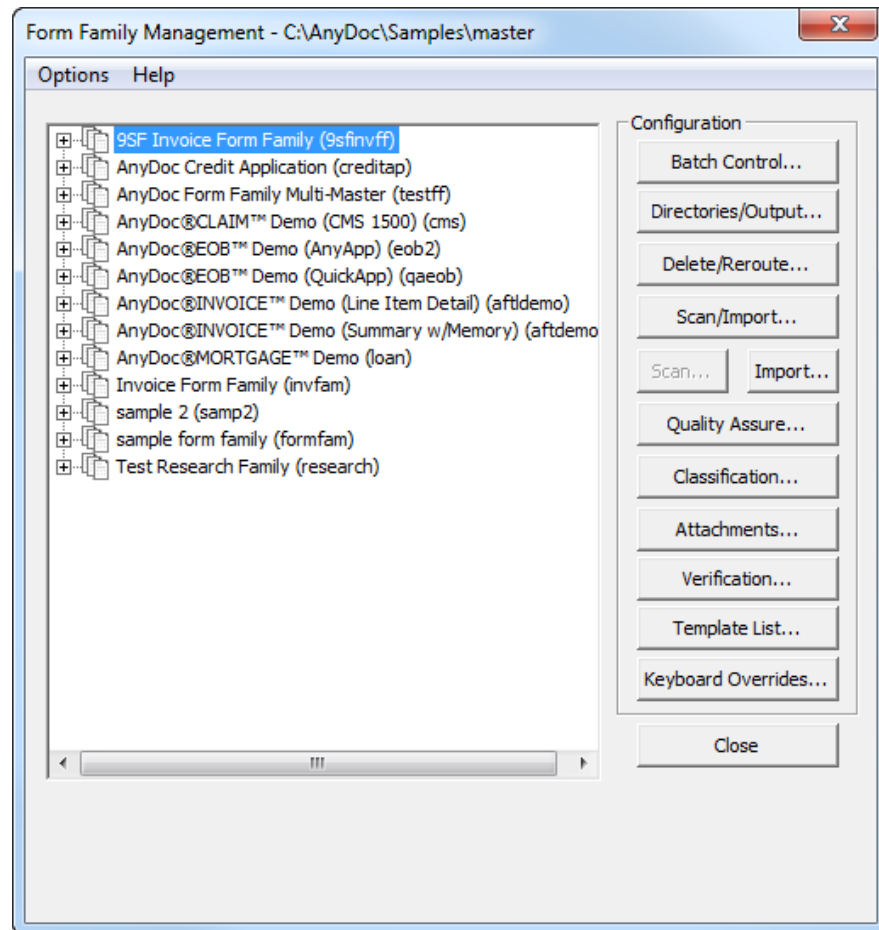
### Steps

- 1 Select **Settings | OCR for AnyDoc® Form Family Management**.

**Access OCR for AnyDoc Form Family Management**

OR

Click the **Form Families** button,  on the Management toolbar. The Form Family Management window is displayed.



- 2 Select the form family in which to define a batch control number and click the **Batch Control** button

OR

Select the form family in which to define a batch control number, right-click and select **Configure | Batch Control**. The Batch Control window is displayed.

**Access OCR for AnyDoc Form Family Management**

- 3 Click the **Batch Control Number Definition** tab.

The Batch Control Number Definition field displays the information that makes up the batch control number.

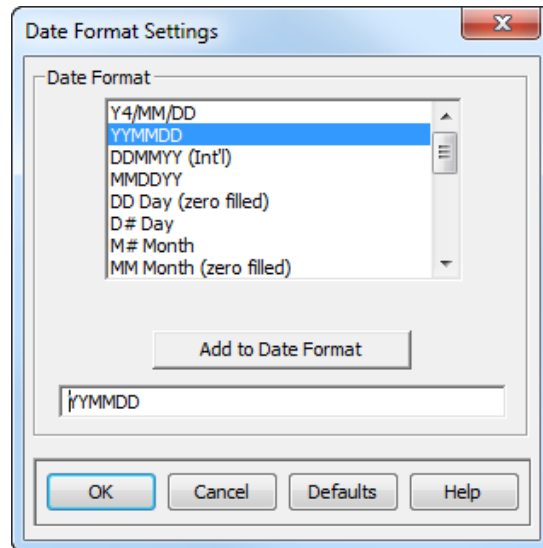
- 4 Select a **Control Field** to add to the Batch Control Number Definition field and click **Add Field**. Control Fields include:

Control Field	Description
Auto Incrementing Sequence Number	A system-wide sequential number that increases with each batch.
Auto Incrementing Sequence Number (Reset Daily/No Prompt)	A system-wide sequential number that starts over from 1 each day.
Batch Date	The date the batch was created.
Batch Time	Outputs the time the batch was created in hours:minutes:seconds format.
Kodak Fixed Field	This field only applies if you are using a Kodak scanner interface. This is the fixed field portion of the image address.
Scan Station ID	The workstation ID where the batch was scanned.

- 5 If you are including the Batch Date field in the batch control number, **Date Formatting** allows you to specify an output format for the date. From the **Date**

**Format Settings** window, select a **Date Format** from the provided list and click **Add to Date Format**. The selected date format is displayed in the field below the Add to Date Format button.

- 6 From the **Date Format Settings** window, select a **Date Format** from the provided list and click **Add to Date Format**. The selected date format is displayed in the field below the Add to Date Format button.



- 7 To add the date format to the control expression field, click **OK**.
- 8 Select a formatting option from the Format Batch Control Number section. Options include:
  - **No Formatting (Use Exactly):** The batch control number is not reformatted with leading zeros. The number is output exactly as it appears.
  - **Zero Fill Numerics To Length:** Reformat all numeric values in the batch control number to a specified length. The number is reformatted by adding the necessary number of leading zeros. For example, if the number is 156 and the setting specifies to reformat the value to a length of five, then the value is output as 00156. The formatting applies to all uses of the batch control number, such as ASCII output, GTO, and directories. The default is to reformat the number to a length of nine.
- 9 Click **OK**.

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**Access OCR for AnyDoc Form Family Management**

## Infiniworx

OCR for AnyDoc integrates with Infiniworx during batch processing by routing batches to Infiniworx after the Import or QA phase. Infiniworx applies advanced Classification and Check 21 processing features to the batch and then imports the batch back into OCR for AnyDoc and continues processing the batch through the applicable phases.


These Infiniworx integration features are done in Batch Control | Infiniworx. The options on this dialog are only available when using IBML or OPEX Advanced Import. This feature requires that the following tools be used in Infiniworx:

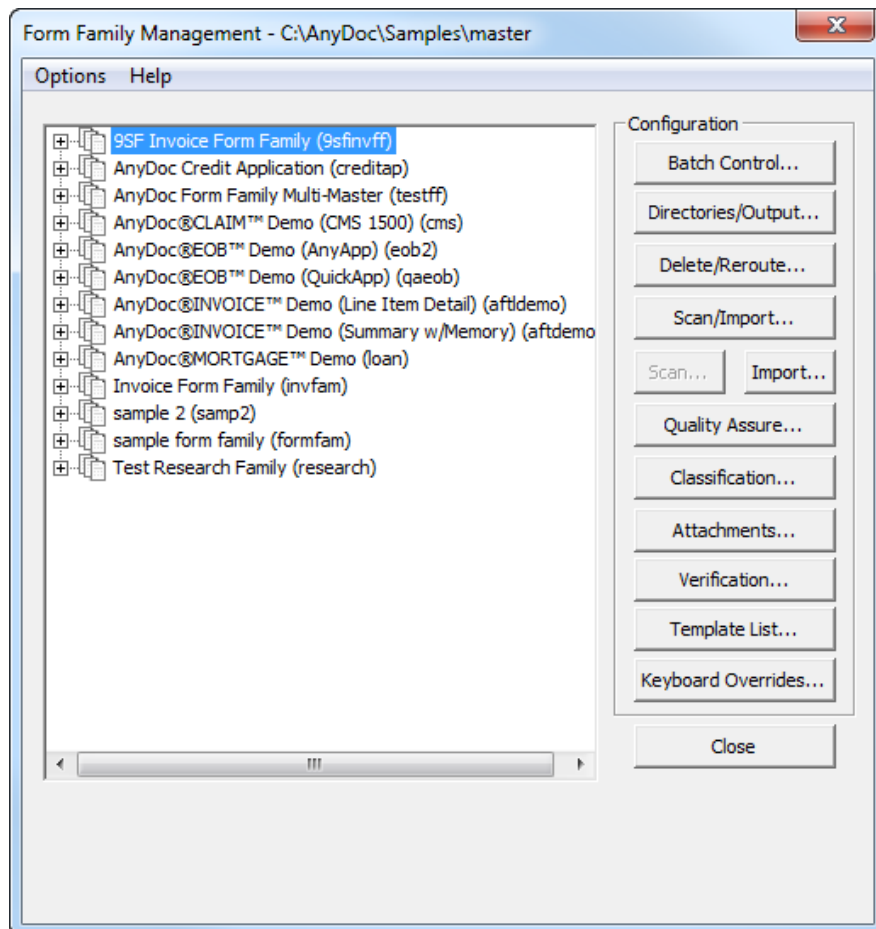
- **Import From CAPTUREit**  
The directory specified in this tool must match the Infiniworx Import Path specified on this window.
- **Export to OCR for AnyDoc**  
When exporting, Infiniworx must export to the form family's Import path.

### Steps

- 1 Select **Settings | OCR for AnyDoc® Form Family Management**.  
OR

**Access OCR for AnyDoc Form Family Management**

Click the **Form Families** button,  on the Management toolbar. The Form Family Management window is displayed.



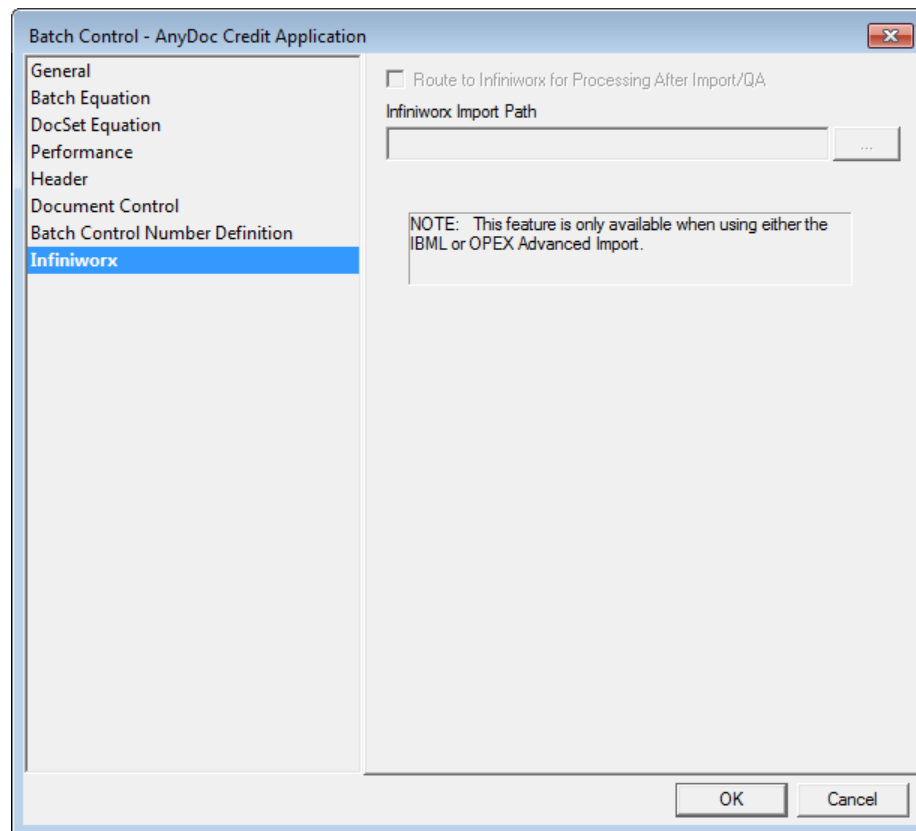
- 2 Highlight a form family to set batch control settings and click the **Batch Control** button

OR

Highlight a form family to set batch control settings, right-click and select **Configure | Batch Control**. The Batch Control window for the selected form family is displayed.

**Access OCR for AnyDoc Form Family Management**

- 3 Click the **Infiniworx** tab.



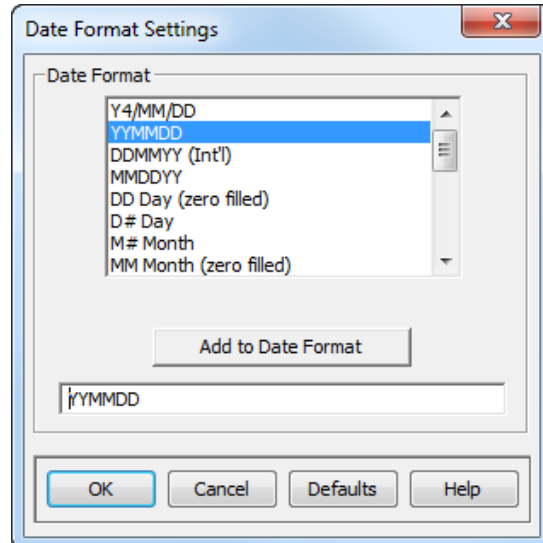
Option	Description
Route to Infiniworx for Processing After Import/QA	Select this check box to automatically route batches to Infiniworx after the Import or QA phase. The batch routed to Infiniworx must remain one batch and be routed back to the same form family.
Infiniworx Import Path	Enter the directory that Infiniworx imports the batch from.

## Date Formatting

### Steps



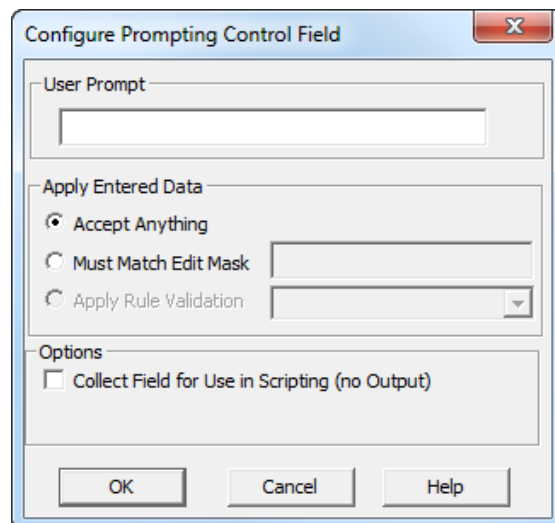
- 1 From the **Date Format Settings** window, select a **Date Format** from the provided list and click **Add to Date Format**. The selected date format is displayed in the field below the Add to Date Format button.



- 2 To add the date format to the control expression field, click **OK**.

## Configure Prompting Control Field

- 1 To prompt the operator to add information to the control expression, click the **Add Prompting Control** button. The **Configure Prompting Control Field** window is displayed.



- 2 Enter text into the **User Prompt** field with which to prompt the Scan or Import operator.

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**Access OCR for AnyDoc Form Family Management**

- 3 Enable a radio button in the **Apply Entered Data** section to set limits on what data is valid in the prompting control field. Options include:
  - **Accept Anything:** The system does not restrict what the operator enters in the field.
  - **Must Match Edit Mask:** The data entered by the operator in the field must match the edit mask entered in the field to the left of this radio button.
  - **Apply Rule Validation:** This option only applies to dates. It restricts the format of the date entered by the operator to the required format selected from the drop down list to the left of the radio button.
- 4 Click **OK** to close the **Configure Prompting Control Field** window.

## Directory and Output Settings

From the Directory/Output Settings window you can specify:

- Output file naming convention
- Directories used to store ASCII text and archive image files
- How document sets are defined in the form family
- Other date file types to output at Commit
- An EXCHANGEit project to run when the batch is committed

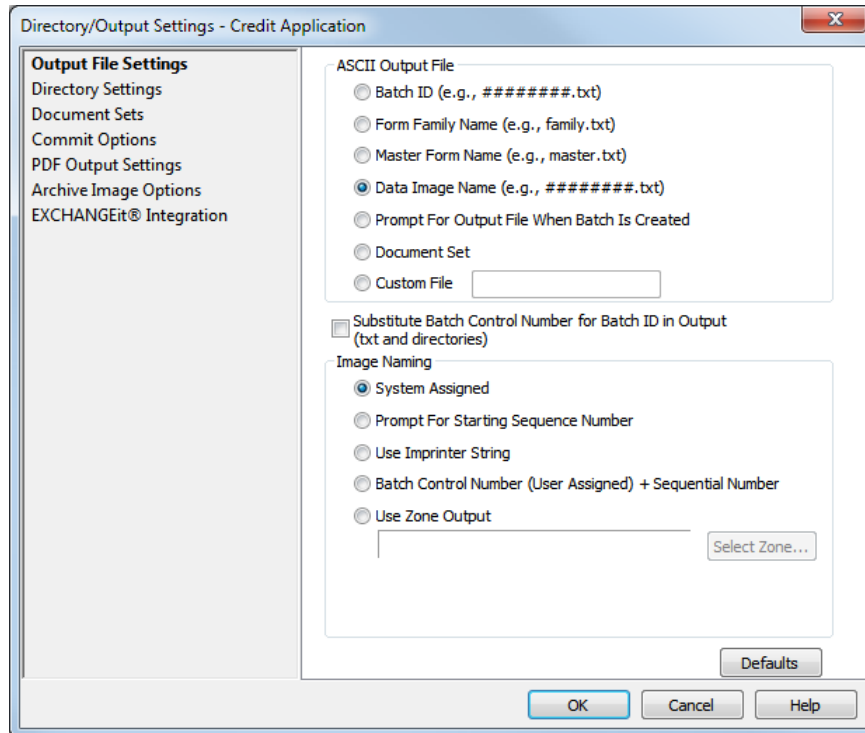
To access the Directory/Output Settings window, select **Settings | OCR for AnyDoc® Form Family Management | Directories/Output**.

## Output File Settings

### Steps

- 1 Select **Settings | OCR for AnyDoc® Form Family Management | Directories/Output**.

The **Directory/Output Settings** window is displayed.



- 2 To specify how the ASCII output file is named, select a radio button in the **ASCII Output File** section. Options include:
  - **Batch ID (#####.txt):** The file name is the system assigned batch ID. One ASCII file is generated per batch.
  - **Form Family Name (family.txt):** The file name is the form family name. Selecting this option produces an ASCII file that is appended to by each processed form family batch as long as the ASCII output is going to the same directory.
  - **Master Form Name (master.txt):** The file name is the template file name. Selecting this option produces an ASCII file that is appended to by each processed form family image that is identified to a particular template. ASCII output must be going to the same directory.
  - **Data Image Name (#####.txt):** The file name is the image name. One ASCII file is output for each data image.
  - **Prompt For Output File When Batch Is Created:** The Scan/Import operator is prompted to specify the output file name. Only one ASCII file is created per batch. Records are appended to the file if the operator uses the same name for more than one batch and the output directory is the same.
  - **Document Set:** One file per document set is created. The ASCII file is named after the first image in the document set.

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**Access OCR for AnyDoc Form Family Management**

- **Custom File:** The file name is the file name and extension specified in the field to the right.
- 3 Select the **Substitute Batch Control Number for Batch ID in Output (txt and directories)** check box to use the batch control number in the output file names and directories.
  - 4 Select a radio button in the **Image Naming** section to specify how archived image files are named. Options include:
    - **System Assigned:** OCR for AnyDoc assigns image numbers automatically using Image Numbering settings.
    - **Prompt For Starting Sequence Number:** The Scan/Import operator is prompted to enter a starting sequence number for each batch.
    - **Use Imprinter String:** The scanner's imprinter string is used to number the images.
    - **Batch Control Number (User Assigned) + Sequential Number:** The user-defined batch control number plus a sequential number is used to number the images. The sequential number is a continuous number and is not the batch sequence number.
    - **Use Zone Output:** The archive image is named after the output value of one of the zones. If the related family has more than one template, then the selected zone must exist on every template in that family. If the zone is blank then the image will be named using the System Assigned option. If you select this option, click the **Select Zone** button to choose which zone to use. For more information, see [Use a Zone to Name an Image](#) (page [298](#)).
  - 5 Click **OK**.

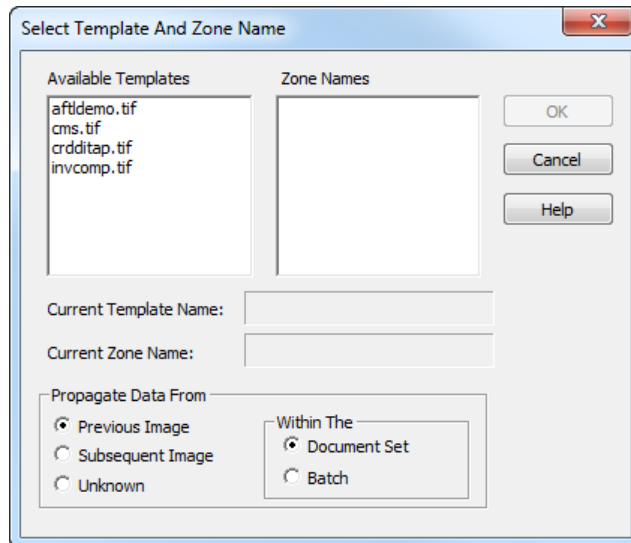
## Use a Zone to Name an Image

### Steps

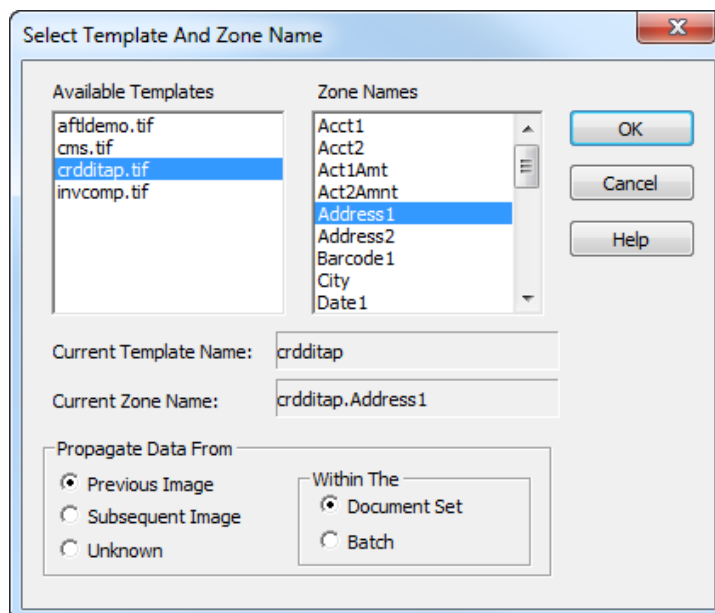
- 1 From **Directory/Output Settings**, click the **Use Zone Output** radio button, then the **Select Zone** button.

**Access OCR for AnyDoc Form Family Management**

The **Select Template And Zone Name** window is displayed.



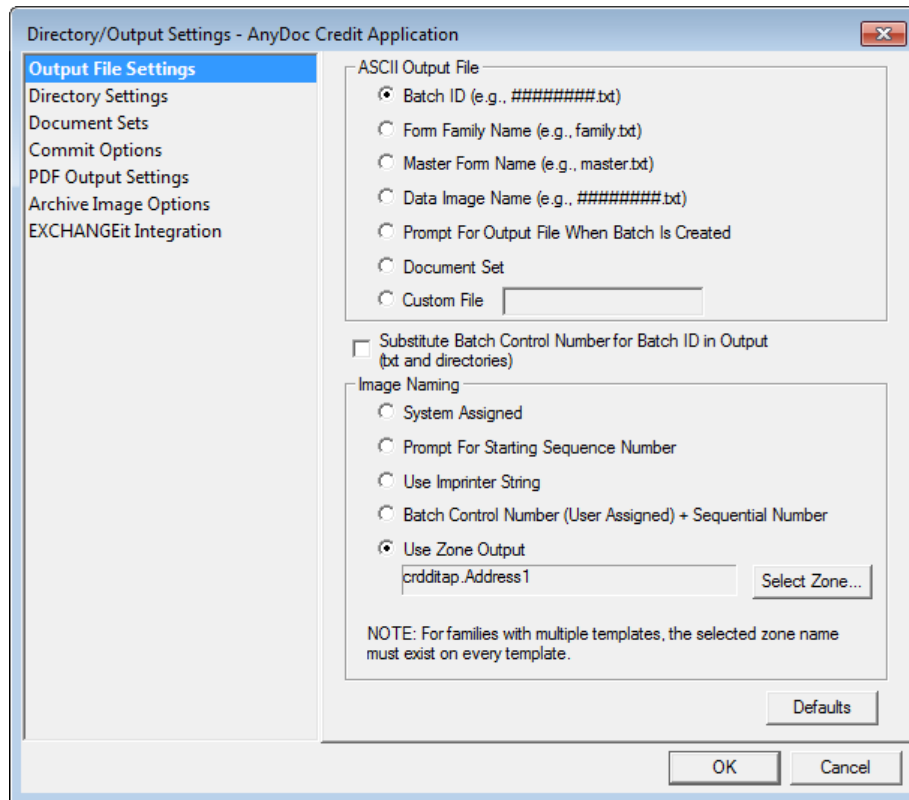
- 2 Select a template from the **Available Templates** field. A list of all zones associated with the template appear in the **Zone Names** field.



- 3 Double click the zone name to name the multi-page .TIF archive image. The selected zone name is displayed in the **Current Zone Name** field.

**Access OCR for AnyDoc Form Family Management**

- 4 Click **OK**. The template and zone names appear in the field to the right of Use Zone Output.

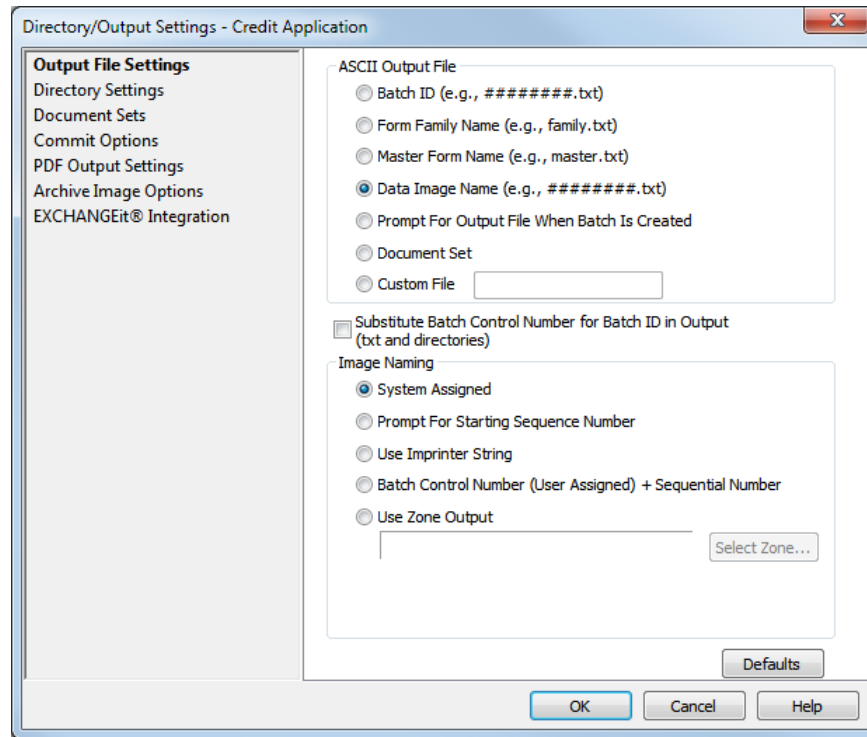


## Directory Settings

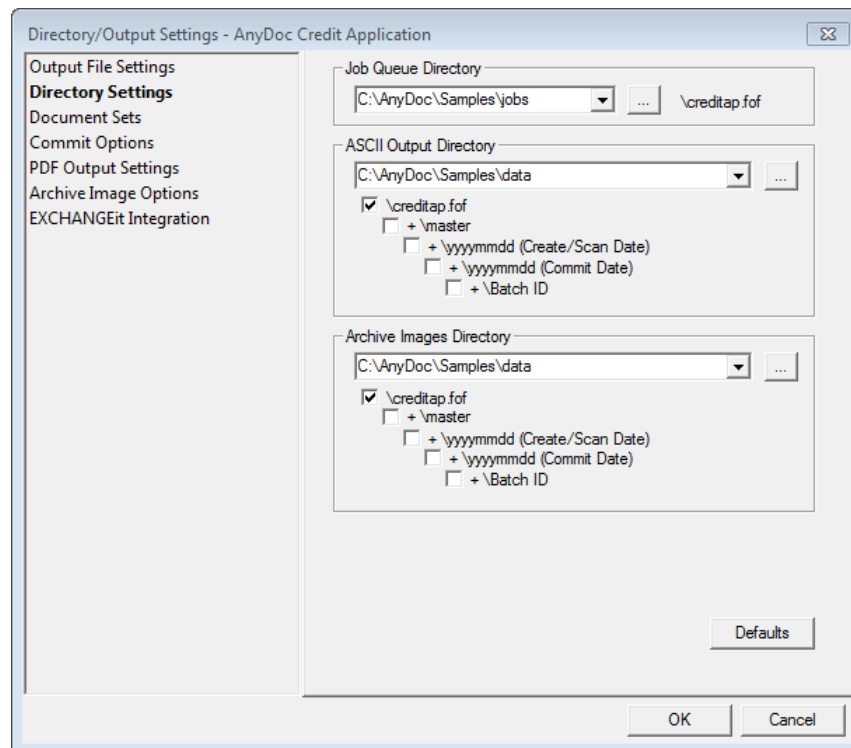
### Steps

## Access OCR for AnyDoc Form Family Management

- 1 Select **Settings | OCR for AnyDoc® Form Family Management | Directories/Output**. The Directory/Output Settings window is displayed.




- 2 Click the **Directory Settings** tab.



**Access OCR for AnyDoc Form Family Management**


- 3 Enter a location where the form family pending batches should be kept in the **Job Queue Directory** field

OR

Click  to browse to the location. An additional sub-directory with the same name as the form family is appended to the path.

- 4 Enter a location where form family ASCII files should be output in the **ASCII Output Directory** field


OR

Click  to browse to the location. To further specify the path, enable one or any combination of the check boxes below this field. Options include:

- **\formfamily.fof:** ASCII files are output to a subdirectory with the same name as the form family.
- **+\master:** ASCII files are output to a subdirectory with the same name as the template file name.
- **+\yyyymmdd:** ASCII files are output to a subdirectory named for the current year, month and day.
- **+\Batch ID:** ASCII files are output to a subdirectory with the same name as the Batch ID.

- 5 Enter a location where form family archive images should be output in the **Archive Images Directory** field

OR

Click  to browse to the location. To further specify the path, enable one or any combination of the check boxes below this field. Options include:

- **\formfamily.fof:** Images are output to a subdirectory with the same name as the form family.
- **+\master:** Images are output to a subdirectory with the same name as the template file name.
- **+\yyyymmdd:** Images are output to a subdirectory named for the current year, month and day.
- **+\Batch ID:** Images are output to a subdirectory with the same name as the Batch ID.

- 6 Click **OK**.

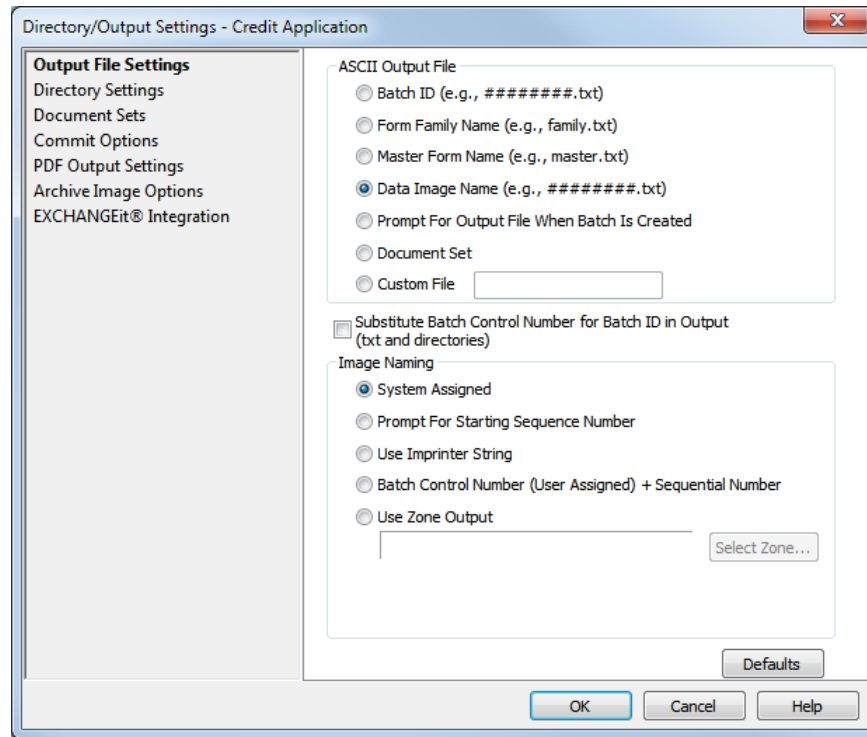
## Create Document Sets

### Steps

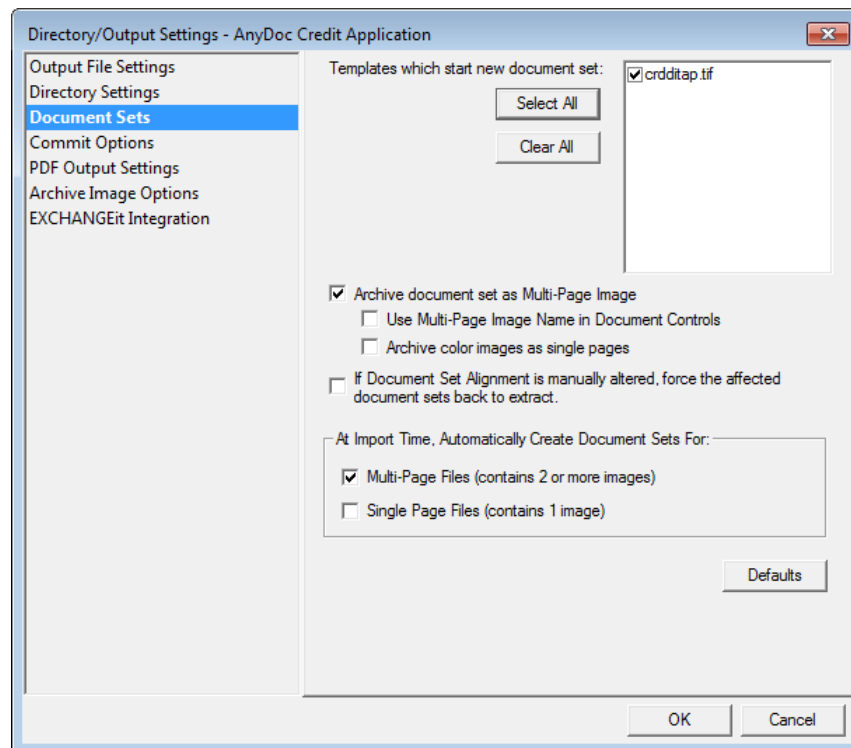


**Access OCR for AnyDoc Form Family Management**

- 1 Select **Settings | OCR for AnyDoc® Form Family Management | Directories/Output**. The Directory/Output Settings window is displayed.



- 2 Click the **Document Sets** tab.



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**Access OCR for AnyDoc Form Family Management**

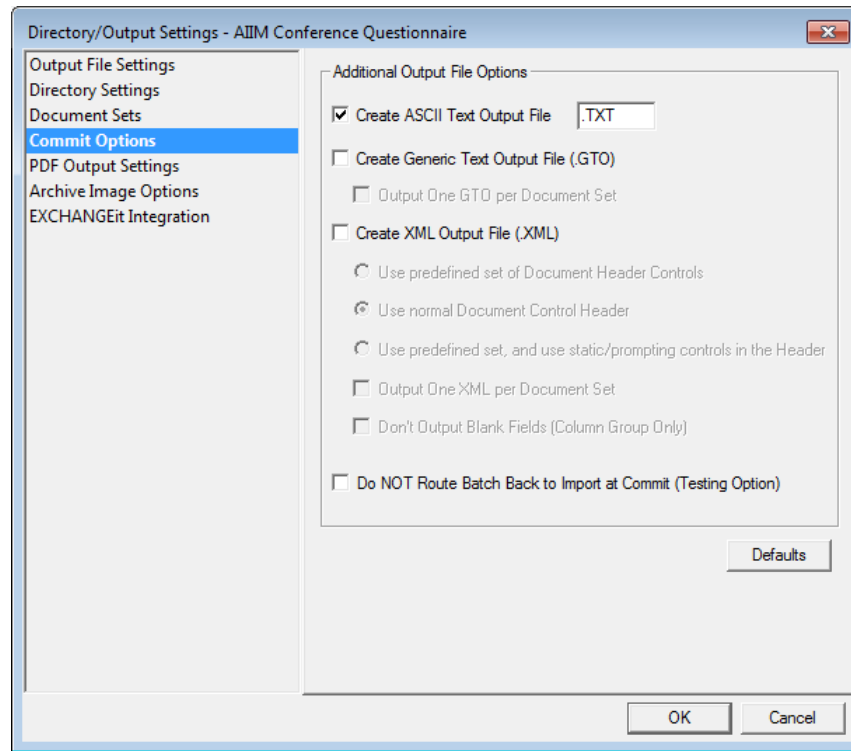
- 3 Enable the form family template(s) check box(es) that indicate the start of a new document set.
- 4 Click the **Select All** button to select all form family templates listed.
- 5 Click the **Clear All** button to clear all check boxes.
- 6 Enable the **Archive document set as Multi-Page Image** check box, if needed. If selected, each document set is archived as a multi-page TIFF or PDF.
- 7 Enable the **Use Multi-Page Image Name in Document Controls** to use the archived image associated with the document set for the document controls.
- 8 Enable **Archive color images as single pages** to output a single page image.
- 9 Enable the **If Document Set Alignment is manually altered, force the affected document sets back to extract** check box, if needed. Use this feature if you have dependencies between pages in a DocSet, such as an equation or a field propagated from one page to another. If selected, when a document set is manually redefined, the system sends it back to the Extract phase. For example, changing the start and end of a DocSet in View Images or Quality Assurance.
- 10 By default, multi-page import files are treated as document sets. In the At Import Time, Automatically Create Document Sets For section, clear the **Multi-Page Files (contains 2 or more images)** check box to break up multi-page TIFFs or PDFs at Import time. This option is generally used for faxes.
- 11 In the At Import Time, Automatically Create Document Sets For section, if the **Single Pages Files (contains 1 image)** check box is selected, each image is treated as one document set. This option can be used if you are importing "hard" document sets, such as faxes or multi-page image files, and you want them split up so that each image is separate.
- 12 Click **OK**.

## Commit Options

### Steps

- 1 Select **Settings | OCR for AnyDoc® Form Family Management | Directories/Output**.  
The **Directory/Output Settings** window is displayed.

- Click the **Commit Options** tab.



- Select the **Create ASCII Text Output File** check box to create an ASCII text file at Commit. If selected, specify the ASCII file extension. By default, this option is selected and a .TXT file is created.
- Select the **Create Generic Text Output File (.GTO)** check box to create a .GTO file at Commit in addition to the ASCII text file.
- Select the **Output One GTO per Document Set** check box to generate one .GTO file per document set at Commit.
- Select the **Create XML Output File (.XML)** check box to create a XML file at Commit in addition to the ASCII text file.
- Select a XML radio button to specify the header information for the .XML file. Options include:
  - Use predefined set of Document Control Headers:** This option uses a predefined set of document header controls. Selecting this option disables all document control headers (but no batch control headers) for XML output only. ASCII output still shows the normal document control headers, as does the .GTO file if it is used. This allows the predefined set to be included in the .XML output even if it is not in the other output forms.
  - Use normal Document Control Header:** This option uses the default document control headers used by ASCII and .GTO output. If this option is selected, the .XML files have the same headers as the ASCII and .GTO files.

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**Access OCR for AnyDoc Form Family Management**

- **Use predefined set, and use static/prompting controls in the Header:** This option uses the predefined set of document control headers in addition to the static and prompting document control headers used by the ASCII and .GTO output.
- 8 Select the **Output One XML per Document Set** check box to output one .xml file for the each document set.
  - 9 Select the **Don't Output Blank Fields (Column Group Only)** check box to skip blank fields during the output process. This reduces the XML file size.
  - 10 Select the **Do NOT Route Batch Back to Import at Commit (Testing Option)** check box to prevent batches from routing back to import at Commit.
  - 11 Click **OK**.

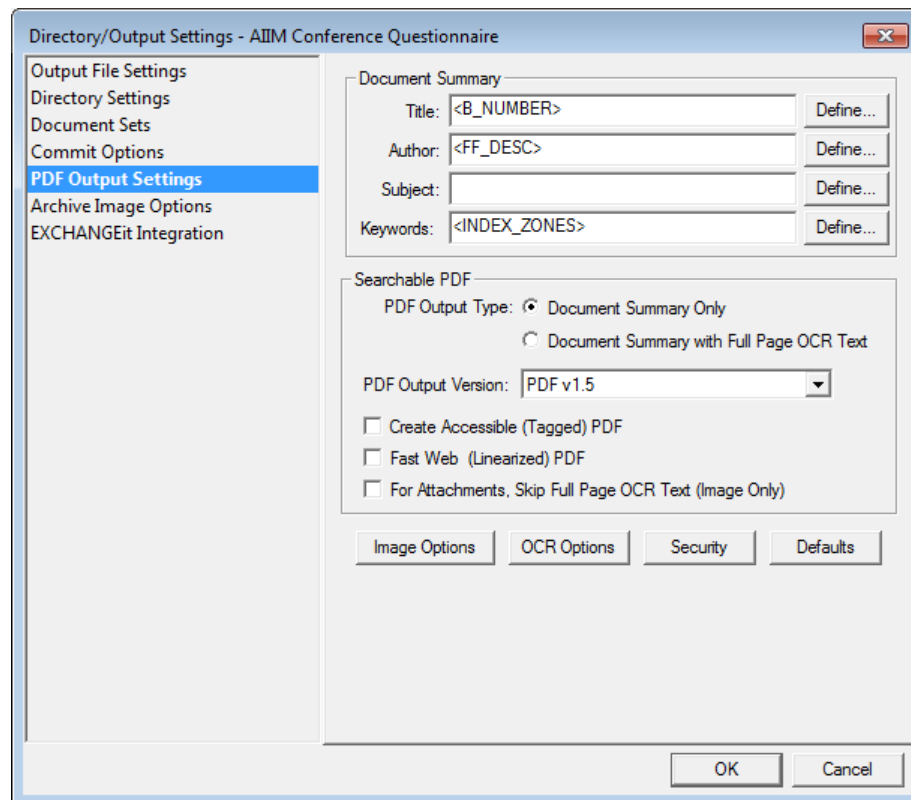
## PDF Output Settings

After the option to output a .pdf file is selected, there are additional settings that can be specified in **Directory/Output Settings | PDF Output Settings**.

### Steps

- 1 Select **Settings | OCR for AnyDoc Form Family Management | Directories/Output**. The **Directory/Output Settings** window is displayed.

- Click the **PDF Output Settings** tab.



For more information on PDF Output Settings, see:

- Document Summary (page [307](#))
- Searchable PDF (page [308](#))
- PDF Image Options (page [309](#))
- PDF OCR Options (page [310](#))
- PDF Security (page [311](#))

## PDF Document Summary

The Document Summary information is output to the Document Properties window in the output file. You can enter text in these fields or click **Define** to display the **Document Property** window, where you can further define and format the following fields:

- Title
- Author
- Subject

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**Access OCR for AnyDoc Form Family Management**

- Keywords

Specifically, you can:

- Define the variables you want to use in the definition string.  
In the **System Defined Control Fields** section, select a variable and click **Add Field**. The variable is added to the **Title Document Definition String**.
- Format date variables, if applicable.  
If a date variable is included in the **Title Document Definition String**, then the date can be formatted to your specifications. To format the date, click **Date Formatting** and select the date variable you want to format. In the **Date Format Settings** window, click the format you want to use and click **Add to Date Format**.

Set the options for searchable PDF in the **Searchable PDF** section.

**PDF Output Type**

The image can be output with no text (**Document Summary Only**) or with searchable text (**Document Summary with Full Page OCR Text**). If the image is created with searchable text, a full page OCR is done and the text is included in the .pdf file.

**PDF Output Version**

PDFs can be created using Adobe Acrobat versions 1.5, 1.6, or 1.7 (ISO 32000).

A PDF/A can be created using Adobe Acrobat version 1.4. There are three levels of PDF/A files:

- PDF/A (v1.4)
- PDF/A-2b
- PDF/A-2u

PDF/A-2b and PDF/A-2u are supported by AnyDoc. They ensure reliable reproduction of the document's appearance and create a tagged PDF, which includes the document structure. This ensures that the document content can be searched.

**Create Accessible (Tagged) PDF**

To create a tagged .pdf file, select this check box. A tagged .pdf file better accommodates different page and screen widths and also displays well on hand-held devices. This type of file is also more accessible by people with vision impairments.

**Fast Web (Linearized) PDF**

To create a PDF file that is Fast Web enabled, select this check box. Fast Web View allows each page of a PDF file to be downloaded from a web server individually, rather than waiting for the entire PDF file to be downloaded from a web server. This is most valuable with large documents that can take a long time to download from a server.

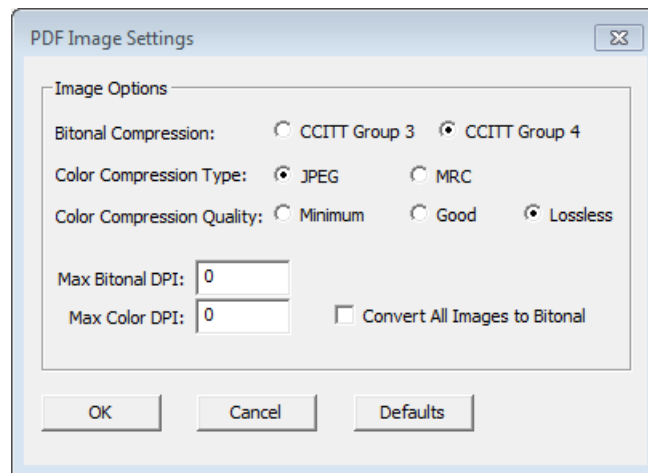
A .PDF document viewer with the Fast Web capability is required.

### For Attachments, Skip Full Page OCR Text (Image Only)

When creating a searchable PDF the full page OCR can be skipped for images on attachment pages, select this check box.

## PDF Image Options

When outputting to a .PDF file, the compression and resolution options for the image must be specified. The option to convert all color images to black and white is also available.



The available settings include:

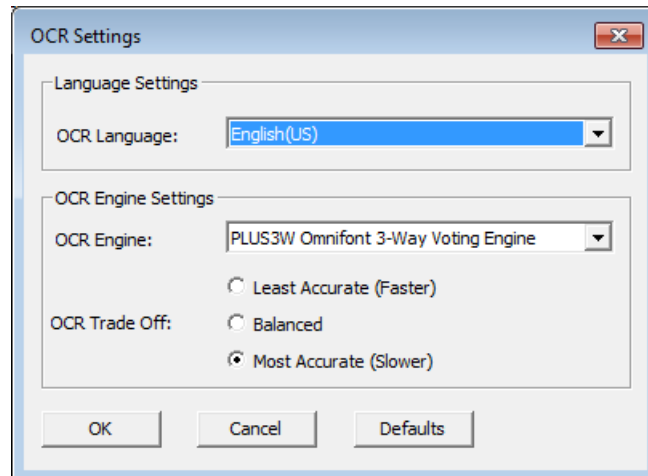
Option	Description
<b>Bitonal Compression</b>	The compression format that is applied to black and white images.
<b>Color Compression Type</b>	The compression type that is applied to color images. Options include: <ul style="list-style-type: none"> <li>• JPEG</li> <li>• MRC - Produces a smaller PDF than JPEG.</li> </ul>
<b>Color Compression</b>	The compression level that is applied to color images. Options include: <ul style="list-style-type: none"> <li>• Minimum - Produces the best compression possible with minimal image quality.</li> <li>• Good - Produces the best image image quality with a minimal amount of compression.</li> <li>• Lossless - Produces an acceptable amount of compression without reducing the image quality.</li> </ul>

**Access OCR for AnyDoc Form Family Management**

Option	Description
<b>Max Bitonal DPI</b>	The resolution that black and white images are converted to.
<b>Max Color DPI</b>	The resolution that color images are converted to.
<b>Convert All Images to Bitonal</b>	Select this check box to convert all color images to black and white.

## PDF OCR Options

Set the language and OCR engine settings on the PDF **OCR Settings** window. The OCR Engine settings determine the default Optical Character Recognition engine used to process machine print data.

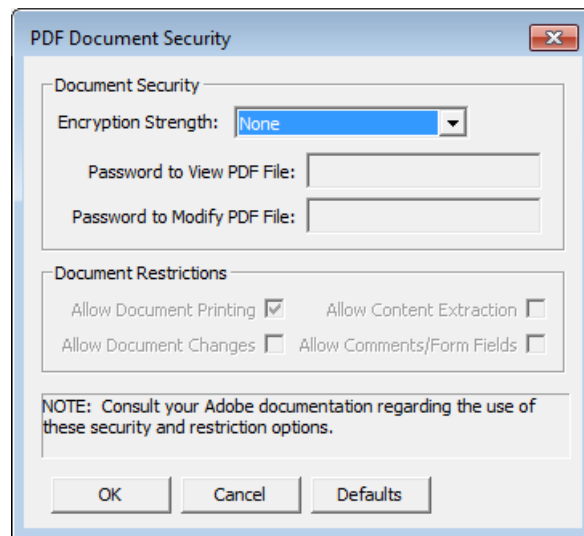


The available settings include:

Option	Description
<b>OCR Language</b>	Select the language corresponding to the expected form data.
<b>OCR Engine</b>	Select an engine. Available options depend on which engines are installed on your system.
<b>OCR Trade Off</b>	One engine can produce faster results than another engine but this could result in inaccurate OCR results. Therefore, it is important to determine the most important criteria (fast, balanced or slow) after an analysis of the accuracy of the data being output.



Set access permissions and user restrictions for the .pdf file on the **PDF Document Security** window.



The available settings include:

#### Document Security

Option	Description
<b>Encryption Length</b>	Select the length of the encryption key to be used if the file should be encrypted. To not apply encryption, select <b>None</b> . AES refers to the Advanced Encryption Standard of 256 bits.
<b>Password to View PDF File</b>	Specify an optional password necessary to open and view the PDF file. If a password is not specified anyone can view the PDF file.
<b>Password to Modify PDF File</b>	Specify an optional password necessary to modify the PDF file. If a password is not specified anyone can modify the PDF file.

#### Document Restrictions

Option	Description
<b>Allow Document Printing</b>	Select this check box to allow the PDF file to be printed.
<b>Allow Document Changes</b>	Select this check box to allow changes to the PDF file.
<b>Allow Content Extraction</b>	Select this check box to allow content to be copied from the PDF file.
<b>Allow Comments/Form</b>	Select this check box to allow comments or form fields to be added to the

**Access OCR for AnyDoc Form Family Management**

Option	Description
Fields	PDF file.

## Archive Image Options

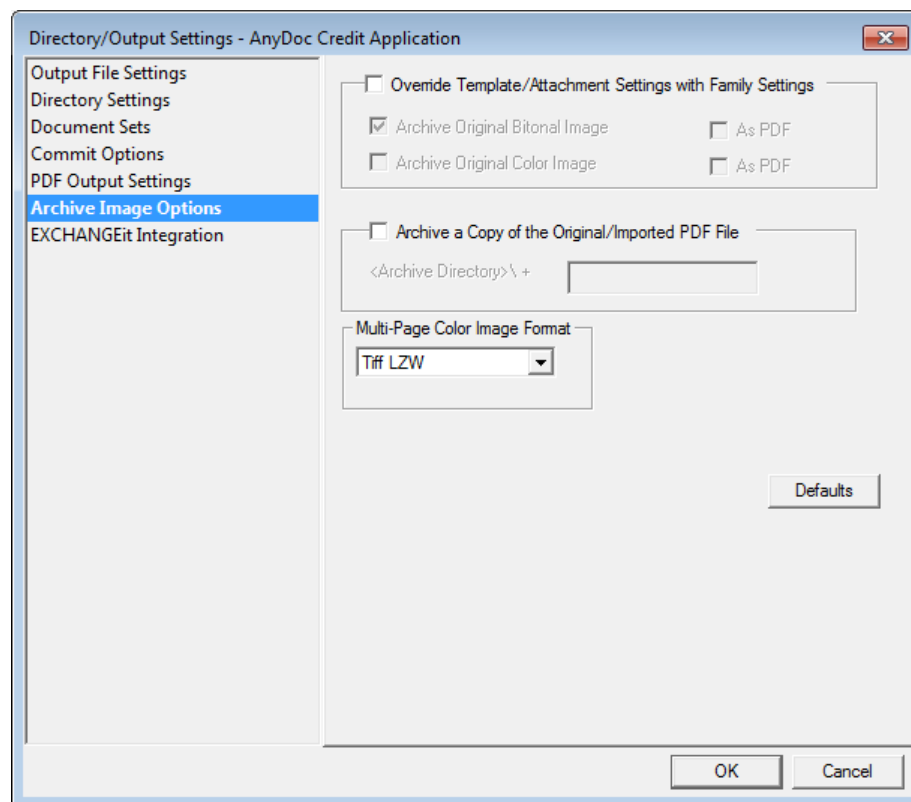
By default, output file options are configured at the template level. Options in the **Archive Image Options** dialog override the template and attachment settings.

### Steps

- 1 Select **Settings | OCR for AnyDoc® Form Family Management | Directories/Output**.

The **Directory/Output Settings** window is displayed.

- 2 Click the **Archive Image Options** tab.



Option	Description
<b>Override Template/Attachment Settings with Family</b>	Select this check box to apply these Form Family settings rather than the Template settings for all templates and attachments in the current form family.

## Access OCR for AnyDoc Form Family Management

Option	Description
<b>Settings</b>	
<b>Archive Original Bitonal Image</b>	Select this check box to save the bitonal image.
<b>As PDF</b>	When saving a bitonal image, select this check box to save the image as a PDF file. To save the image as a .TIF file, clear this check box.
<b>Archive Original Color Image</b>	Select this check box to save the color image.
<b>As PDF</b>	When saving a color image, select this check box to save the image as a PDF file. To save the .TIF or .JPG file, clear this check box.



If both **Archive Original Bitonal Image** and **Archive Original Color Image** are selected, the archive images for bitonal and color images are output in separate files.

Option	Description
<b>Archive a Copy of the Original/Imported PDF file</b>	Select this check box to save a copy of the original import images to a specified subfolder in the archive image directory.
<b>&lt;Archive Directory&gt;\+</b>	Specify the subfolder with the archive directory where the image copy should be saved.

Option	Description
<b>Multi-Page Color Image Format</b>	Select an option for compressing multi-page color images: <ul style="list-style-type: none"> <li>• TIFF LZW</li> <li>• TIFF JPEG 6</li> <li>• TIFF JPEG 7</li> </ul>

## EXCHANGEit Integration

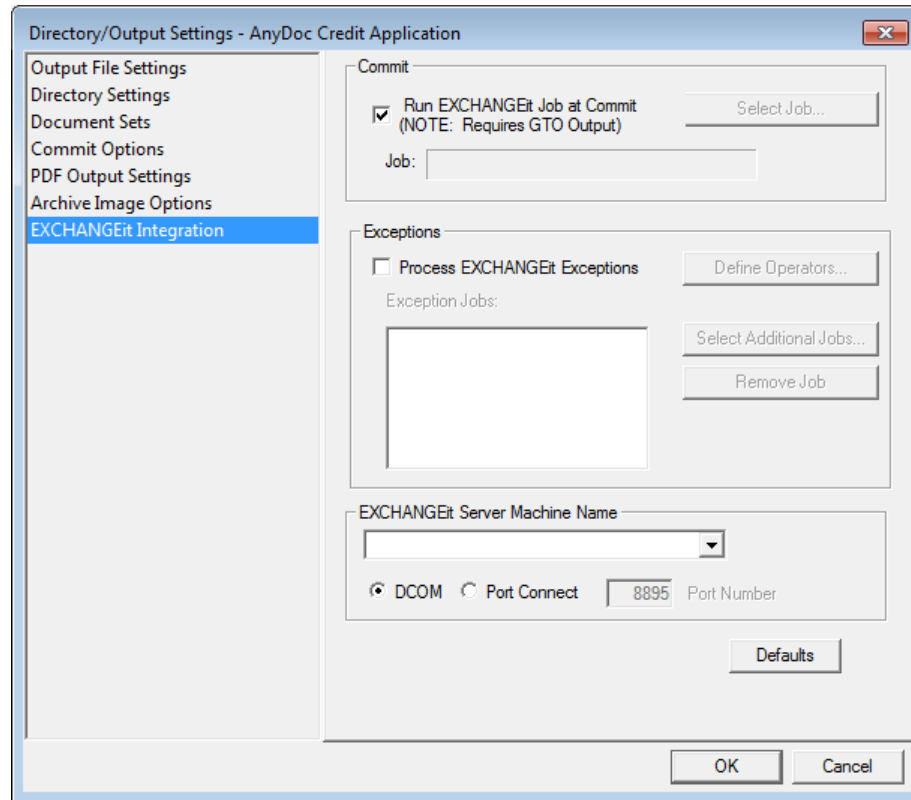
EXCHANGEit projects can be run automatically every time a batch is committed for a form family. You can also use this dialog box to configure EXCHANGEit exception handling.


**Access OCR for AnyDoc Form Family Management**

- 1 Select **Settings | OCR for AnyDoc® Form Family Management | Directories/Output**.

The **Directory/Output Settings** window is displayed.

- 2 Click the **EXCHANGEit Integration** tab.



Option	Description
<b>Run EXCHANGEit Job at Commit</b>	Select this check box to automatically run a specific EXCHANGEit project whenever a batch is committed for this Form Family.  <div data-bbox="750 1472 1292 1698" data-label="Text"> <p> This option requires .GTO output. For this check box to be available, the <b>Create Generic Text Output File (.GTO)</b> check box must be selected on the <b>Directory/Output Settings   Commit Options</b> tab.</p> </div>
<b>Select Job</b>	Click to select the EXCHANGEit project that will automatically be run. The <b>Select EXCHANGEit</b> window is displayed, listing the projects available. Select a project and click <b>OK</b> .

**Access OCR for AnyDoc Form Family Management**

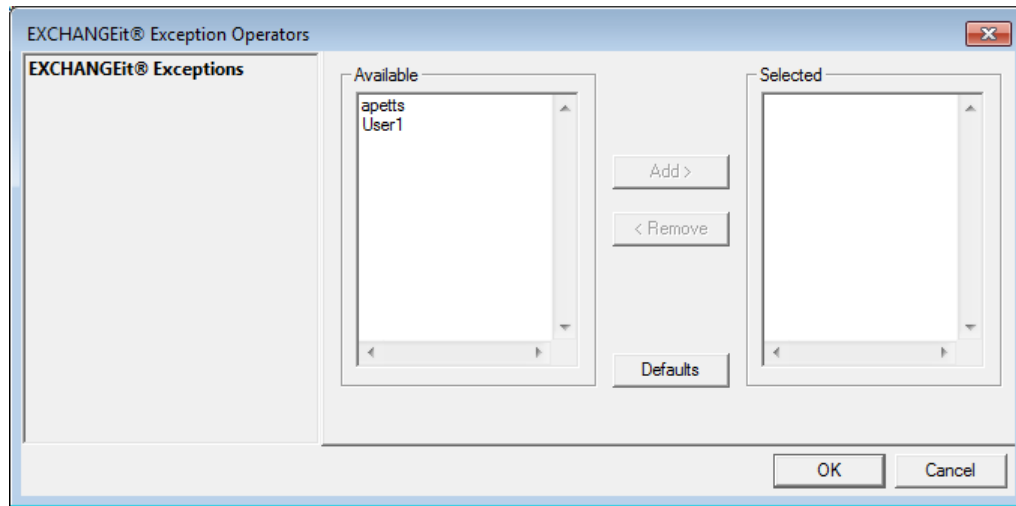
<b>Option</b>	<b>Description</b>
<b>Process EXCHANGEit Exceptions</b>	Select this check box to process EXCHANGEit exceptions from within OCR for AnyDoc. Processing an EXCHANGEit job from within OCR for AnyDoc requires EXCHANGEit version 5.1.3 or greater.
<b>Define Operators</b>	To allow only specific operators to process EXCHANGEit Exceptions, click this option. For more information about assigning operators, see Assign Operators to Process EXCHANGEit Exceptions (page <a href="#">315</a> ).
<b>Select Additional Jobs</b>	Click to select additional EXCHANGEit projects that will automatically be run. The <b>Select EXCHANGEit</b> window is displayed, listing the projects available. Select a project and click <b>OK</b> .
<b>Remove Job</b>	Select a job and click this option to remove the job from the Exceptions list.
<b>EXCHANGEit Server Machine Name</b>	Type or select the server hosting EXCHANGEit.
<b>DCOM</b>	Select to connect to EXCHANGEit using DCOM.
<b>Port Connect</b>	Select to connect to EXCHANGEit through the specified EXCHANGEit Server Port number instead of using DCOM. This requires EXCHANGEit version 5.1.2 or higher.

**Steps**

- 1 On the **Directory/Output Settings | EXCHANGEit Integration** tab, select the **Process EXCHANGEit Exceptions** check box.
- 2 Click **Define Operators**.

**Access OCR for AnyDoc Form Family Management**

The **EXCHANGEit® Exception Operators** window is displayed.



- 3 In the **Available** field, select an operator to assign permission to.
- 4 Click **Add**.  
The operator is displayed in the **Selected** field.
- 5 Click **OK**.

## Delete and Reroute Settings

The Delete/Reroute Settings window allows you to:

- Specify processing phases during which images may be deleted
- Determine what happens to deleted images
- Specify which form families are available to the Verification operator for re-routing misidentified images
- Determine what happens to re-routed images

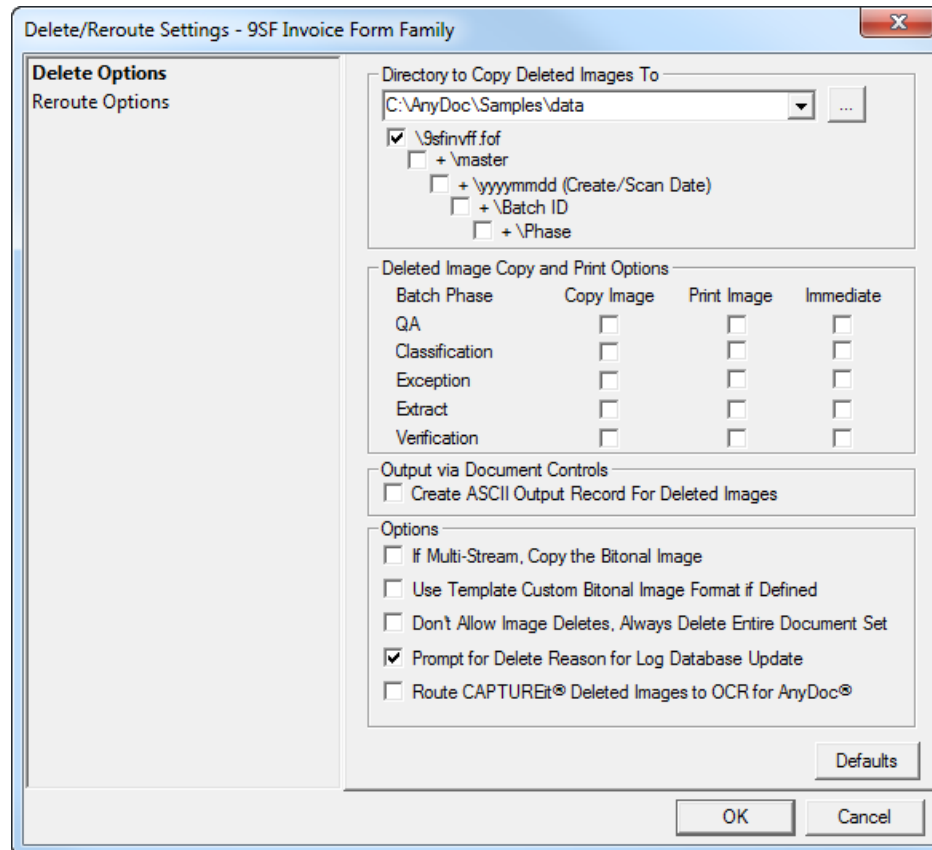
To access the Delete/Reroute Settings window, select **Management | Form Family Management | Delete/Reroute**.

## Delete Options

### Steps

## Access OCR for AnyDoc Form Family Management

- 1 Select **Settings | OCR for AnyDoc® Form Family Management | Delete/Reroute**. The **Delete/Reroute Settings** window is displayed.



- 2 Enter a location where deleted images should be archived in the **Directory to Copy Deleted Images To** field

OR

Click  to browse to the location.

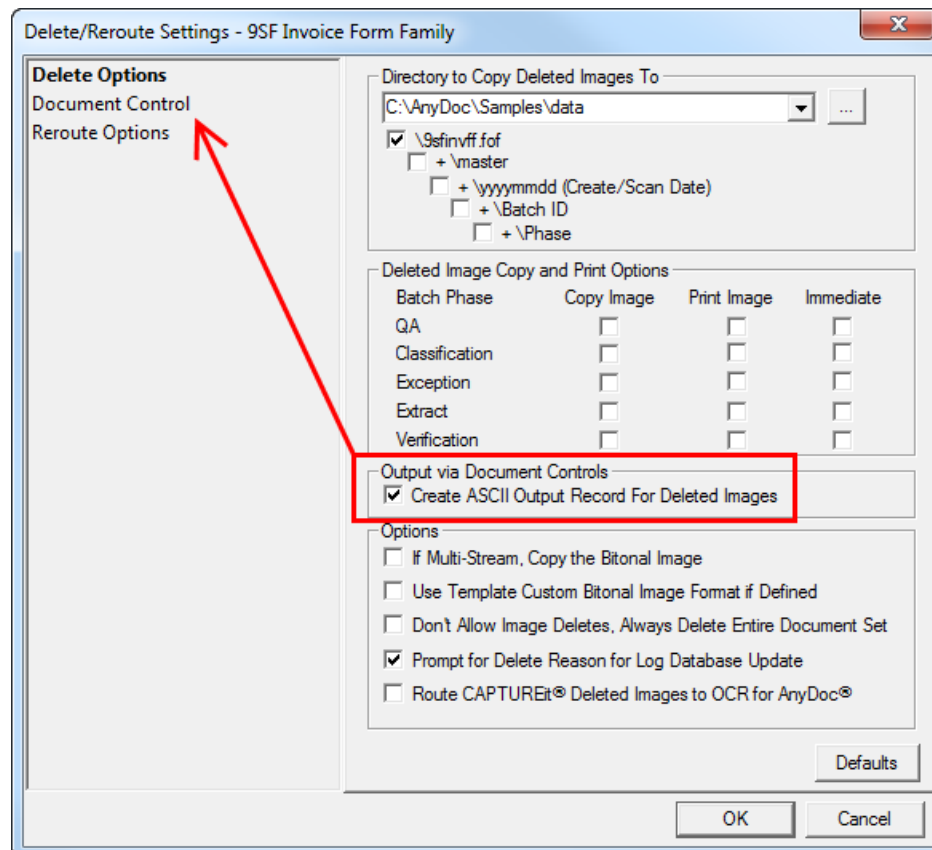
OR

Leave the path blank to permanently delete the images.

- 3 To add subdirectories to the location path, enable one or more check boxes below the **Directory to Copy Deleted Images To** field. Options include:
  - **\formfamily.fof**: The deleted images are placed into a subdirectory named after the form family.
  - **+\master**: The deleted images are placed in a subdirectory with the same name as the template file.
  - **+\yy\_mm\_dd**: Deleted images are placed in a subdirectory named for the current year, month and day.

**Access OCR for AnyDoc Form Family Management**

- **\Batch ID:** Deleted images are placed in a subdirectory with the same name as the batch ID.
  - **\Phase:** Deleted images are placed in a subdirectory with the name of the processing phase in which they were deleted.
- 4 Enable check boxes within the **Deleted Image Copy and Print Options** section to specify during what phases images can be deleted and the action to be taken with the deleted images. Options include:
- **Copy Image:** Enable to archive the deleted image. The image is moved to the configured directory when the batch is committed.
  - **Print Image:** Enable to automatically print the images using the user's default printer.
  - **Immediate:** Enable to move deleted images to the configured directory or completely remove the images as soon as the Delete button is clicked.
- 5 Select the **Create ASCII Output Record for Deleted Images** check box, if necessary. The **Document Control** tab is available when this check box is selected. Through the **Document Control** tab you can change the ASCII output for deleted images. For more information, see Document Control Options (Delete and Reroute Settings) (page [319](#)).





- 6 Enable the **If Multi-Stream, Copy the Bitonal Image** check box to create a copy of the bitonal image instead of the color image when deleting images.
- 7 Enable the **Use Template Custom Bitonal Image Format if Defined** check box to convert deleted images to the custom image archive format specified for the template(s).
- 8 Enable the **Don't Allow Image Deletes, Always Delete Entire Document Set** check box to prevent operators, during phases such as verification, from deleting individual images out of a document set; the user is only allowed to delete the whole DocSet. When this feature is disabled, users have the option of deleting either an individual image or an entire document set.
- 9 Enable the **Prompt for Delete Reason for Log Database Update** check box to prompt the operator for a reason when deleting an image.
- 10 Enable the **Route CAPTUREit Deleted Images to OCR for AnyDoc** check box to import a copy of the deleted CAPTUREit images to OCR for AnyDoc.
- 11 Click **OK**.

## Document Control Options

The **Delete/Reroute Settings | Document Control** tab allows you to include ASCII data—such as the date, time, operator, or batch information—in the output record for deleted images.

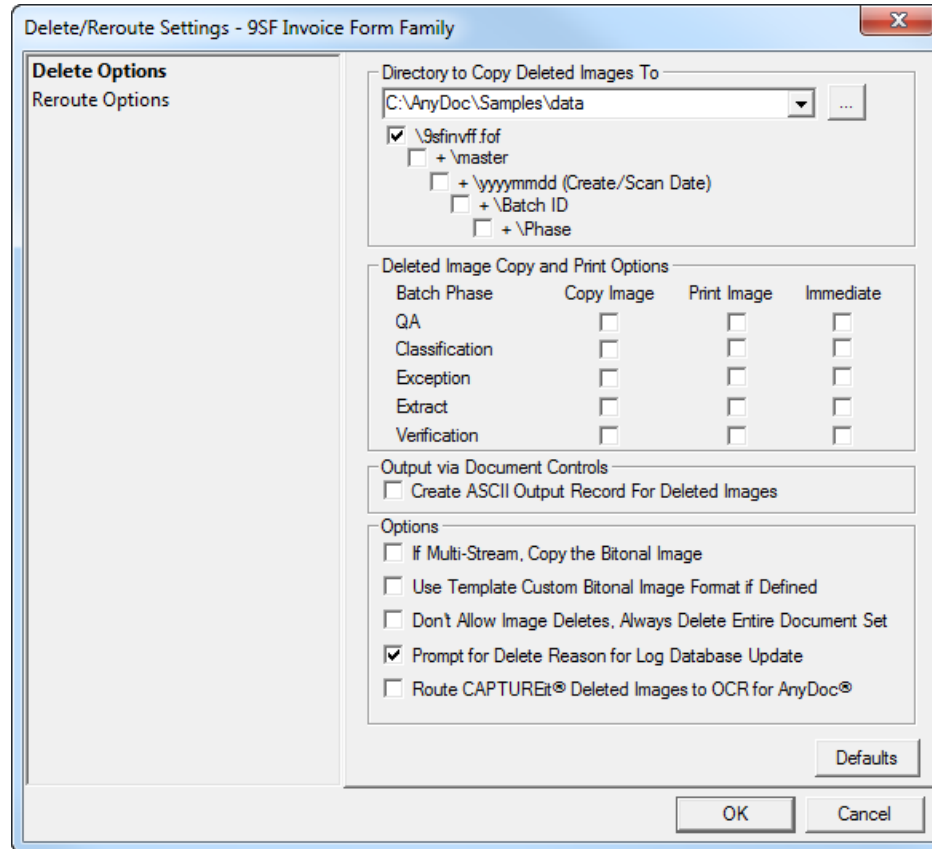


The **Document Control** tab is only available if the **Create ASCII Output Record For Deleted Images** check box is selected on the **Delete Options** tab.

### Steps

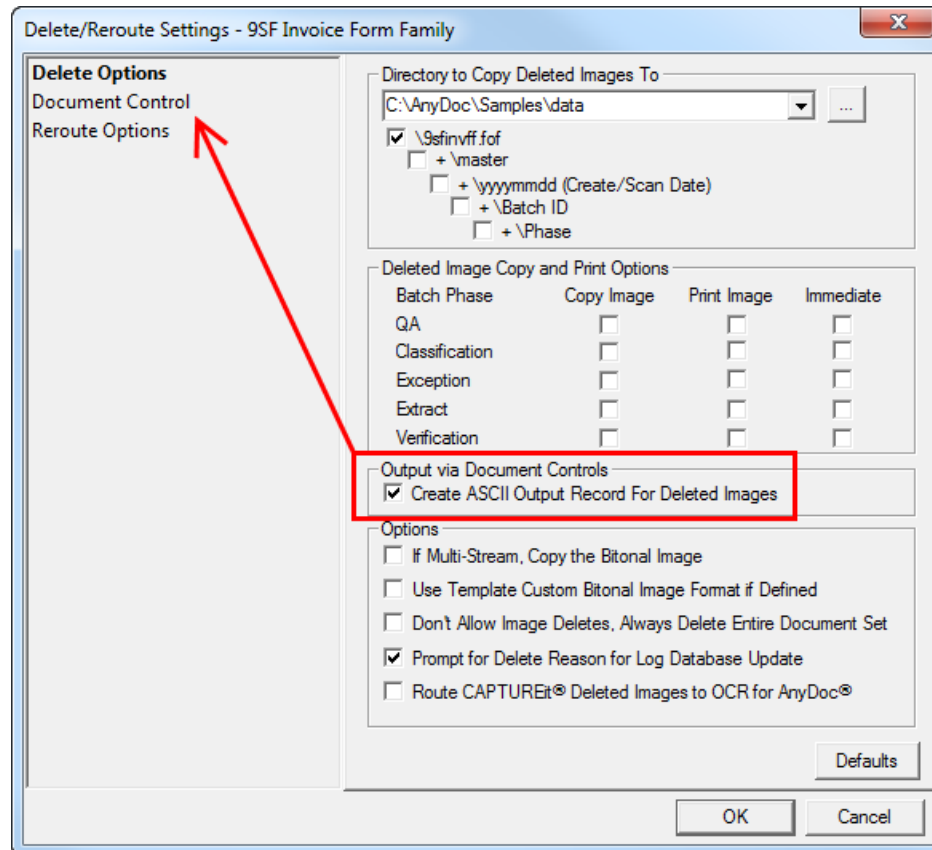
**Access OCR for AnyDoc Form Family Management**

- 1 Select **Settings | OCR for AnyDoc® Form Family Management | Delete/Reroute**. The **Delete/Reroute Settings | Delete Options** tab is displayed.



**Access OCR for AnyDoc Form Family Management**

- 2 Select the **Create ASCII Output Record For Deleted Images** check box. The **Document Control** tab becomes available.



**Access OCR for AnyDoc Form Family Management**

- 3 Click the **Document Control** tab.

The Document Control Expression field contains the information that is output to ASCII. You can add field(s) from the System Defined Control Fields list below by clicking a field in the list, then clicking the **Add Field** button. The expression for the selected field is displayed here. You can also:

- Add a static literal to the document control by typing the literal text between angle brackets, i.e., <This is a static literal>
- Propagate output from one of the templates in the form family as a document control for deleted images.
- Create prompting document control fields, where users are prompted to enter information at Scan or Import time that is captured and output as a document control for deleted images.

- 4 Select an option from the **System Defined Control Fields** list and click **Add Field**. The field is added to the **Document Control Expression** field. Options in the System Defined Control Fields list include:

Field	Expression	Output / Description
Auto ID Rotation	<S_IDROTATION>	Outputs the rotation (0°, 90°, 180°, or

## Access OCR for AnyDoc Form Family Management

Field	Expression	Output / Description
		270°) of the data image.
Batch Auto Total (Batch Equation Calculated)	<B_AUTOTOTAL>	Outputs the total amount for a batch total equation without having to define the result.
Batch Auto Total 2 (Calculated)	<B_AUTOTOTAL2>	Outputs the total amount for an equation without having to define the result.
Batch Auto Total 3 (Calculated)	<B_AUTOTOTAL3>	Outputs the total amount for an equation without having to define the result.
BancTec/SpeedFirst Batch Input Fields (ONX)	<BANCTEC_ONX>	Outputs information created when scanning from a BancTec scanner.
Batch Control Number (User Assigned)	<B_CTRL_NUMBER>	Outputs the user-defined batch control number.
Batch Date	<B_DATE>	Outputs the date the batch was created.
Batch ID (System Assigned)	<B_NUMBER>	Outputs the system assigned batch number.
Batch Operator	<B_OPER>	Outputs the network ID of station that created the batch, or if logins are used, the user name.
Batch Sequence Nbr #####	<S_BSEQ>	Outputs the sequence number of the image within the batch as a 4-digit number. For example, the third image in the batch would output "0003".
Batch Sequence Nbr #####	<S_BSEQ_05>	Outputs the sequence number of the image within the batch as a 5-digit number. For example, the third image in the batch would output "00003".
Batch Time	<B_TIME>	Outputs the time in hour:minute:second format that the batch was created.
Batch Total (Prompted)	<B_TOTAL>	Outputs the result of a defined batch total equation.
CAPTUREit Batch ID	<ASI_CAPTURE_BATCH_ID>	Outputs the batch ID from CAPTUREit if the batch was scanned with CAPTUREit.

**Access OCR for AnyDoc Form Family Management**

<b>Field</b>	<b>Expression</b>	<b>Output / Description</b>
Document Nbr 1 #####	<DOC_F1>	Outputs the image's file name.
Document Nbr 2 c:\..\#####.tif	<DOC_F2>	Outputs the fully qualified path and image file name with .tif extension after Commit.
Document Nbr 3 #####.tif	<DOC_F3>	Outputs the image's file name with .tif extension after Commit.
Document Set AutoTotal	<DS_AUTOTOTAL>	Outputs the total value for an equation per Document Set.
Document Set Number in Batch	<DS_NBR_IN_BATCH>	Outputs the sequence of the document set within the batch.
Document Set Page Sequence	<DS_PGSEQ>	Outputs the sequence of the page within the document set.
Document Set Total Number of Pages	<DS_TOTAL>	Outputs the total number of pages in the document set.
Extract Date	<X_DATE>	Outputs the date the image was extracted.
Extract Operator	<X_OPER>	Outputs the network ID of the extraction station, or if logins are used, the user name.
Extract Time HH:MM:SS	<X_TIME>	Outputs the time in hour:minute:second format that the image was extracted.
Image Creation Date	<I_DATE>	Outputs the date the image was imported into the system.
Image Creation Time HH:MM:SS	<I_TIME>	Outputs the time the image was imported into the system.
Imprinter String	<S_IMPRINTER>	Outputs the imprinter string configured under <b>Settings   Scanner Setup   Imprinter</b> .
Number of Doc Sets	<B_NBR_OF_DOCSETS>	Outputs the total number of document sets in the batch.
Number of Documents	<B_NBR_OF_DOCS>	Outputs the total number of images in the batch.
Number of Line Items	<B_NBR_OF_LINEITEMS>	Outputs the number of total line items in an AnyApp template.

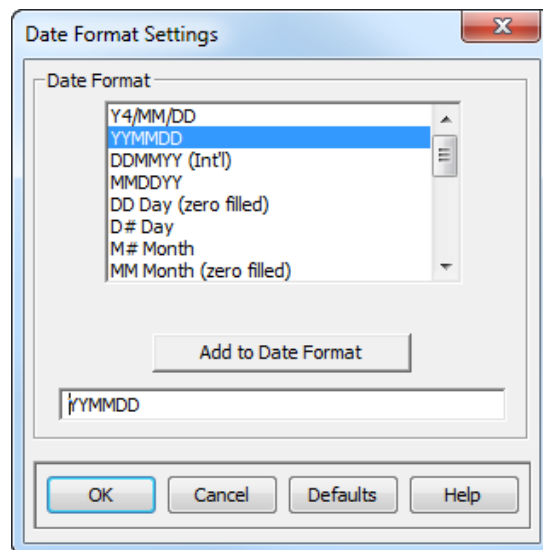
## Access OCR for AnyDoc Form Family Management

Field	Expression	Output / Description
Number of Total Sets	<B_NBR_OF_TOTALSETS>	Outputs the number of total sets in an AnyApp template.
Orig Doc Multi-Page Sequence	<ORIG_DOC_SEQ>	Outputs the sequence of the image from within a multipage tiff.
Orig Doc Nbr 1 #####	<ORIG_DOC_F1>	Outputs the imported image's original file name.
Orig Doc Nbr 2 c:\..\#####.tif	<ORIG_DOC_F2>	Outputs the fully qualified path and the original image's file name with .tif extension after Commit.
Orig Doc Nbr 3 #####.tif	<ORIG_DOC_F3>	Outputs the imported image's original file name followed by the extension .tif.
Orig PDF Archive Copy 2 c:\..\#####.pdf	<ARCHIVE_ORIG_DOC_F2>	Outputs the fully qualified archive path and subdirectory of the original image copy and the original .pdf file name. The archive directory location is set on the <b>Directories/Output Settings   Archive Image Options</b> window.
Previous Index Fields	<PREV_INDEX_FIELDS>	This applies to attachments only. Any index fields on the previous data image are output in the document control expression for the attachment.
QA Date	<Q_DATE:MM/DD/YY>	Outputs the date the batch was reviewed by the QA Operator.
QA Operator	<Q_OPER>	Outputs the user name of the QA operator.
QA Time HH:MM:SS	<Q_TIME>	Outputs the time in hour:minute:second format that the batch was released by the QA phase.
Scan/Import Operator	<S_OPER>	Outputs the user name of the Scan or Import station.
ScanErrors	<SCAN_ERRORS>	Outputs any messages of scan errors that occurred during the scan time.
ScanErrorsTime	<SCAN_ERROR_TIME>	Outputs the time that the scan error occurred.

**Access OCR for AnyDoc Form Family Management**

<b>Field</b>	<b>Expression</b>	<b>Output / Description</b>
ScanTotalTime	<SCAN_TOTAL_TIME>	Outputs the total amount of time to scan the batch.
System Import Date MM/DD/YY	<S_DATE>	Outputs the date the image was Imported by OCR for AnyDoc.
System Import Time	<S_TIME>	Outputs the time in hour:minute:second format that the image was scanned or imported.
Template Name	<FRM_ID>	Outputs the file name (no extension) of the master form template the current data image has been identified as matching.
Verify Date	<V_DATE>	Outputs the date the image was verified.
Verify Operator	<V_OPER>	Outputs the user name of the Verification operator.
Verify Time HH:MM:SS	<V_TIME>	Outputs the time in hour:minute:second format that the image was verified.

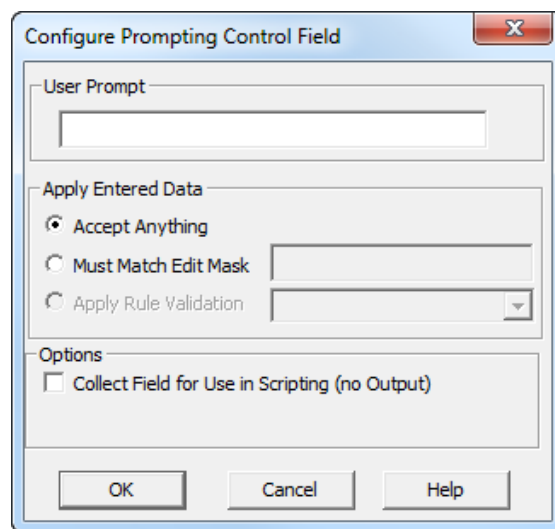
- 5 To set the output format for a date field in the Document Control Expression, click the **Date Formatting** button and select the date field to format. The **Date Format Settings** window is displayed.



- 6 Select a **Date Format** and click **Add to Date Format**. The selected date format is displayed in the field below the Add to Date Format button.



- 7 Click **OK** to close the **Date Format Settings** window and return to the **Document Control** tab. The system-defined date field has been updated with the date format (for example, <B\_DATE> could be formatted <B\_DATE:YYMMDD>).
- 8 To copy output from a zone on one template into the document control expression for all templates in the form family, click the **Propagate Output From Another Template** button. The **Select Template And Zone Name** window is displayed. See **Propagate Output from Another Template** (page [328](#)).
- 9 To prompt the operator to add information to the control expression, click the **Add Prompting Control** button. The **Configure Prompting Control Field** window is displayed.



- 10 Enter text into the **User Prompt** field with which to prompt the Scan or Import operator.
- 11 Enable a radio button in the **Apply Entered Data** section to set limits on what data is valid in the prompting control field. Options include:
  - **Accept Anything:** The system does not restrict what the operator enters in the field.
  - **Must Match Edit Mask:** The data entered by the operator in the field must match the edit mask entered in the field to the left of this radio button.
  - **Apply Rule Validation:** This option only applies to dates. It restricts the format of the date entered by the operator to the required format selected from the drop down list to the left of the radio button.
- 12 Click **OK** to close the **Configure Prompting Control Field** window. Enable the **Insert delimiter character(s)** check box to insert the delimiters entered in the **before** and **after** fields. The characters entered in the **before** and **after** fields are placed before and after each field in the output record.

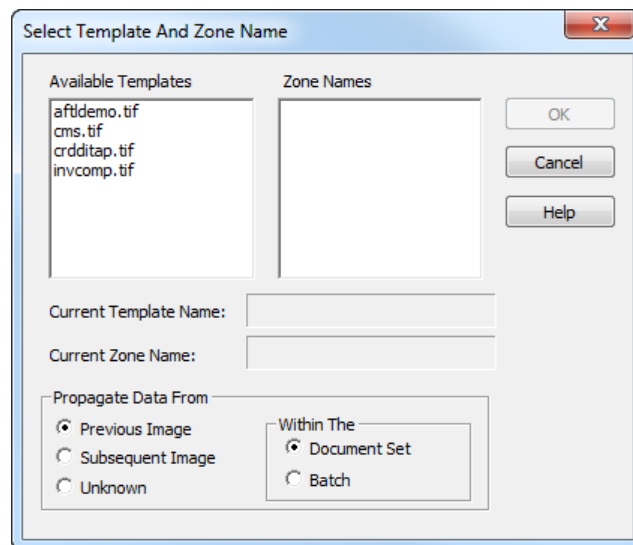
**Access OCR for AnyDoc Form Family Management**

- 13** Enter a character in the **Terminate Batch Header Record with** field to specify the character that indicates the end of the physical record in the ASCII output. Options include:
- A null character
  - \t to output a tab
  - \r or \n to output a carriage return
  - \f to output a form feed
- 14** Click **OK** to close the **Delete/Reroute Settings** window.

## Propagate Output from Another Template

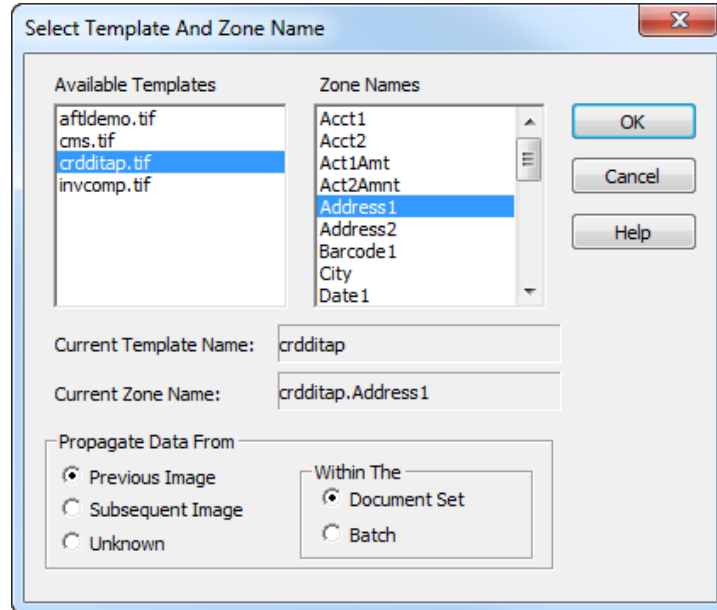
### Steps

- 1** From the **Document Control** tab, click the **Propagate Output From Another Template** button. The **Select Template And Zone Name** window is displayed.



**Access OCR for AnyDoc Form Family Management**

- 2 Select an **Available Template** from the list. This field displays all templates in the form family. The **Zone Names** field populates with the zones associated with the selected template.

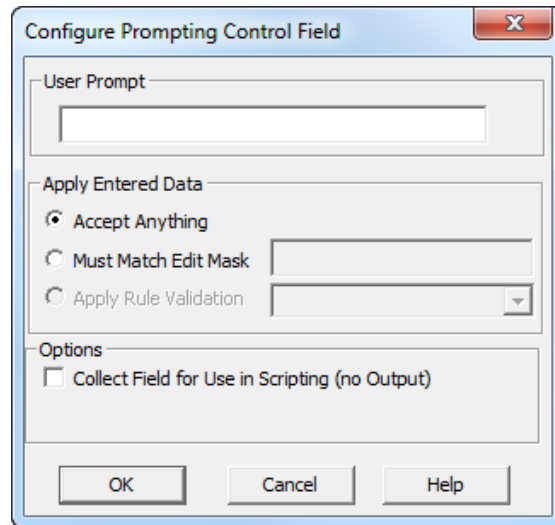


- 3 Double-click each zone name to add to the document control expression.
- 4 Enable a radio button in the **Propagate Date From** section to specify where the data image for the selected template is in the batch. Options include:
  - **Previous Image:** If the zone is located on the previous image in the doc set or batch.
  - **Subsequent Image:** If the zone is on the page after the current page in the doc set or batch.
  - **Unknown:** If the zone is on an image either before or after the current page.
- 5 Enable one of the radio buttons in the **Within The** section to determine whether the application looks in the **Document Set** or the **Batch** for the page containing the specified zone.
- 6 Click **OK** to close the **Select Template And Zone Name** window.

**Access OCR for AnyDoc Form Family Management**

## Configure Prompting Control Field

- 1 To prompt the operator to add information to the control expression, click the **Add Prompting Control** button. The **Configure Prompting Control Field** window is displayed.



- 2 Enter text into the **User Prompt** field with which to prompt the Scan or Import operator.
- 3 Enable a radio button in the **Apply Entered Data** section to set limits on what data is valid in the prompting control field. Options include:
  - **Accept Anything:** The system does not restrict what the operator enters in the field.
  - **Must Match Edit Mask:** The data entered by the operator in the field must match the edit mask entered in the field to the left of this radio button.
  - **Apply Rule Validation:** This option only applies to dates. It restricts the format of the date entered by the operator to the required format selected from the drop down list to the left of the radio button.
- 4 Click **OK** to close the **Configure Prompting Control Field** window.

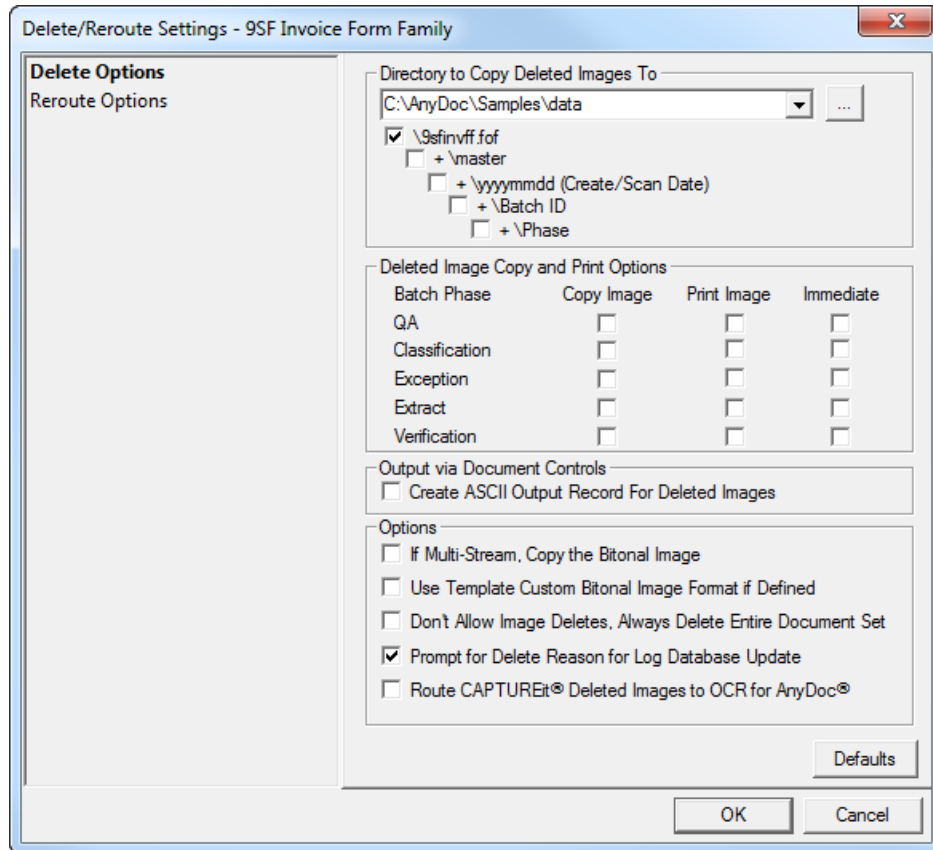
## Reroute Options

### Steps

- 1 Select **Settings | OCR for AnyDoc® Form Family Management | Delete/Reroute**.

**Access OCR for AnyDoc Form Family Management**

The **Delete/Reroute Settings** window is displayed.



**Access OCR for AnyDoc Form Family Management**

- Click the **Reroute Options** tab.

The screenshot shows a dialog box titled "Delete/Reroute Settings - 9SF Invoice Form Family". It has two tabs: "Delete Options" and "Reroute Options", with "Reroute Options" being the active tab. The dialog is divided into three main sections: "Route To Import For", "Reroute When", and "Options".

- Route To Import For:** Contains three radio buttons: "Current Form Family" (selected), "Selection From All Form Families", and "Selection From Select List" (with a "Select List..." button next to it).
- Reroute When:** Contains two radio buttons: "Immediate (end of current phase)" and "At Commit Time" (selected).
- Options:** Contains several checkboxes:
  - "Do Not Retain Any Classification Information" (unselected)
  - "Retain Form Classification; Import Directly to Extraction" (selected)
  - "Prompt Verifier to Retain Form Classification" (checked)
  - "Retain Classification of Attachments Only" (unselected)
  - "Suspend Imported Batch" (unselected)
  - "Prioritize Imported Batch" (checked)
  - "One Document Set Per Routed Batch" (unselected)

At the bottom, there is a "Research Queue" dropdown menu set to "(none)", a "Defaults" button, and "OK" and "Cancel" buttons.

- Enable a radio button in the **Route To Import For** section to specify the location where the form family images can be rerouted. Options include:
  - Current Form Family:** Reroutes the document sets to the current form family's Import directory.
  - Selection From All Form Families:** The Verification operator reroutes images from the current form family to another form family. Images are routed to the Import directory of the selected form family.
  - Selection From Select List:** The Verification operator reroutes images to a selected list of form families. For more information, see [Reroute Family List](#) (page [333](#)).
- Enable a radio button in the **Reroute When** section to specify when images can be moved to the Import directory for the specified form family. Images can either be moved immediately at the end of current batch processing phase or at Commit.
- Enable the **Do Not Retain Any Classification Information** check box to prevent classification information from being retained when routing to another Form Family.

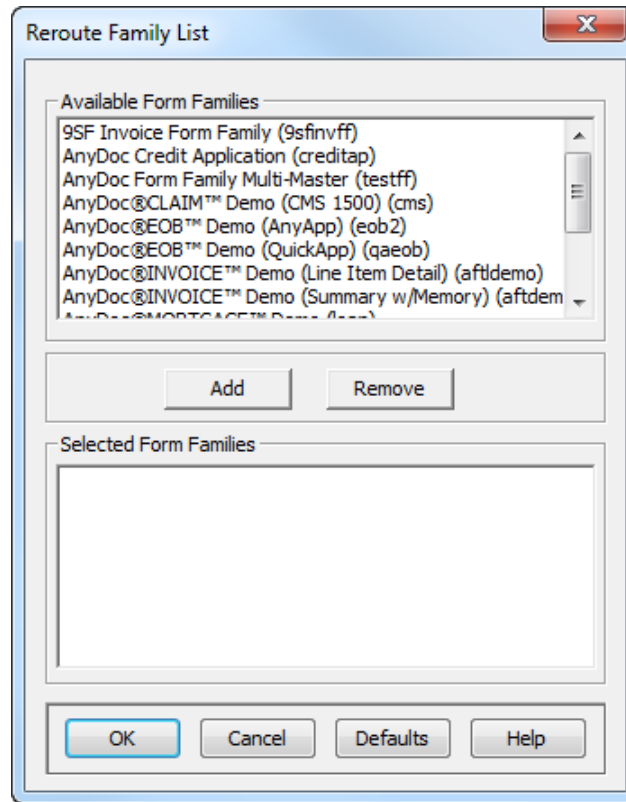
- 6 Enable the **Retain Form Classification; Import Directly to Extract** check box to send rerouted images directly to Extract. This bypasses Import, Classification, etc. and retains the original template ID.
- 7 Enable the **Prompt Verifier to Retain Form Classification** check box to prompt the Verification operator to choose whether the rerouted images should retain their current form classification.
- 8 Enable the **Retain Classification of Attachments Only** check box to only retain template classification information on images identified as an attachment.
- 9 Enable the **Suspend Imported Batch** check box to suspend batches or rerouted images from the processing flow until reactivated.
- 10 Enable the **Prioritize Imported Batch** check box to prioritize rerouted image batches over existing, non-prioritized batches.
- 11 Enable the **One Document Set Per Routed Batch** check box so that if a document set is rerouted out of the current batch, then that document set creates its own batch. If this option is not selected, that document set is routed to the same batch as the other document sets.
- 12 In the **Research Queue** drop-down select list, specify the form family to be used as a research queue.
- 13 Click **OK**.

## Reroute Family List

### Steps

**Access OCR for AnyDoc Form Family Management**

- 1 From the **Delete/Reroute Settings | Reroute Options** tab, click the **Select List** button. The **Reroute Family List** window is displayed.



- 2 To add a form family that the Verification operator can send a rerouted image, highlight the form family in the **Available Form Families** field and click **Add**. The form family is displayed in the Selected Form Families field.
- 3 To remove a form family from the Selected Form Families field, highlight the form family to remove and click **Remove**. The form family is removed from the Selected Form Families field and returned to the Available Form Families field.
- 4 Click **OK** to close the **Reroute Family List** window.

## Scan/Import Options

Through the Scan/Import Options window you can:

- Set parameters for handling images that are smaller or larger than the expected size
- Configure patch pages
- Split images
- Set options to capture images and archive them without extracting data



To access the Scan/Import Options window, select **Settings | OCR for AnyDoc® Form Family Management | Scan/Import**.

## Scan/Import Options

### Steps

- 1 Select **Settings | OCR for AnyDoc® Form Family Management | Scan/Import**.

The **Scan/Import Options** window is displayed.

Scan/Import Options - Credit Application

**Scan/Import**  
Capture Options  
Advanced Scanners

**Image Size Options**

☐ If Image Size is Less Than 0 Bytes

☒ Delete  
☐ QA Review

☐ Clean Image & Retry if Less Than 0 Bytes [Configure...](#)

☐ If Image Size is Greater Than 0 Bytes

☒ Delete  
☐ QA Review  
☐ Print Image

Route Deleted Images To Directory  
[Dropdown] [Browse]

**Image Rotation Options**

Front Rotation (Odd Images) n/a Back Rotation (Even Images) n/a

**Separation**  
[Patch Codes...](#) [Barcodes...](#)

**Split Image Options**  
[Configure...](#)

**Document Control Number Assignment (DCN)**

☐ Assign DCN if no Imprinter String (<Batch Control Number>+<Image Sequence>)

Separator [Text Field]

[Defaults](#)


[OK](#) [Cancel](#) [Help](#)

- 2 Enable the **If Image Size is Less Than** check box to specify the action to take if the image's file size is less than the number specified in the **Bytes** field. Images are either deleted or routed to QA for review, depending on which radio button is enabled.
- 3 Enable the **Clean Image & Retry if Less Than** check box to apply image cleanup techniques and see if the image now qualifies to be deleted or sent to QA for review. A number should be entered in the **Bytes** field to specify the minimum image file size to apply this parameter.

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**Access OCR for AnyDoc Form Family Management**

This feature is typically used to solve a scanning problem where bleed through on the back of a simplex image causes the image to be larger than the minimum file size specified in If Image Size is Less Than \_ Bytes. This check box is only available if the If Image Size is Less Than \_ Bytes check box is enabled.

- 4 Enable the **If Image Size is Greater Than** check box to specify the action to be taken if the image's file size is greater than the number specified in the **Bytes** field. Images are either deleted or routed to QA for review, depending on which radio button is enabled.
- 5 Enable the **Print Image** check box to automatically print images deleted or sent to QA on the workstation's default printer.
- 6 Enter a location where deleted images should be stored in the **Route Deleted Images To Directory**  
OR  
Click  to browse to the location.
- 7 In the Image Rotation Options, **Front Rotation (Odd Images)** applies an automatic 0, 90, 180, or 270 degree rotation to the front (odd-numbered) images. If the **Auto** option is selected, OCR for AnyDoc does a full-page OCR and automatically determines and performs the correct rotation on each image.
- 8 In the **Image Rotation Options, Back Rotation (Even Images)** applies an automatic 0, 90, 180, or 270 degree rotation to the back (even-numbered) images. If the **Auto** option is selected, OCR for AnyDoc does a full-page OCR and automatically determines and performs the correct rotation on each image.
- 9 Click **Patch Codes** to set up and print patch pages for the form family. See Patch Pages (page [337](#)).
- 10 Click **Barcodes** to configure patch pages for the form family.
- 11 Click the **Configure** button in the Split Image Options section to set parameters for converting scanned images into two or more individual images. See Split Image Options (page [340](#)).
- 12 Enable the **Assign DCN If No Imprinter String (<Batch Control Number> + <Image Sequence>)** check box to assign a Document Control Number (DCN) to the batch if an Imprinter string is not assigned. The assigned DCN is comprised of the Batch Control number + the Image Sequence. This is used primarily when a batch is routed to EXCHANGEit for an EDI file.
- 13 In the **Separator** field, specify the character that will be used to separate the batch control number and the image sequence if one is not already assigned by the scanner.
- 14 Click **OK**.

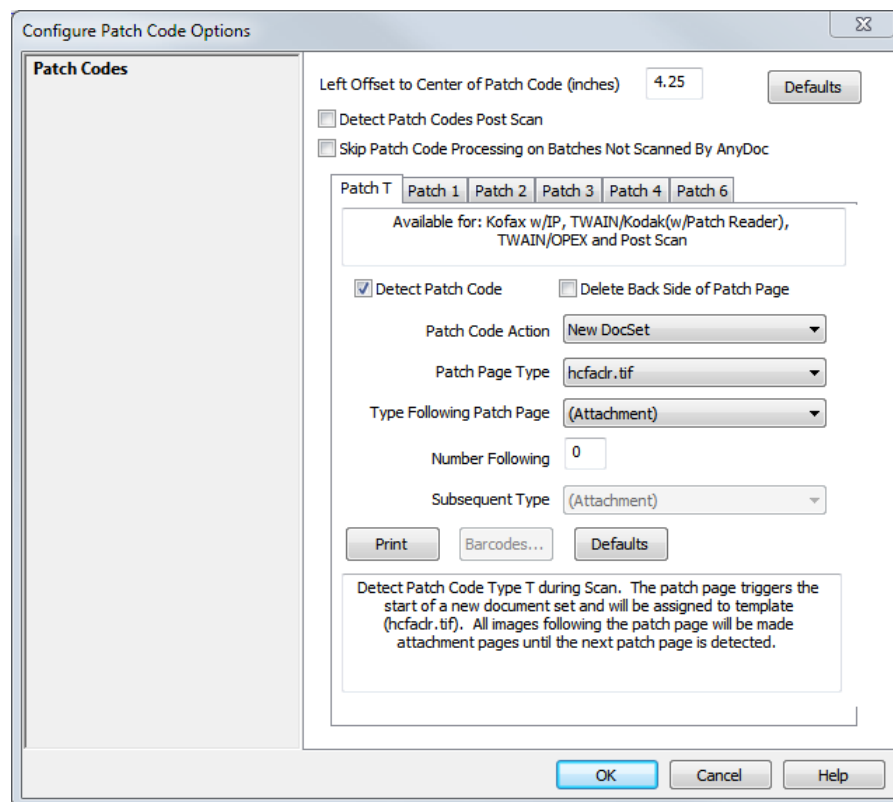
## Configure Patch Code Options

The Configure Patch Code Options window allows you to:

- Specify that patch codes will be used for the Form Family  
If you are using OCR for AnyDoc to detect the patch codes during Import, it does not matter which type you use, every type offers the same options. If you are using the scanner to detect patch codes you must choose a patch code type that is supported by the scanner interface you're using.
- Configure how patch codes will be used
- Print patch pages

### Steps

- 1 From **Scan/Import Options | Scan/Import**, click the **Patch Codes** button.  
The **Configure Patch Code Options** window is displayed.



- 2 If you are using a scanner to detect patch code(s), enter the distance from the paper's left edge to the patch code's center.
- 3 To detect patch codes during the Import phase, select the **Detect Patch Codes Post Scan** check box if you are doing the following:

---

**Access OCR for AnyDoc Form Family Management**

- Scanning with another application or
  - Using a scanner interface in OCR for AnyDoc that does not support patch code recognition.
- 4 To skip the processing of patch codes on batches that were scanned outside of OCR for AnyDoc, select the **Skip Patch Code Processing on Batches Not Scanned by AnyDoc** check box.
- 5 Click on the appropriate tab for the patch code type to be used. Valid Patch types are:

- Patch T (Transfer Patch)



- Patch I



- Patch II



- Patch III



- Patch IV

Patch IV



- Patch VI



For more information about the available options for each patch code, see [Configure Patch Code Type Options](#).

- 1 Click **OK**.

### Use Barcodes to Specify Patch Page Options

Special barcodes can be printed on patch pages to dynamically set OCR for AnyDoc patch page options. A barcode can be used instead of a static value in the Patch Page Type, Type Following Patch Page, or Subsequent Type field in the Configure Patch Code Options window. With this feature you can print different patch pages to use with the same form family according to varying circumstances.

For example, if the first page after the patch page is sometimes going to be deleted, and other times made into an Attachment page, you could:

- In the Configure Patch Code Options window, set Type Following Patch Page to Barcode Value.
- Print one patch page with the barcode to delete the following page, and print one patch page with the barcode to make the following page an Attachment.

Use whichever patch page applies to the specific batch of forms you are scanning at the time, or intermix them as necessary.

### Steps

- 1 In the **Configure Patch Code Options** window, set the **Patch Page Type**, **Type Following Patch Page**, or **Subsequent Type** field to Barcode Value. The fields you set to Barcode Value depends on the actions you need to specify dynamically with different printed patch pages.
- 2 Click **Barcodes** to set up the barcode.  
The Advanced Patch Page Settings window is displayed.
- 3 Change the **Prefix Code** if necessary. The Prefix Code tells OCR for AnyDoc whether the barcode applies to Patch Page Type, Type Following Patch Page, or Subsequent Type. OCR for AnyDoc checks the printed barcode against the value saved in this field, so if you change the value, you must print new patch pages.
- 4 Select an **Action Code** from the drop down list. Options include:
  - **(Attachment)** - Make the image an Attachment page. For example, archive the image without performing data extraction.

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**Access OCR for AnyDoc Form Family Management**

- **(Delete)** - Delete the image.
  - **(Route to Classification)** - Route the image to the Classification phase.
  - **template.tif** - Classify the image as the specified template. All the template file names in the Form Family are listed to choose from.
- 5 When clicking the Barcodes field, a tab corresponding to the field set to Barcode Value is available. Repeat steps 3 and 4 for all other patch page tabs that are available.
  - 6 Click **OK**.
  - 7 Click **Print** to print the patch page with the barcode values.
  - 8 Click **Barcodes** again.
  - 9 Leave the Prefix Code the same, select a different **Action Code** from the drop down list.
  - 10 If you have more than one field set to use barcode values, click the next tab and repeat step 9 for the next field.
  - 11 Click **OK**.
  - 12 Click **Print** to print the patch page with the barcode values. If you have more actions to define, or different combinations of actions to define, repeat steps 8 through 12 as many times as necessary.

## Configure Split Image Options

### Steps

- 1 From the **Scan/Import Options** window, click the **Scan/Import** tab.
- 2 In the **Split Image Options** section, click **Configure**.

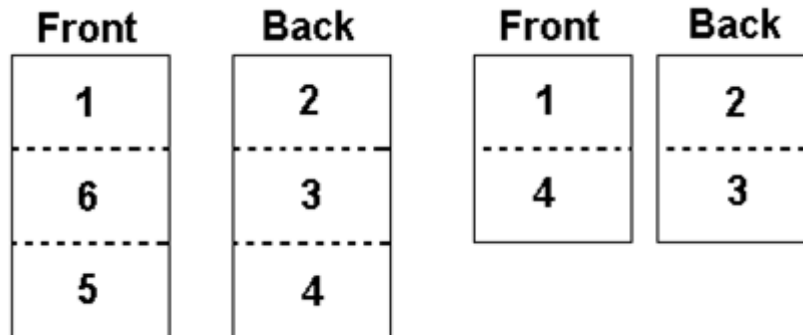
## Access OCR for AnyDoc Form Family Management

The **Configure Split Image Options** window is displayed.

- 3 In the **Rotation of Split Images** section, Select the **Front** and **Back** rotation to make the images on the front and back upright.
- 4 In the **After Rotation, Perform Splits** section, specify whether splits should be performed **Horizontally** or **Vertically** after the rotation.
- 5 In the **Split Image Options** section, specify how the image should be split. Options include:
  - **No Split**  
The image is not split.
  - **Equal Sized Images**  
Enter a number to split the image into a number of equal sized pages. This number is per side for duplex images.
  - **Split Every** \_\_\_\_  
Enter a number of inches to split the image by inches.

**Access OCR for AnyDoc Form Family Management**

- 6 Select the **Resequence Split Images** check box and enter the order for the split images in the fields provided. Standard folding schemes are as follows:



- 7 To split an image if the width of an image exceeds the specified number of inches, enter a number in the **Only if Width Exceeds \_\_\_\_ (1/100 inches) (After Rotation of Original Image)** field.
- 8 To split an image if the height of an image exceeds the specified number of inches, enter a number in the **Only if Height Exceeds \_\_\_\_ (1/100 inches) (After Rotation of Original Image)** field.
- 9 In the **Splitting Images in Batches Not Scanned By AnyDoc** section, specify how images that were scanned or imported not using an AnyDoc product will be split. Options include:
- **None (Split Process will be Skipped)**
  - **Images are Simplex**
  - **Images are Duplex**
- 10 To not split the first image in the batch select the **Skip First Image In Batch (Don't Attempt Split)** check box.
- 11 This can be used, for example, if the first image in each batch is a cover sheet of some kind.

## Capture Options

### Steps



**Access OCR for AnyDoc Form Family Management**

- 1 Select **Settings | OCR for AnyDoc® Form Family Management | Scan/Import**. The Scan/Import Options window is displayed.

Scan/Import Options - Credit Application

**Scan/Import**  
Capture Options  
Advanced Scanners

**Image Size Options**

☐ If Image Size is Less Than  Bytes

☒ Delete  
☐ QA Review

☐ Clean Image & Retry if Less Than  Bytes

☐ If Image Size is Greater Than  Bytes

☒ Delete  
☐ QA Review  
☐ Print Image

Route Deleted Images To Directory

**Image Rotation Options**

Front Rotation (Odd Images)  Back Rotation (Even Images)

**Separation**

**Split Image Options**

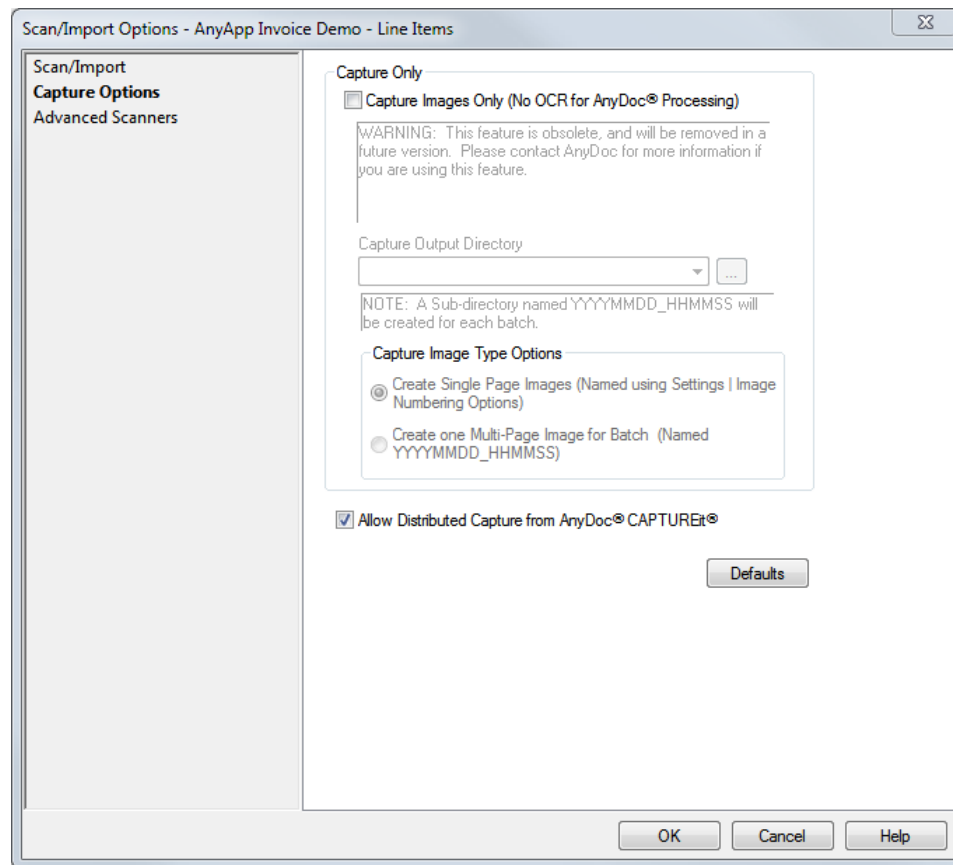
**Document Control Number Assignment (DCN)**


☐ Assign DCN if no Imprinter String (<Batch Control Number>+<Image Sequence>)

Separator

**Access OCR for AnyDoc Form Family Management**

- Click the **Capture Options** tab.



- Select the **Capture Images Only (No OCR for AnyDoc® Processing)** check box to capture and output images without extracting data or creating any ASCII output.
- Enter the location to store the captured images in the **Capture Output Directory** field  
OR  
Click  to browse to the location.
- Select a radio button in the **Capture Image Type Options** section to specify how image files are output and named. Options include:
  - Create Single Page Images (Named using Settings | Image Numbering Options):** Each page is saved as a separate image. The default image numbers as setup in the Image Number Settings window are used.
  - Create one Multipage Image for Batch (Named YYYYMMDD\_HHMMSS):** One multi-page .TIF file is created for each batch. The file name is the date and time.
- Select the **Allow Distributed Capture from AnyDoc® CAPTUREit®** check box to allow CAPTUREit users to scan images into form families.

- 7 Click **OK**.

## Import Options

The Import Settings window contains settings that affect importing images, including:

- The location of images to import
- What to do with non-image files
- Whether to convert color images

To access the Import Settings window, select **Settings | OCR for AnyDoc® Form Family Management | Import**.

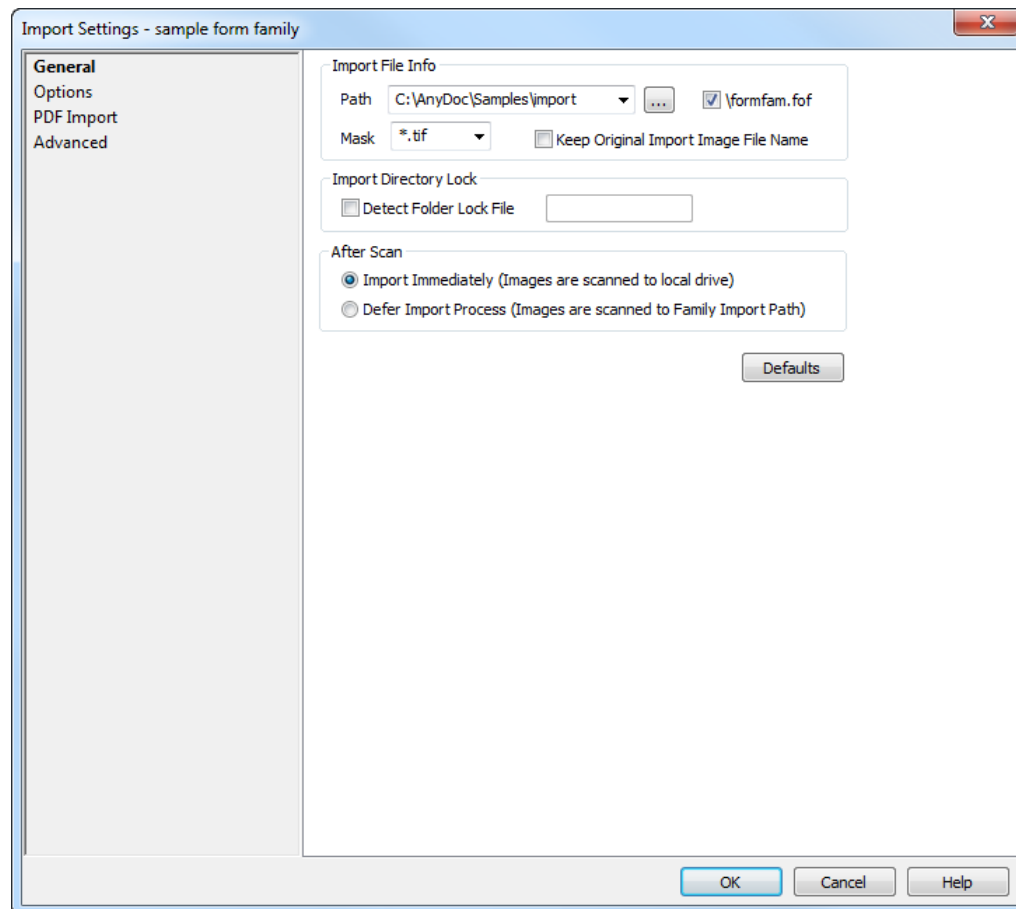
## Set General Import Settings


### Steps

- 1 Select **Settings | OCR for AnyDoc® Form Family Management**.  
The **Form Family Management** window is displayed.
- 2 Click **Import**.  
The **Import Settings** window is displayed.

**Access OCR for AnyDoc Form Family Management**

- 3 Click the **General** tab.



- 4 Enter the location of the files to be imported in the **Path** field  
OR  
Click  to browse to the location.
- 5 Enable the **\family.fof** check box to add the form family name to the location specified in the Path field.
- 6 Enter a file extension of the images to import in the **Mask** field. The default mask \*.tif imports all .TIF files from the specified directory.
- 7 Enable the **Keep Original Import Image File Name** check box to have OCR for AnyDoc restore image files to their original names at the Commit phase.
- 8 Enable the **Detect Folder Lock File** check box and enter a file name in the field to the right to prevent OCR for AnyDoc from importing images when a locked file with the specified name exists in the Import directory. This is used if you are writing files to the Import directory from a source outside of OCR for AnyDoc (e.g., using a third party scanning application) to prevent files from being imported while they are still being written to the directory.

**Access OCR for AnyDoc Form Family Management**

- 9 Enable a radio button in the **After Scan** section to specify whether images are imported automatically as they are scanned or whether import is deferred until the Import button is clicked.

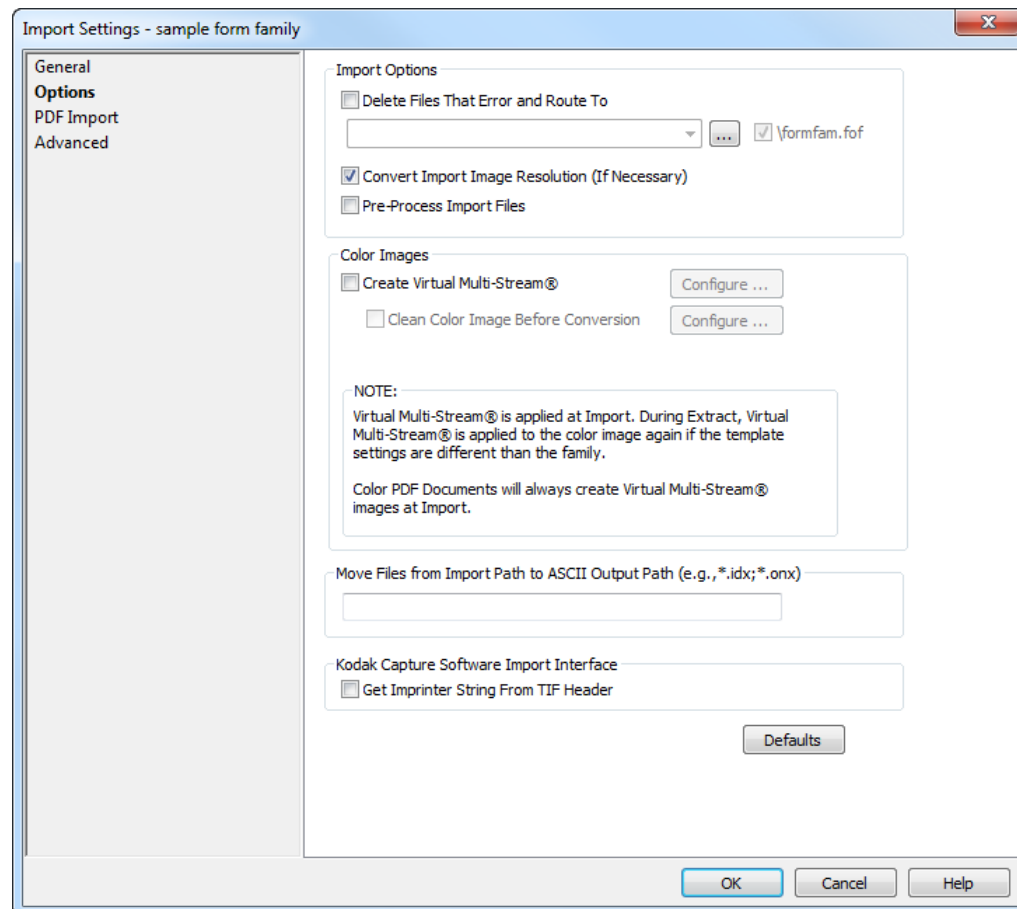
If you enable **Import Immediately**, images are scanned to the local hard drive and simultaneously imported. If you enable **Defer Import Process**, images are scanned to the Import directory specified above and are not imported until you initiate the Import phase.

- 10 Click **OK**.

## Configure Import Options Settings

### Steps

- 1 Select **Settings | OCR for AnyDoc® Form Family Management**.  
The **Form Family Management** window is displayed.
- 2 Click **Import**.  
The **Import Settings** window is displayed.
- 3 Click the **Options** tab.



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**Access OCR for AnyDoc Form Family Management**

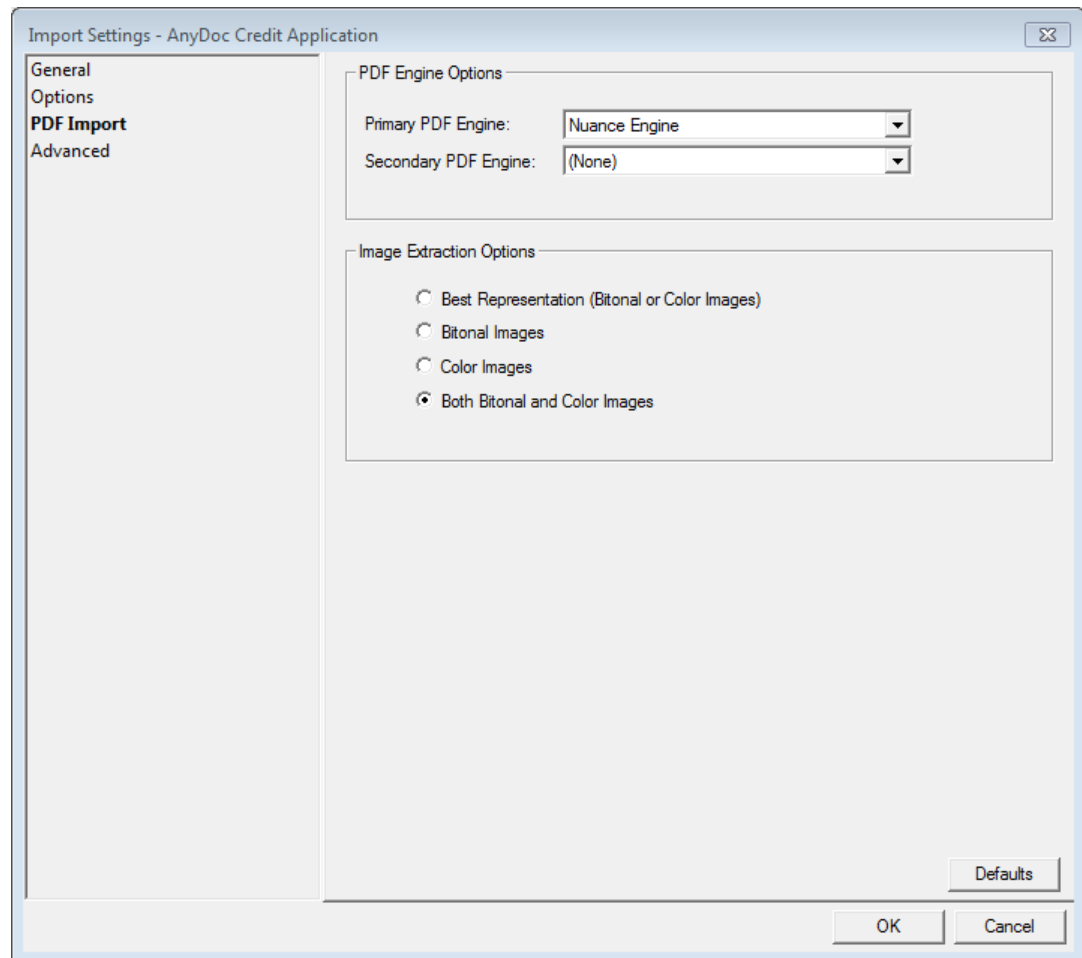
- 4 Enable the **Delete Files That Error and Route To** check box to delete any files in the Import directory with a file extension that match the specified file mask type and are determined not to be actual image files. The files are deleted from the Import directory and moved to the specified location. A .txt file containing the specific error message is also created in the specified directory. Click the browse button to browse for a directory.
- 5 Enable the **\family.fof** check box to create a subdirectory named after the form family name in the specified directory.
- 6 If the imported images are a different resolution from the template, enable the **Convert Import Image Resolution (If Necessary)** check box. OCR for AnyDoc does not add or remove pixels from the image. OCR for AnyDoc does change the image header information.
- 7 Enable the **Pre-Process Import Files** check box to rewrite image files using software which detects and handles most image format problems. The original invalid file is replaced with a properly formatted image file that can be successfully processed by all phases in OCR for AnyDoc.
- 8 Enable the **Create Virtual Multi-stream®** check box if you may have color data images. This converts color data images to black and white TIFFs so character recognition can be performed. If there is a color .JPG version of any of the templates in the form family, click **Configure** to adjust the settings for the color to black and white conversion.
- 9 Enable the **Clean Color Images Before Conversion** check box to apply Image Cleanup parameters prior to converting the image to bitonal. Click **Configure** to specify the Image Cleanup parameters to apply to the image.
- 10 The **Move Files from Import Path to ASCII Output Path (e.g.,\*.idx; \*.onx)** field moves any files with the specified mask from the Import directory to the ASCII output directory at Commit. To specify multiple file types, separate each extension with a semi-colon(;). This option can be used if you have other non-image files that should be kept with the ASCII output.
- 11 Enter a file extension (e.g., .TIF) in the **Move** field to move any files with the specified extension from the Import directory to the ASCII output directory at Commit.
- 12 In the Kodak Capture Software Import Interface section, enable the **Get Imprinter String From TIF Header** check box to have OCR for AnyDoc attempt to read the imprinter.
- 13 Click **OK**.

## PDF Import

Settings in the **PDF Import** tab allow you to specify a primary and secondary engine for importing PDF files. If the primary engine fails the PDF image extraction process and a secondary engine is configured, then another attempt is made to process the PDF with the secondary engine.

### Steps

- 1 Select **Settings | OCR for AnyDoc® Form Family Management**.  
The **Form Family Management** window is displayed.
- 2 Click **Import**.  
The **Import Settings** window is displayed.
- 3 Click the **PDF Import** tab.



**Access OCR for AnyDoc Form Family Management**

Option	Description
Primary PDF Engine	Specify the primary engine for importing PDF files: <ul style="list-style-type: none"><li>• <b>Aspose Engine</b></li><li>• <b>Nuance Engine</b> (default)</li></ul>
Secondary PDF Engine	Specify the secondary engine for importing PDF files, or specify <b>(None)</b> .
Image Extraction Options	Select how the images are to be extracted: <ul style="list-style-type: none"><li>• Best Representation (Bitonal or Color Images)</li><li>• Bitonal Images</li><li>• Color Images</li><li>• Both Bitonal and Color Images</li></ul>

## Set Advanced Import Settings

### Steps

- 1 Select **Settings | OCR for AnyDoc® Form Family Management**.  
The **Form Family Management** window is displayed.
- 2 Click **Import**.  
The **Import Settings** window is displayed.



**Access OCR for AnyDoc Form Family Management**

- 3 Click the **Advanced** tab.

The screenshot shows the 'Import Settings - sample form family' dialog box with the 'Advanced' tab selected. The left sidebar lists 'General', 'Options', 'PDF Import', and 'Advanced'. The main area contains the following settings:

- Import Subdirectory Options:**
  - ☐ Defer Import Until 0 Minutes Old
  - ☒ Remove Empty After 0 Hours
  - ☐ Utilize Subdirectory Name as Batch Control Number
- ☐ Use Import File Name to Separate
  - ☒ Batches
  - ☐ Document Sets
- Create New Batch When:**
  - ☒ Transmission Changes
  - ☐ Page Counter Resets
- Trigger Mask:**
  - Start Position: -1
  - Stop Position: -1
- NOTE: Values are Zero Based
- Defaults button

At the bottom are OK, Cancel, and Help buttons.

- 4 Select the **Defer Import Until** check box and enter a number in the **Minutes Old** field to prevent OCR for AnyDoc from importing images for the specified number of minutes.
- 5 Select the **Remove Empty After** check box and enter a number in the **Hours** field to delete empty subdirectories under the Import directory after the specified number of hours has elapsed.
- 6 Select the **Utilize Subdirectory Name as Batch Control Number** check box to name the subdirectory as the user defined Batch Control number when OCR for AnyDoc imports a batch of images from a subdirectory.
- 7 Select the **Use Import File Name as Batch Separator** check box to create new batches in OCR for AnyDoc based on the imported images' file names. This is used with faxes.
- 8 Select a radio button in the **Create New Batch When** field to indicate what kind of change to look for in the file names to trigger a new batch. Options include:

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**Access OCR for AnyDoc Form Family Management**

- **Transmission Changes:** A new batch is formed when the characters in positions in an image file name being evaluated by the Trigger Mask are not equal to the evaluated positions in the preceding image.
  - **Page Counter Resets:** A new batch is formed when the number in an image file name in the positions matching the Trigger Mask is lower than the number in the same positions in the preceding image.
- 9 Enter a number between 0 and 255 in **Trigger Mask** positions to indicate which character positions in the image file name to evaluate. The Trigger Mask positions are analyzed from the specified start position to the specified stop position. A position of 0 represents the first character in the file name.
- 10 Click **OK**.

## Quality Assurance

The Quality Assurance window provides settings that determine whether or not the QA processing phase is used for a form family. If it is activated, the Quality Assurance phase takes place immediately after Import, before Classification and Extraction. The Quality Assurance operator has the ability to visually inspect and manipulate the images in a batch. Quality Assurance operators can:

- Delete, prioritize or suspend a batch
- Rotate an image
- Apply image cleanup parameters
- Print an image
- Rescan an image (if there is a scanner connected to the workstation)
- Flag an image to be rescanned
- Make an image into an attachment
- Create or rearrange document sets

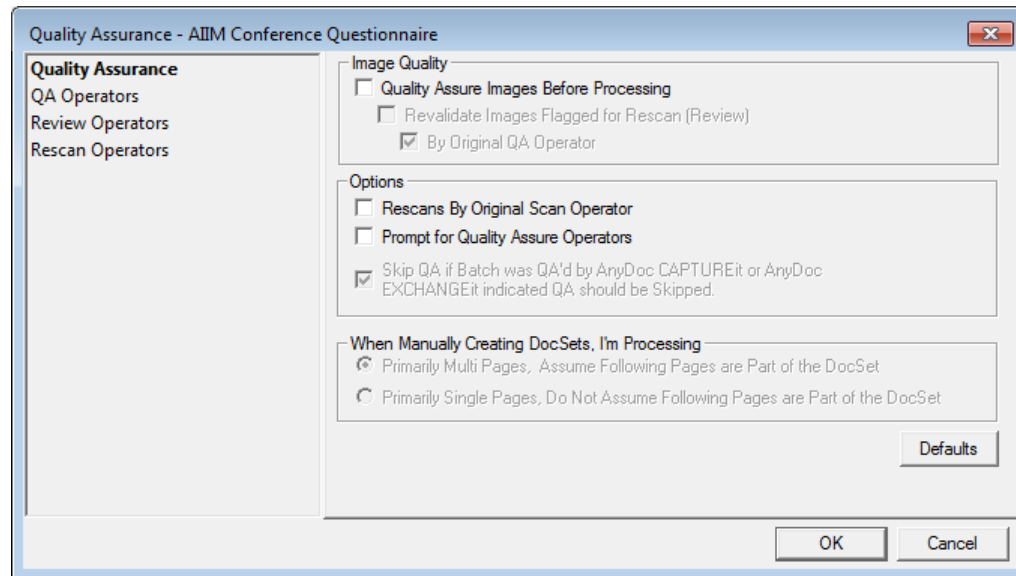
To access Quality Assurance, select **Settings | OCR for AnyDoc® Form Family Management | Quality Assure**.

## Quality Assurance Options

### Steps

## Access OCR for AnyDoc Form Family Management

- 1 Select **Settings | OCR for AnyDoc Form Family Management | Quality Assure**. The **Quality Assurance** window is displayed.



- 2 Enable the **Quality Assure Images Before Processing** check box to pass batches through QA prior to Classification and Extraction.
- 3 Enable the **Revalidate Images Flagged for Rescan (Review)** check box to have a QA operator review images that have been rescanned in the Review phase.
- 4 Enable the **By Original QA Operator** check box to have the original QA operator who flagged an image for re-scan assigned that image for review after it is scanned again.
- 5 Enable the **Rescans By Original Scan Operator** check box to have images flagged for re-scan go back to the original scan station.
- 6 Enable the **Prompt for Quality Assure Operators** check box to have the Scan/Import operator prompted to assign a user to QA the batch.
- 7 Enable the **Skip QA if Batch was QA'd by AnyDoc CAPTUREit or AnyDoc EXCHANGEit indicated QA should be Skipped** check box, if needed.
- 8 Enable a radio button in the **When Manually Creating DocSet, I'm Processing** to specify whether to assume subsequent pages are part of the DocSet. Options include:
  - **Primarily Multi Pages, Assume Following Pages are Part of the DocSet:** When the QA operator manually marks an image as the start of a document set, all subsequent pages in the batch are automatically made members the docset up to the next document set start.
  - **Primarily Single Pages, Do Not Assume Following Page are Part of the DocSet:** When the QA operator manually marks an image as the start of a

**Access OCR for AnyDoc Form Family Management**

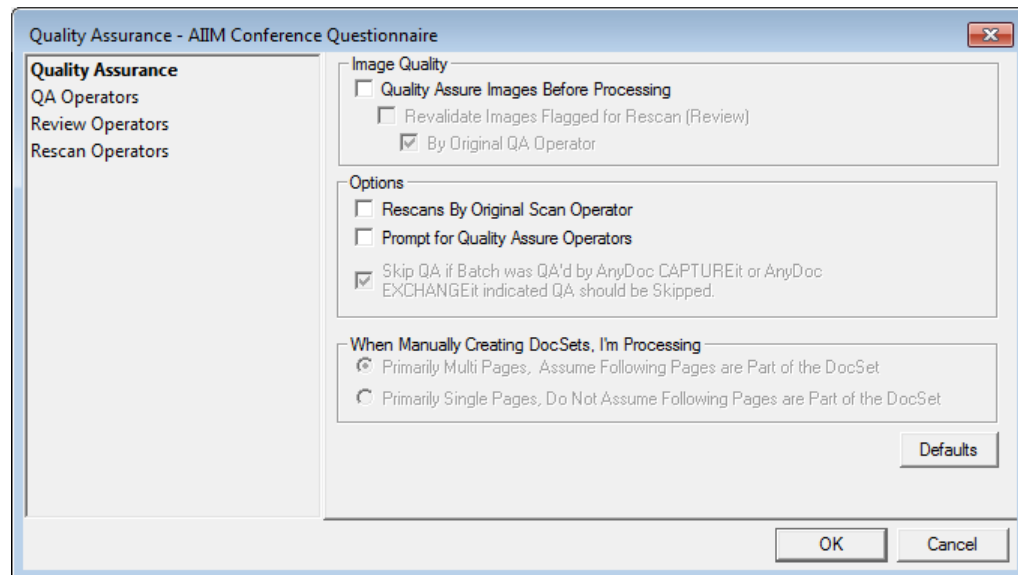
document set, none of the subsequent pages are automatically made members of the docset.

- 9 Click **OK**.

## Assign QA, Review and Rescan Operators

### Steps

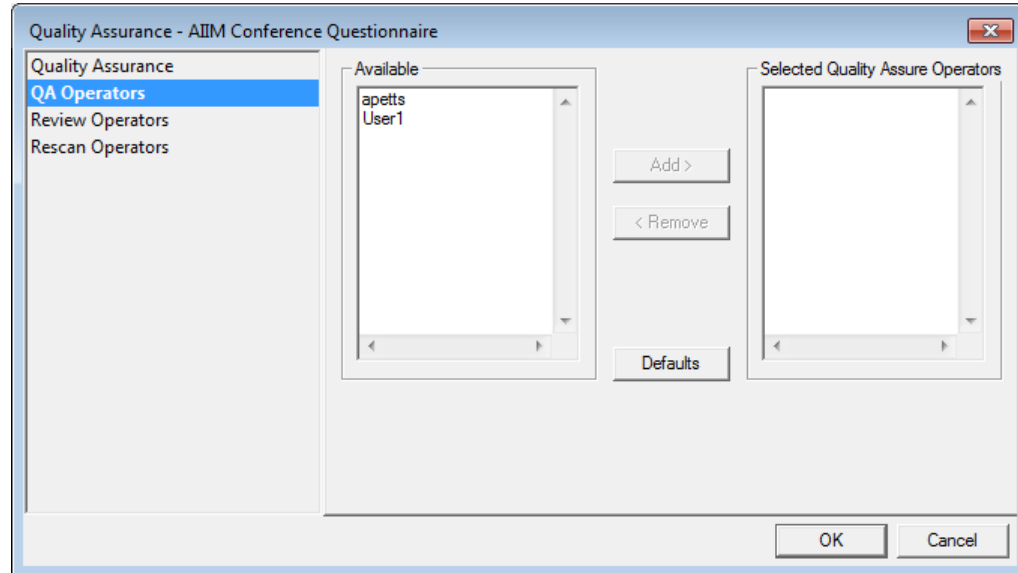
- 1 Select **Settings | OCR for AnyDoc Form Family Management | Quality Assure**. The Quality Assurance window is displayed.



- 2 Click one of the following tabs: **QA Operators** or **Review Operators** or **Rescan Operators**.

**Access OCR for AnyDoc Form Family Management**

Since the same process is followed when setting up the QA operators, review operators, and rescan operators the procedure is detailed here for all three tabs.



- 3 To add a user to the QA operators, select a name from the **Available** field and click **Add**. The user is added to the Selected Quality Assure Operators field.
- 4 To remove a user from the Selected Quality Assure Operators field, select a current operator and click **Remove**. The operator is removed and the name is displayed in the Available field.
- 5 Click **OK**.

## Classification Options

The options in the Classification Settings window are used to configure form classification options for the selected form family. Options include both functions that control the form classification process and handle unidentified forms.

To access the Classification Settings window, select **Settings | OCR for AnyDoc Form Family Management | Classification**.

## Configure General Classification Options

### Steps

**Access OCR for AnyDoc Form Family Management**

- 1 Select **Settings | OCR for AnyDoc Form Family Management | Classification**. The Classification Settings window is displayed.

- 2 Enable a radio button in the **Classification Queuing Method** section to specify how forms are identified against the template. Options include:
  - **None:** Classification is not performed. Use this option when there is only one template in the form family and there are no attachments or if one of the Classification Bypass options are selected.
  - **Mixed:** Auto ID points appear on different parts of the form. Enable this option when there is more than one master form template within a form family and the images are scanned or imported in a random order or are likely to be in an order where there are multiple pages of a single form type together in a batch. After identifying one form, the system starts to classify the next form by starting with the master form template for the last identified form in the batch.
  - **Sequential:** Enable this option if pages have been scanned in order (e.g., 1, 2, 3, 4). After image classification, the system starts with the next master form

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Access OCR for AnyDoc Form Family Management

template in the selected list. The Sequential method is best used when scanning documents with multiple pages (e.g., 10 page questionnaire).

- **Fixed:** Use this option if all form family master form templates have an Auto ID point in the same relative location. This method is typically faster than the mixed or sequential method.
  - **AccuID:** AccuID works at the form family level, as opposed to, Auto ID which works at the master form template level. A classification table is built based on the unique topology of each form family master form template. The classification table is compared to incoming data images. AccuID sorts and routes data images to the correct master form template for processing.
  - **QA Manual:** The form family skips the Classification phase. All unclassified images are sent directly to the Review phase so an operator can manually assign it a template ID.
- 3 To have OCR for AnyDoc place data images in the same order as the templates in the form family, enable the **Re-Order Pages Out Of Sequence** check box. Any given image is only moved one place forward or one place back.  
If **Re-Order Pages Out Of Sequence** is enabled, no images in a batch are available for Extraction until the entire batch is identified.
  - 4 Enable the **Automatically Flip 180°** check box when the system fails to Auto ID an image to rotate the data image 180° and attempt Auto ID again. This is good for forms, which have been scanned upside down.
  - 5 To crop the image prior to rotation, enable the **Crop Before Rotate** check box. This check box is only available if the **Automatically Flip 180°** check box is enabled.
  - 6 Enable the **Assign every** check box and enter a number in the **Images to Default Master** field to automatically match the images in the designated positions in the batch to the default master form specified in the Unidentified tab.
  - 7 Enable the **All Images in a Document Set are The Same (Document Sets must be established at Scan/Import Time)** check box, if needed. The first image in a docset is identified using Auto ID or AccuID and the remaining image in the docset are automatically matched to the same template as the first image without being evaluated.
  - 8 Enable the **Make an Attachment if Height is Less Than \_\_\_\_\_ Inches** check box to classify an image as an attachment if the image is less than the specified number of inches.
  - 9 Enable the **Assume Image Order Matches Master List** check box to have the system assume that the data image order in a batch is the same as the form family template order.
  - 10 Enable the **Make every** check box and enter a number in the **Image an Attachment** field to have the system automatically turn images in the designated position in the batch into attachment pages without matching them to a template.

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**Access OCR for AnyDoc Form Family Management**

- 11 Enable the **Kodak ImageLink Classification** check box to use Kodak ImageLink Classification instead of the OCR for AnyDoc Classification phase. Images are assigned Levels by the Kodak scanner using patch pages, and OCR for AnyDoc is configured to interpret the levels assigned by the scanner. Click the **Configure** button to define how the Image Levels assigned by the scanner are used in OCR for AnyDoc. See Configure Kodak Document Image Level Options (page [358](#)).
- 12 To use the image order to classify the image, enable **Use Sequence to Classify Images (First and Following)** check box.

This option is primarily used with multipage .TIFs or patch pages, and is only useful in form families that have two templates or less. The **Use Sequence to Classify Images (First and Following)** feature allows you to specify that images within a document set, multi-page .TIF, or batch should be automatically identified as matching two different templates or one template and attachments based on where the image falls in the sequence.
- 13 Enter a number in the **First Image Count** field to specify the number of images that should be identified as the type selected in the Classify Every First Image as drop down list.
- 14 Select an option from the **Classify Every First Image as** drop down list to specify what the first image's type.
- 15 Select an option from the **Classify All Following Images as** drop down list.
- 16 Enable the **Classify Color Images as** check box and select an option from the drop down list to automatically identify all color images as either an attachment page or to a predetermined template.
- 17 Click **OK**.

## Configure Kodak Document Image Level Options

The Configure Kodak Document Image Level Options window allows you to:

- Specify that Kodak Image Levels to use for the form family
- Configure how Image Levels are used in OCR for AnyDoc

To access the Configure Kodak Image Levels Options window, click the Kodak ImageLink Identification **Configure** button in **Classification Settings | General Options**.



Please refer to the documentation that accompanied your Kodak scanner for instructions on configuring the scanner itself for Image Levels.



**Access OCR for AnyDoc Form Family Management**

Each tab in the **Configure Kodak Image Level Options** window corresponds to a specific Level. Every Level has the same options available in OCR for AnyDoc. Click the tab for the appropriate Level, then click **Detect Level** to activate the options.

**Configure Kodak Document Image Level Options**

Image Levels

Level 0 | Level 1 | Level 2 | Level 3

☒ Detect Level ☐ Delete Back Side of Page

Level Action: New DocSet

Level Page Type: (Delete)

Type Following Level Page: tiger.tif

Number Following: 1

Subsequent Type: (Attachment)

Barcodes... Defaults

Detect Image Level 0 during Scan. The image level triggers the start of a new document set and will be deleted. The next 1 images following the image level will be assigned to template (tiger.tif). The remaining images will be made attachment pages until the next image level is detected.

OK Cancel Help

**Delete Back Side of Page**

If selected, deletes the back of the Level page. This is useful if you are scanning in duplex, but the back of the Level page is blank or unwanted.

**Level Action**

This determines what happens when the level is detected.

<b>New DocSet</b>	When this level is detected, a new document set is created.
<b>New Batch</b>	When this level is detected, a new batch is created.
<b>New Batch/DocSet</b>	When this level is detected, both a new batch and a new document set is created.

**Access OCR for AnyDoc Form Family Management**

<b>Single Page DocSets</b>	When this level is detected, the Level page and every subsequent page are single page document sets (until another level is detected).
<b>Two Page DocSets</b>	When this level is detected, the Level page and every subsequent page are two page document sets (until another level is detected).

**Level Page Type**

Determines what is done with the Level page image itself.

<b>(Route to Classification)</b>	Route the image with the level to the Classification phase. This is used if the level is on a data image rather than on a page by itself, but the specific template needs to be identified.
<b>(Delete)</b>	Delete the image with the level. This is used if the level is on a separate Level page rather than on a data image.
<b>(Attachment)</b>	Make the image with the level an attachment. For example, archive the image without performing data extraction.
<b>template.tif</b>	Identify the Level page as the specified template. All the template file names in the form family are listed to choose from.

**Type Following Level Page**

Determines what is done with the next page after the Level page.

<b>(Route to Classification)</b>	Route the image to the Classification phase.
<b>(Delete)</b>	Delete the image.
<b>(Attachment)</b>	Make the image an attachment. For example, archive the image without performing data extraction.
<b>template.tif</b>	Identify the image as the specified template. All the template file names in the form family are listed to choose from.

**Number Following**

This is used if there are a specific number of the page type specified above following the Level page, then a different page type. If all images following the Level page should be handled the same until the next Level page is detected, leave this set to zero. Otherwise, enter the number of pages, then specify a Subsequent Type.

**Subsequent Type**

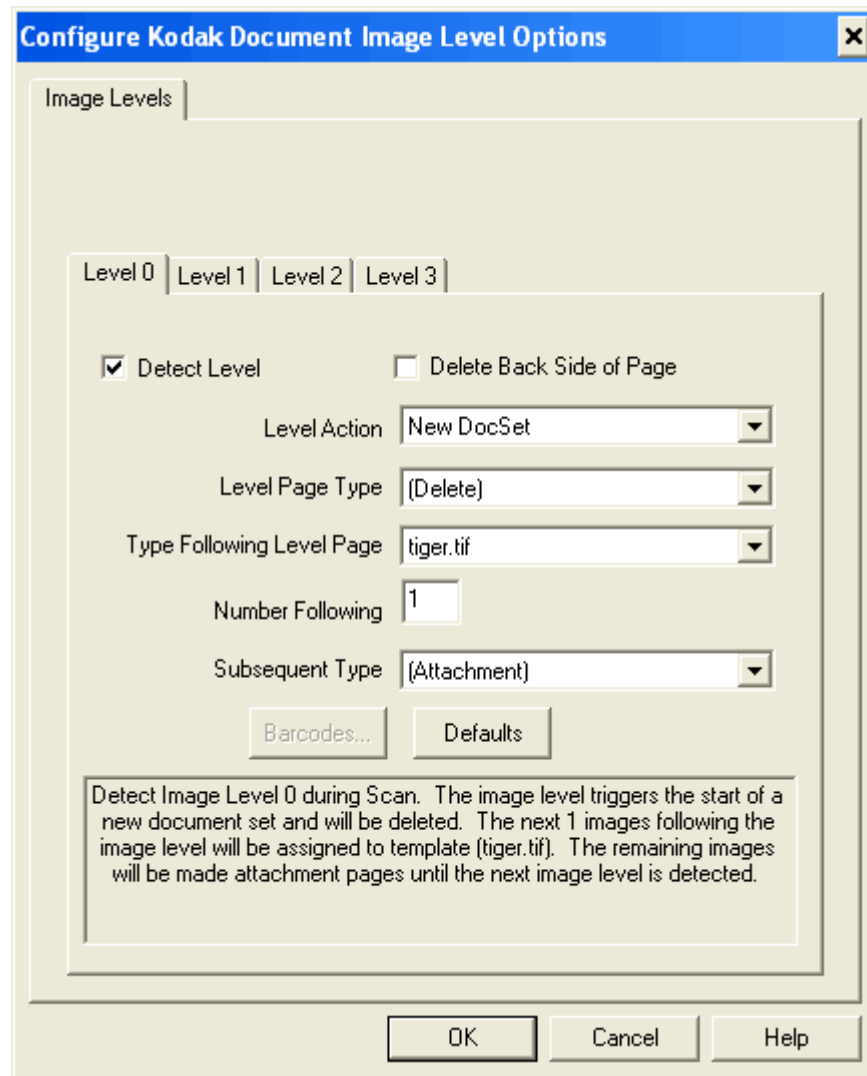
Determines what is done with any pages after the specified number above. This field has all the same options as Type Following Level Page. See Level Example (page [361](#)).

**Defaults**

Click to return the options in this tab to the default settings.

## Level Example

This example uses an image Level on a separate page, followed by one form, then followed by one or more attachment pages. Each new Level page defines a new document set. The Level page is used to split document sets and perform all classification. The batch imports and is ready for Extraction; no classification is necessary.



## Set Unidentified Images Options

### Steps

- 1 Select **Settings | OCR for AnyDoc Form Family Management | Classification**. The **Classification Settings** window is displayed.

**Access OCR for AnyDoc Form Family Management**

- 2 Click the **Unclassified Images** tab.



This tab is only available when the **Classification Settings | General Options** tab | **General Queuing Method** is set to **Mixed**, **Sequential**, **Fixed**, or **AccuID**.

Classification Settings - AIIM Conference Questionnaire

General Options  
**Unclassified Images**  
AccuID Configuration

Unclassified Images

☒ Exception Handler (Manual Classification)  
☐ Create Attachment Page  
☐ Default To Master Form (none)  
☐ Delete  
☐ Review in Quality Assure Phase

Defaults

OK Cancel

- 3 To send unidentified images to the ID Exception handler, enable the **Exception Handler (Manual Classification)** radio button.
- 4 To make unidentified images attachment pages, enable the **Create Attachment Page** radio button. Attachments are images that are carried through the system without being processed. The image is archived with the rest of the batch when the batch is committed.
- 5 To process the unidentified images against the selected template, enable the **Default to Master Form** radio button and select a template from the drop down list to the right.
- 6 To delete unidentified images, enable the **Delete** radio button.

## Access OCR for AnyDoc Form Family Management

- 7 Enable the **Review in Quality Assure Phase** radio button to send unidentified images to the Review phase for an operator to reconcile the image.
- 8 Click **OK**.

## Configure AccuID



The **AccuID Configuration** tab only is only available when the **Classification Settings | General Options** tab | **General Queuing Method** is set to **AccuID**.

### Steps

- 1 Select **Settings | OCR for AnyDoc Form Family Management | Classification**. The **Classification Settings** window is displayed.

- 2 In the **Classification Queuing Method** section, ensure **AccuID** is selected.

**Access OCR for AnyDoc Form Family Management**

- 3 Click the **AccuID Configuration** tab.

The screenshot shows the 'Classification Settings - AIIM Conference Questionnaire' dialog box with the 'AccuID Configuration' tab selected. The dialog has a sidebar on the left with three tabs: 'General Options', 'Unclassified Images', and 'AccuID Configuration'. The main area contains several sections: 'Match Process' with a 'Match Confidence%' slider set to 85%; 'Only 1 Above Match Confidence%' with radio buttons for 'Accept' (selected) and 'Validate Template'; 'More Than 1 Above Match Confidence% or Hint Confidence %' with a 'Create Template Hint List' checkbox and a 'Hint Confidence %' slider set to 65%; 'AccuID Process' with a checkbox for 'Expect New Forms (i.e., Attachments)' and an 'ID Effort%' slider set to 100% (labeled 'Best Quality'); and 'AccuID Table Properties' with checkboxes for 'Include Debug Images' and 'Exclude Master Images', a 'Rebuild Table' button, and a 'Defaults' button. At the bottom are 'OK' and 'Cancel' buttons.

- 4 Select the percentage from the **Match Confidence %** range that AccuID must meet or exceed to positively match an image to a template.
- 5 Select a radio button in the **Only 1 Above Match Confidence %** section to specify how AccuID behaves if the image being identified meets the **Match Confidence %** value for one template only. Options include:
- **Accept:** Accept the identified form as a positive match.
  - **Validate Template:** Validate the image against the defined Auto ID points on the matched template.
- 6 Select the **Create Template Hint List** check box to create a list of all templates above the Hint Confidence %. This is useful when more than one template meets the Match Confidence % or no templates meet the Match Confidence % for an image.
- 7 Select a percentage from the **Hint Confidence %** range. The Hint Confidence % range works with the Create Template Hint List check box so that any images

AccuID cannot identify with the specified Match Confidence % are compared against the Hint Confidence %. Auto ID is performed on these images against the templates in the hint list.

- 8 If you are processing images that are not included in the form family template list, select the **Expect New Forms (i.e., Attachments)** check box.
- 9 Select a percentage from the **ID Effort%** range to determine the effort the AccuID engine applies to image classification. The range is 0 to 100, with 0 representing the best speed and 100 representing the best quality.
- 10 Select the **Include Debug Images** check box if the debug images are slightly different fingerprints from the master form template.
- 11 Select the **Exclude Master Images** check box if the master form templates are significantly different from the data images being processed.
- 12 Click the **Rebuild Table** button to force a rebuild of the AccuID table.



The **Include Debug Images** check box and the **Exclude Master Images** check box should not be selected at the same time. If you exclude the master images from the AccuID table without including the debug images, nothing is included in the AccuID table, and AccuID does not work as intended.

- 13 Click **OK**.

## Attachment Settings

Through the **Attachment Page Settings** window you can define the following:

- Whether attachment pages display during Verification
- How attachment pages are archived
- Which document control options to use for attachment pages

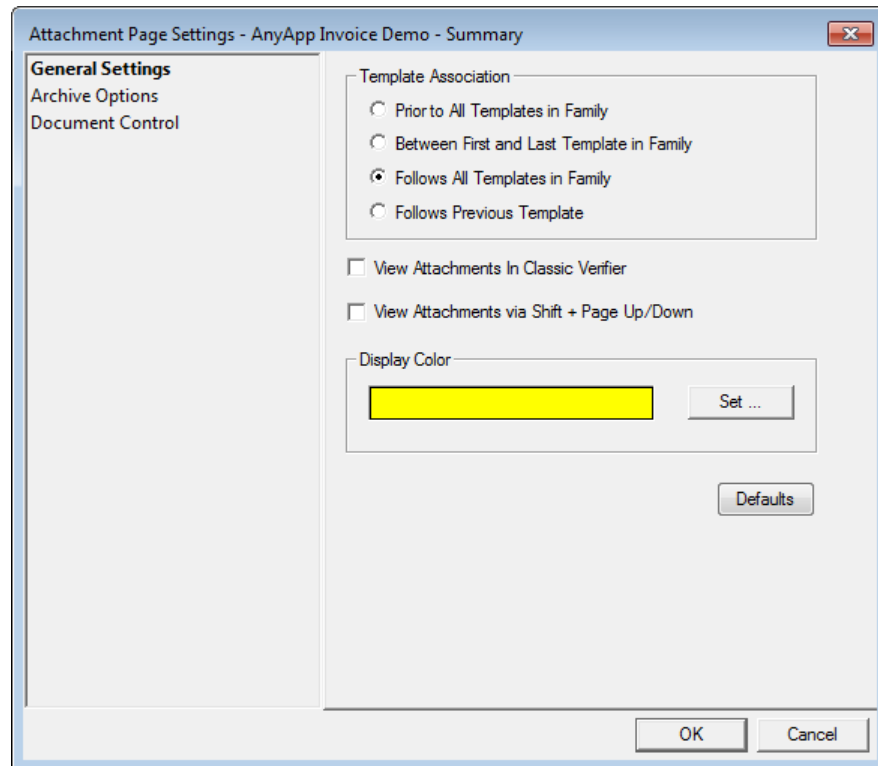
To access the Attachment Page Settings window, select **Settings | OCR for AnyDoc Form Family Management | Attachments**.

## General Settings

### Steps

**Access OCR for AnyDoc Form Family Management**

- 1 Select **Settings | OCR for AnyDoc Form Family Management | Attachments**. The **Attachment Page Settings** window is displayed.



- 2 Enable a radio button in the **Template Association** section to indicate where batch attachment pages are most likely to occur. Options include:
  - **Prior to All Templates in Family:** Attachment pages are scanned in before data images.
  - **Between First and Last Templates in Family:** Attachment pages are interspersed with data images.
  - **Follows All Templates in Family:** Attachment pages are scanned in after the data images.
  - **Follows Previous Template:** Attachment pages are scanned in after an associated data image.
- 3 To allow the Verification operator the ability to view attachment pages, enable the **View Attachment In The Verifier** check box.
- 4 To allow the Verification operator the ability to use keyboard shortcuts to display attachments, enable the **View Attachments via Shift + Page Up/Down** check box.



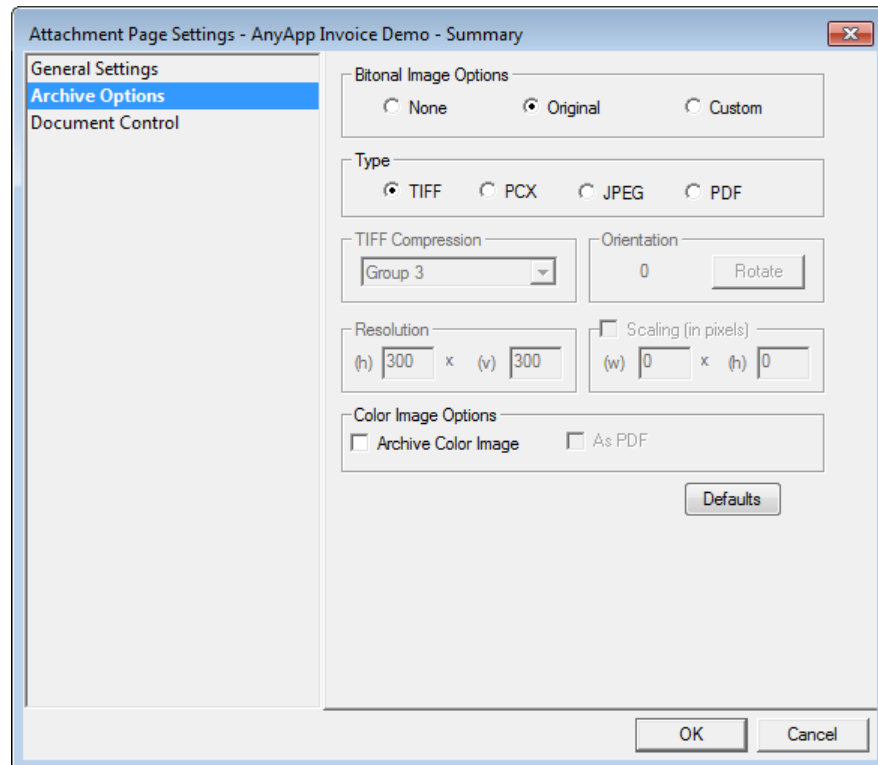
**Access OCR for AnyDoc Form Family Management**

- 5 Click the **Set** button and select a color to specify the page color of attachment pages. This applies to Edit Line Verification only and not Key From Image (KFI) verification. The default color is yellow.
- 6 Click **OK**.

## Set Archive Options

### Steps

- 1 Select **Settings | OCR for AnyDoc Form Family Management | Attachments**. The Attachment Page Settings window is displayed.
- 2 Click the **Archive Options** tab.



- 3 Select a radio button in the **Bitonal Image Options** section to specify how images are archived. Options include:
  - **None:** Attachment pages are not archived with the rest of the images. If this option is selected and there are attachment pages within document sets, blank pages are created for the attachment pages in a multi-page .TIF.
  - **Original:** Attachment pages are archived as they are scanned into the system.
  - **Custom:** Attachment pages are archived based on custom settings (TIFF Compression, Orientation, Resolution, and Scaling).

**Access OCR for AnyDoc Form Family Management**

- 4 Select a radio button in the **Type** section to specify the file format in which attachment images are archived.



The **TIFF Compression**, **Orientation**, **Resolution**, and **Scaling** sections are only available if the Custom radio button is selected in the Image Options section.

- 5 Select a compression at which .TIF images are archived from the **TIFF Compression** drop down list.
- 6 In the **Orientation** section, click the **Rotate** button to change the orientation of the attachment to be archived.
- 7 To specify the resolution of the attachments to be archived, enter a number (in DPI) in the **(h)** and **(v)** fields of the **Resolution** section.
- 8 Select the **Scaling** check box and enter a number in the **(w)** and **(h)** fields to set a width and height for the attachment.
- 9 Select the check box to **Archive Color Images**, if needed.
- 10 Select the **As PDF** check box to archive color images as PDFs.
- 11 Click **OK**.

## Document Control

The **Attachment Page Settings | Document Control** tab allows you to include ASCII data—such as the date, time, operator, or batch information—in the output record for an attachment page.

### Steps

- 1 Select **Settings | OCR for AnyDoc Form Family Management | Attachments**. The **Attachment Page Settings** window is displayed.

## Access OCR for AnyDoc Form Family Management

- 2 Click the **Document Control** tab.

The dialog box is titled "Attachment Page Settings - 9SF Invoice Form Family". It has a left sidebar with tabs: "General Settings", "Archive Options", and "Document Control" (which is selected). The main area contains the following controls:

- Document Control Expression:** A text field with a dropdown arrow.
- System Defined Control Fields:** A list box containing:
  - Auto ID Rotation
  - Batch Auto Total (Batch Equation Calculated)
  - Batch Auto Total 2 (Calculated)
  - Batch Auto Total 3 (Calculated)
  - Batch Control Number (User Assigned)
  - Batch Date
  - Batch ID (System Assigned)
- Buttons:** "Add Field", "Date Formatting...", "Propagate Output From Another Template...", and "Add Prompting Control..."
- Field Delimiters:** A section with a checked box "Insert delimiter character(s)" and input fields for " before and " after.
- Record Terminator:** A section with a label "Terminate Record with" and a text field containing "\r".
- Combine with Family Level:** A checked checkbox.
- Defaults:** A button.
- OK/Cancel:** Buttons at the bottom right.

- 3 Select an option from the **System Defined Control Fields** list and click **Add Field**. The field is added to the **Document Control Expression** field. Options in the System Defined Control Fields list include:

Field	Expression	Output / Description
Auto ID Rotation	<S_IDROTATION>	Outputs the rotation (0°, 90°, 180°, or 270°) of the data image.
Batch Auto Total (Batch Equation Calculated)	<B_AUTOTOTAL>	Outputs the total amount for a batch total equation without having to define the result.
Batch Auto Total 2 (Calculated)	<B_AUTOTOTAL2>	Outputs the total amount for an equation without having to define the result.
Batch Auto Total 3 (Calculated)	<B_AUTOTOTAL3>	Outputs the total amount for an equation without having to define the result.
BancTec/SpeedFirst Batch Input Fields (ONX)	<BANCTEC_ONX>	Outputs information created when scanning from a BancTec scanner.
Batch Control Number (User Assigned)	<B_CTRL_NUMBER>	Outputs the user-defined batch control number.

**Access OCR for AnyDoc Form Family Management**

<b>Field</b>	<b>Expression</b>	<b>Output / Description</b>
Batch Date	<B_DATE>	Outputs the date the batch was created.
Batch ID (System Assigned)	<B_NUMBER>	Outputs the system assigned batch number.
Batch Operator	<B_OPER>	Outputs the network ID of station that created the batch, or if logins are used, the user name.
Batch Sequence Nbr ####	<S_BSEQ>	Outputs the sequence number of the image within the batch as a 4-digit number. For example, the third image in the batch would output "0003".
Batch Sequence Nbr #####	<S_BSEQ_05>	Outputs the sequence number of the image within the batch as a 5-digit number. For example, the third image in the batch would output "00003".
Batch Time	<B_TIME>	Outputs the time in hour:minute:second format that the batch was created.
Batch Total (Prompted)	<B_TOTAL>	Outputs the result of a defined batch total equation.
CAPTUREit Batch ID	<ASI_CAPTURE_BATCH_ID>	Outputs the batch ID from CAPTUREit if the batch was scanned with CAPTUREit.
Document Nbr 1 #####	<DOC_F1>	Outputs the image's file name.
Document Nbr 2 c:\..\#####.tif	<DOC_F2>	Outputs the fully qualified path and image file name with .tif extension after Commit.
Document Nbr 3 #####.tif	<DOC_F3>	Outputs the image's file name with .tif extension after Commit.
Document Set AutoTotal	<DS_AUTOTOTAL>	Outputs the total value for an equation per Document Set.
Document Set Number in Batch	<DS_NBR_IN_BATCH>	Outputs the sequence of the document set within the batch.
Document Set Page Sequence	<DS_PGSEQ>	Outputs the sequence of the page within the document set.
Document Set Total Number of Pages	<DS_TOTAL>	Outputs the total number of pages in the document set.

## Access OCR for AnyDoc Form Family Management

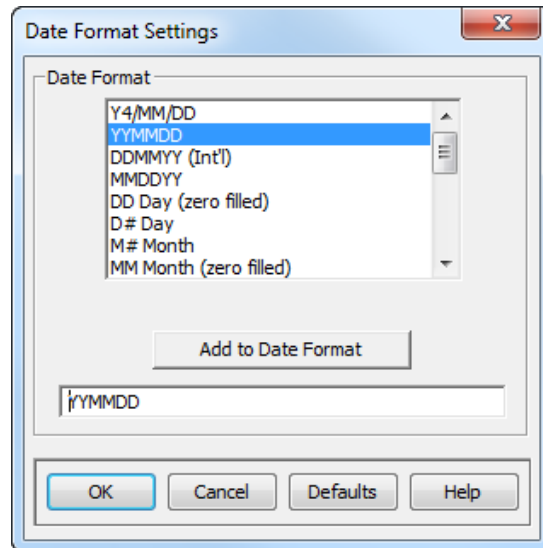
Field	Expression	Output / Description
Extract Date	<X_DATE>	Outputs the date the image was extracted.
Extract Operator	<X_OPER>	Outputs the network ID of the extraction station, or if logins are used, the user name.
Extract Time HH:MM:SS	<X_TIME>	Outputs the time in hour:minute:second format that the image was extracted.
Image Creation Date	<I_DATE>	Outputs the date the image was imported into the system.
Image Creation Time HH:MM:SS	<I_TIME>	Outputs the time the image was imported into the system.
Imprinter String	<S_IMPRINTER>	Outputs the imprinter string configured under <b>Settings   Scanner Setup   Imprinter</b> .
Number of Doc Sets	<B_NBR_OF_DOCSETS>	Outputs the total number of document sets in the batch.
Number of Documents	<B_NBR_OF_DOCS>	Outputs the total number of images in the batch.
Number of Line Items	<B_NBR_OF_LINEITEMS>	Outputs the number of total line items in an AnyApp template.
Number of Total Sets	<B_NBR_OF_TOTALSETS>	Outputs the number of total sets in an AnyApp template.
Orig Doc Multi-Page Sequence	<ORIG_DOC_SEQ>	Outputs the sequence of the image from within a multipage tiff.
Orig Doc Nbr 1 #####	<ORIG_DOC_F1>	Outputs the imported image's original file name.
Orig Doc Nbr 2 c:\..\#####.tif	<ORIG_DOC_F2>	Outputs the fully qualified path and the original image's file name with .tif extension after Commit.
Orig Doc Nbr 3 #####.tif	<ORIG_DOC_F3>	Outputs the imported image's original file name followed by the extension .tif.
Orig PDF Archive Copy 2 c:\..\#####.pdf	<ARCHIVE_ORIG_DOC_F2>	Outputs the fully qualified archive path and subdirectory of the original image copy and the original .pdf file name. The archive directory location

**Access OCR for AnyDoc Form Family Management**

Field	Expression	Output / Description
		is set on the <b>Directories/Output Settings   Archive Image Options</b> window.
Previous Index Fields	<PREV_INDEX_FIELDS>	This applies to attachments only. Any index fields on the previous data image are output in the document control expression for the attachment.
QA Date	<Q_DATE:MM/DD/YY>	Outputs the date the batch was reviewed by the QA Operator.
QA Operator	<Q_OPER>	Outputs the user name of the QA operator.
QA Time HH:MM:SS	<Q_TIME>	Outputs the time in hour:minute:second format that the batch was released by the QA phase.
Scan/Import Operator	<S_OPER>	Outputs the user name of the Scan or Import station.
ScanErrors	<SCAN_ERRORS>	Outputs any messages of scan errors that occurred during the scan time.
ScanErrorsTime	<SCAN_ERROR_TIME>	Outputs the time that the scan error occurred.
ScanTotalTime	<SCAN_TOTAL_TIME>	Outputs the total amount of time to scan the batch.
System Import Date MM/DD/YY	<S_DATE>	Outputs the date the image was Imported by OCR for AnyDoc.
System Import Time	<S_TIME>	Outputs the time in hour:minute:second format that the image was scanned or imported.
Template Name	<FRM_ID>	Outputs the file name (no extension) of the master form template the current data image has been identified as matching.
Verify Date	<V_DATE>	Outputs the date the image was verified.
Verify Operator	<V_OPER>	Outputs the user name of the Verification operator.

Field	Expression	Output / Description
Verify Time HH:MM:SS	<V_TIME>	Outputs the time in hour:minute:second format that the image was verified.

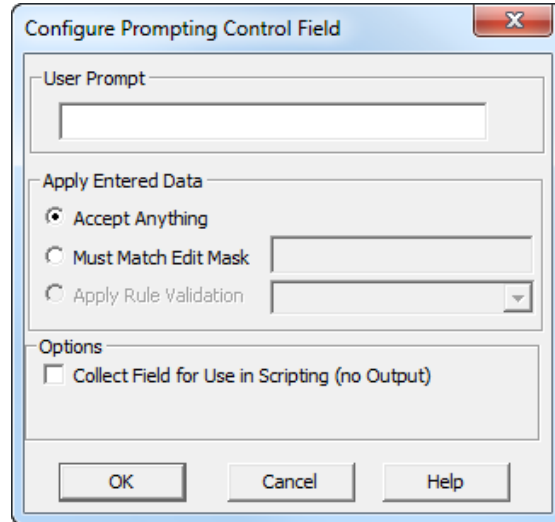
- To set the output format for a date field in the Document Control Expression, click the **Date Formatting** button and select the date field to format. The **Date Format Settings** window is displayed.



- Select a **Date Format** and click **Add to Date Format**. The selected date format is displayed in the field below the Add to Date Format button.
- Click **OK** to close the **Date Format Settings** window and return to the **Document Control** tab. The system-defined date field has been updated with the date format (for example, <B\_DATE> could be formatted <B\_DATE:YYMMDD>).
- To copy output from a zone on one template into the document control expression for all templates in the form family, click the **Propagate Output From Another Template** button. The **Select Template And Zone Name** dialog is displayed. See [Propagate Output from Another Template](#) (page 375).

**Access OCR for AnyDoc Form Family Management**

- 8 To prompt the operator to add information to the control expression, click the **Add Prompting Control** button. The **Configure Prompting Control Field** window is displayed.



- 9 Enter text into the **User Prompt** field with which to prompt the Scan or Import operator.
- 10 Enable a radio button in the **Apply Entered Data** section to set limits on what data is valid in the prompting control field. Options include:
- **Accept Anything:** The system does not restrict what the operator enters in the field.
  - **Must Match Edit Mask:** The data entered by the operator in the field must match the edit mask entered in the field to the left of this radio button.
  - **Apply Rule Validation:** This option only applies to dates. It restricts the format of the date entered by the operator to the required format selected from the drop down list to the left of the radio button.
- 11 Click **OK** to close the **Configure Prompting Control Field** window. Enable the **Insert delimiter character(s)** check box to insert the delimiters entered in the **before** and **after** fields. The characters entered in the **before** and **after** fields are placed before and after each field in the output record.
- 12 Enter a character in the **Terminate Record with** field to specify the character that indicates the end of the ASCII output. Options include:
- A null character
  - **\t** to output a tab
  - **\r** or **\n** to output a carriage return
  - **\f** to output a form feed

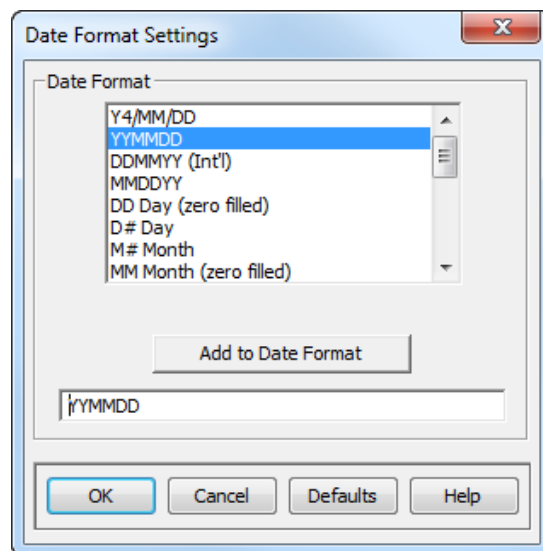


- 13 Enable the **Combine with Family Level** check box to output the document control defined for the form family with the document control defined here for Attachments.
- 14 Click **OK** to close the **Attachment Page Settings** window.

## Date Formatting

### Steps

- 1 From the **Date Format Settings** window, select a **Date Format** from the provided list and click **Add to Date Format**. The selected date format is displayed in the field below the Add to Date Format button.



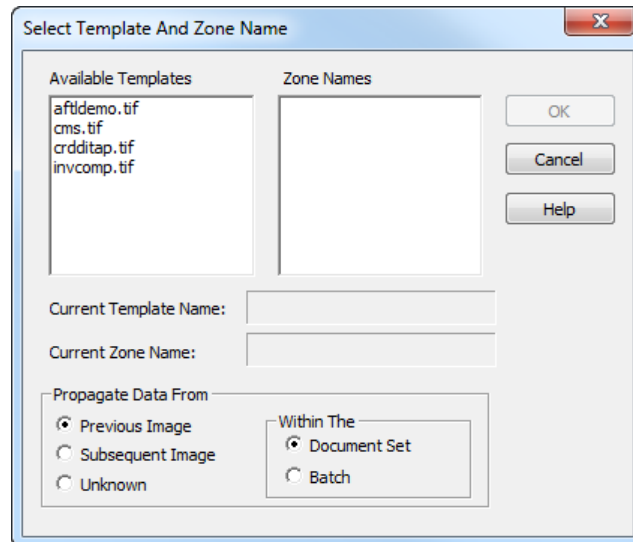
- 2 To add the date format to the control expression field, click **OK**.

## Propagate Output from Another Template

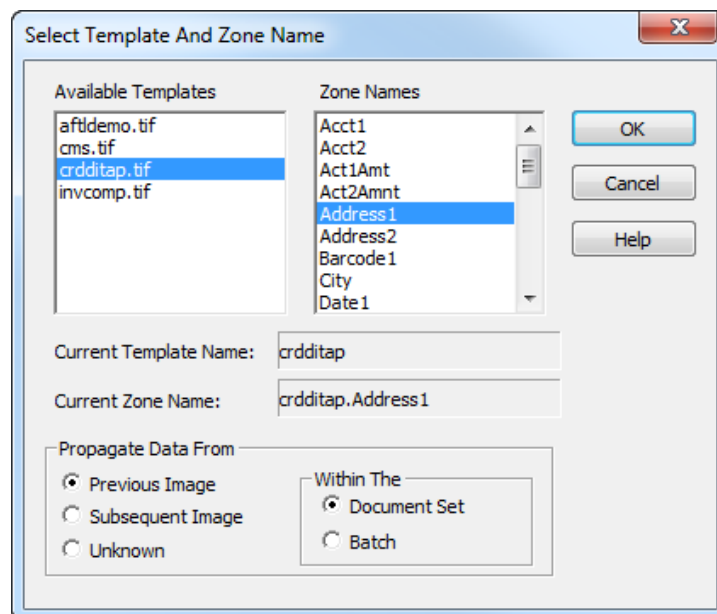
### Steps

**Access OCR for AnyDoc Form Family Management**

- 1 From the **Document Control** tab, click the **Propagate Output From Another Template** button. The **Select Template And Zone Name** window is displayed.



- 2 Select an **Available Template** from the list. This field displays all templates in the form family. The **Zone Names** field populates with the zones associated with the selected template.

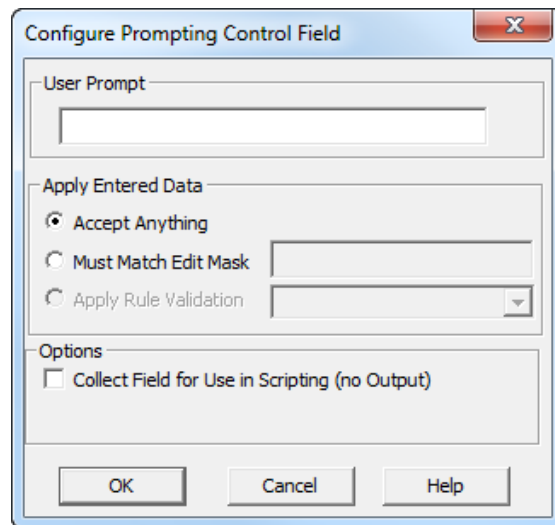


- 3 Double-click each zone name to add to the document control expression.
- 4 Enable a radio button in the **Propagate Date From** section to specify where the data image for the selected template is in the batch. Options include:
  - **Previous Image:** If the zone is located on the previous image in the doc set or batch.

- **Subsequent Image:** If the zone is on the page after the current page in the doc set or batch.
  - **Unknown:** If the zone is on an image either before or after the current page.
- 5 Enable one of the radio buttons in the **Within The** section to determine whether the application looks in the **Document Set** or the **Batch** for the page containing the specified zone.
  - 6 Click **OK** to close the **Select Template And Zone Name** window.

## Configure Prompting Control Field

- 1 To prompt the operator to add information to the control expression, click the **Add Prompting Control** button. The **Configure Prompting Control Field** window is displayed.



- 2 Enter text into the **User Prompt** field with which to prompt the Scan or Import operator.
- 3 Enable a radio button in the **Apply Entered Data** section to set limits on what data is valid in the prompting control field. Options include:
  - **Accept Anything:** The system does not restrict what the operator enters in the field.
  - **Must Match Edit Mask:** The data entered by the operator in the field must match the edit mask entered in the field to the left of this radio button.

**Access OCR for AnyDoc Form Family Management**

- **Apply Rule Validation:** This option only applies to dates. It restricts the format of the date entered by the operator to the required format selected from the drop down list to the left of the radio button.

4 Click **OK** to close the **Configure Prompting Control Field** window.

## Verification Settings

Through the Verification Settings window you can perform the following:

- Determine which Verification operators verify batches for the form family
- Specify what options are available to the operators
- Determine if the form family is available in VERIFYit

To access the Verification Settings window, select **Settings | OCR for AnyDoc® Form Family Management | Verification**.

The High Speed and Balancing tabs provide the ability to restrict these two Verification phases to specific users and/or operator groups. The fields in the two tabs are identical, but apply to different phases.

- The High Speed Verification phase gathers all the questionable characters from alpha and numeric fields in the batch for the Verification operator to correct at the same time. This phase is activated at the template level in Parameters | Verification.
- The Balancing Verification phase is used with batch equations. When a batch is out of balance, the Verification operator must review the batch and determine the cause of the imbalance.

---

**Access OCR for AnyDoc Form Family Management**

By default, the form family can be accessed by all users and operator groups in the High Speed and Balancing Verification phases. Operator groups appear in square brackets; if you select an operator group, all users assigned to that group have access to this form family in this phase.

The Pass 1, Pass 2 and Supervisor tabs provide the ability to optionally restrict these three Verification phases to specific users and/or operator groups. In addition, each user or operator group can be assigned to specific templates in the form family. The fields in the three tabs are identical and just apply to different phases.

- Pass 1 Verification phase is the standard for batch verification.
- Pass 2 Verification phase is used in double-key verification.
- Supervisor Verification phase is used to verify any images that had a sticky note attached during other Verification phases or to review zones flagged for Audit.

By default, the form family can be accessed by all users and operator groups in all three Verification phases. Operator groups appear in square brackets. If you select an operator group, all users assigned to that group have access to this form family in this phase.

From the VERIFYit tab you can determine the following:

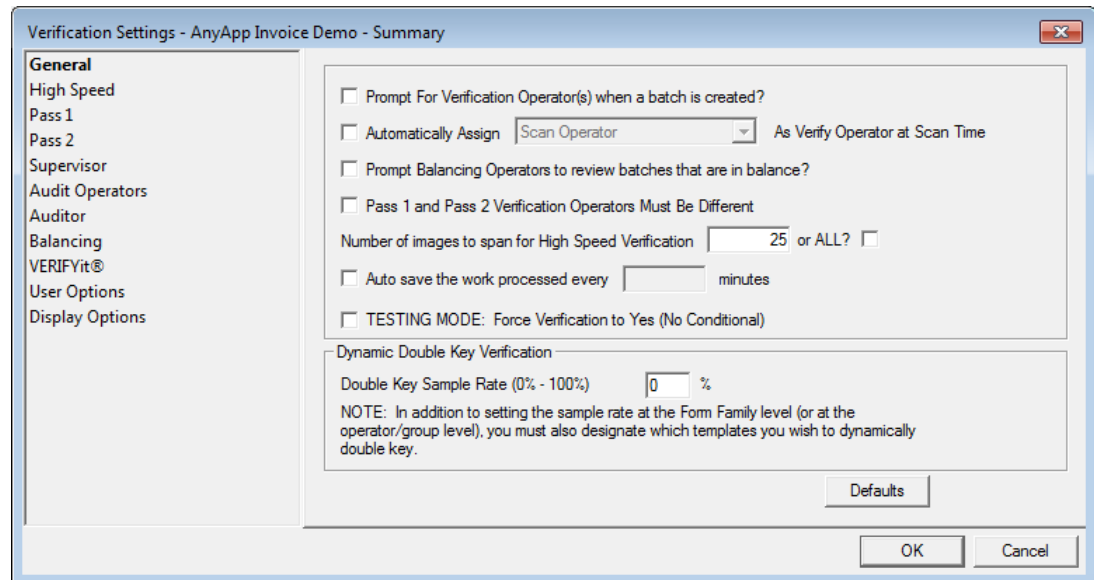
- Whether or not the form family is available in VERIFYit
- How long a VERIFYit operator can have an image checked out
- How many images a VERIFYit operator can download at the same time

## General Verification Settings

### Steps

**Access OCR for AnyDoc Form Family Management**

- 1 Select **Settings | OCR for AnyDoc Form Family Management | Verification**. The **Verification Settings** window is displayed.



- 2 Select the **Prompt For Verification Operator(s) when a batch is created?** check box to have the Scan/Import operator assign the Verification operator.  
If no operators are assigned, all operators logged into the system and polling for Verification work are eligible to verify pending batches. Verifiers should only be assigned to a form family to limit who may verify that particular form family.
- 3 Select the **Automatically Assign \_\_\_\_ as Verification Operator(s) at Scan Time** check box to specify the Verification operator. A group or individual Scan operator can be selected.
- 4 Select the **Prompt Balancing Operators to review batches that are in balance?** check box, if needed.  
Typically, the Balancing operator only views batches that are imbalanced. Selecting this option does not force the operator to view the batch, it provides the operator with the option of viewing the batch. This feature only applies to form families using batch equations.
- 5 Select the **Pass 1 and Pass 2 Verification Operators Must Be Different** check box to require two different Verification operators for Pass 1 and Pass 2 during double-key Verification. For this option to operate properly, you must select the Verification check box in the One Station Per Batch section in the **Batch Control | Performance** tab.
- 6 To set a specific number of images to be shown to the High Speed Verification operator at once, enter a number in the **Number of images to span for High Speed Verification** field. Alternatively, select the **ALL?** check box to have all images shown to the operator.

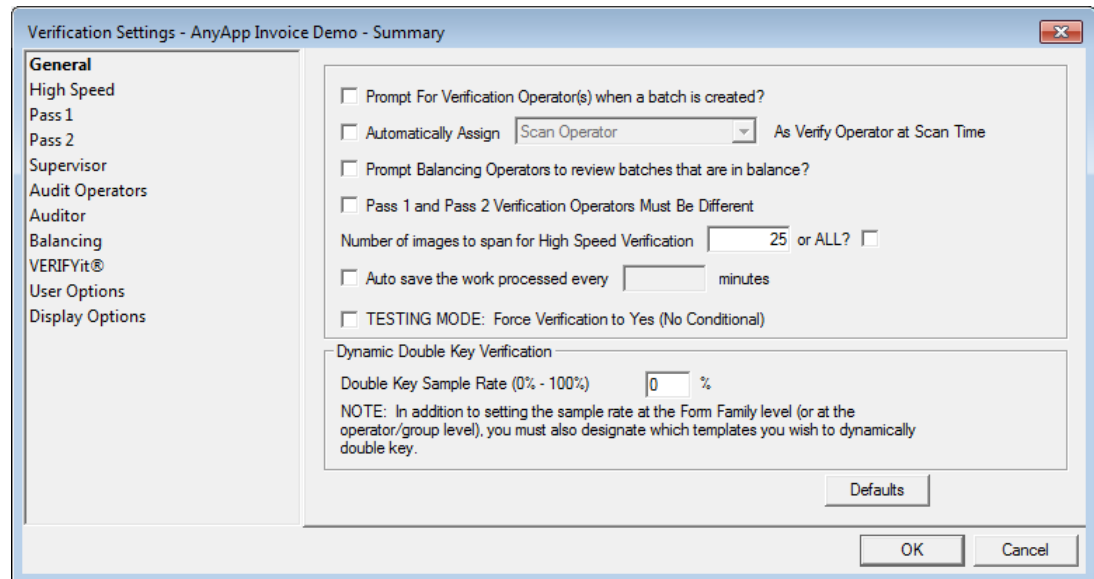
## Access OCR for AnyDoc Form Family Management

- 7 Select the **Auto save the work processed every \_\_ minutes** check box and enter the number of minutes the Verification operator's work must be saved.
- 8 Select the **TESTING MODE: Force Verification to Yes (No Conditional)** check box to display all zones to the Verification operator even if the template is only configured for conditional verification.
- 9 In the **Dynamic Double Key Sample Rate (0%-100%)** field, specify the percentage of random zones to double key. The same percentage rate can be used for all users at the family level, or it can be set at the user level. This percentage is required if the **Dynamic Double Key Verification by Pass 2 Operator** option is selected on the **Verification Parameters | Double Key** tab in OCR for AnyDoc. For more information, see the section on Verification Parameters | Double Key Tab in the **OCR for AnyDoc User Guide**. This feature is only available in the KFI Verifier.
- 10 Click **OK**.

## High Speed and Balancing Options

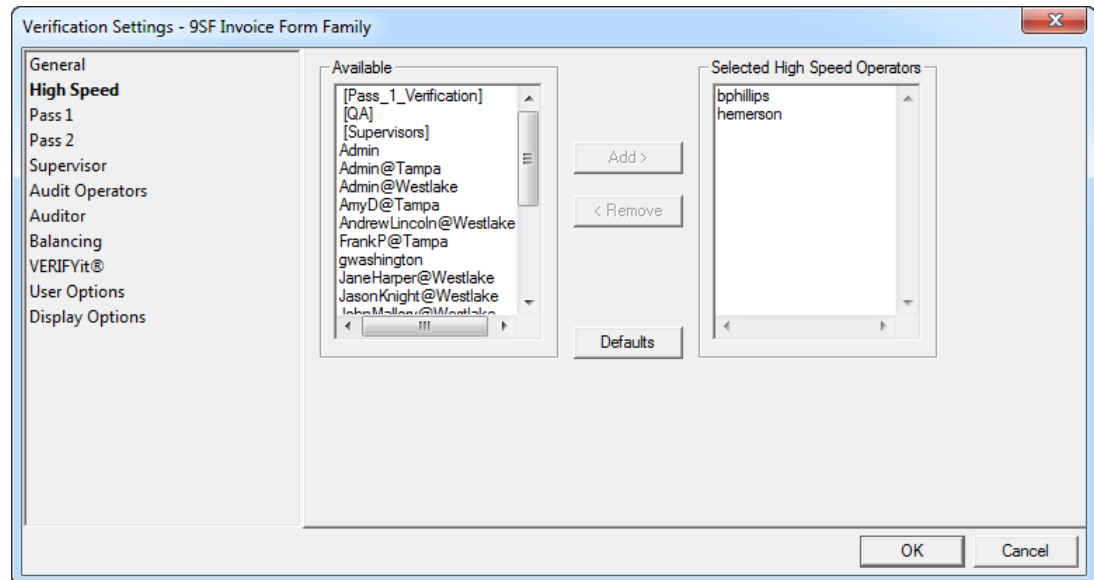
### Steps

- 1 Select **Settings | OCR for AnyDoc Form Family Management | Verification**. The **Verification Settings** window is displayed.



**Access OCR for AnyDoc Form Family Management**

- Click the **High Speed** or **Balancing** tab. Since the tabs are identical, for the purposes of this procedure the High Speed tab is used.



- To assign a user to the selected operators group, select a name from the **Available** field and click **Add**. The user's name is removed from the **Available** operators field and added to the **Selected** operators field.
- To remove a user from a group, select a name from the **Selected** operators field and click **Remove**. The user's name is removed from the **Selected** operators field and added to the **Available** operators field.
- Click **OK**.

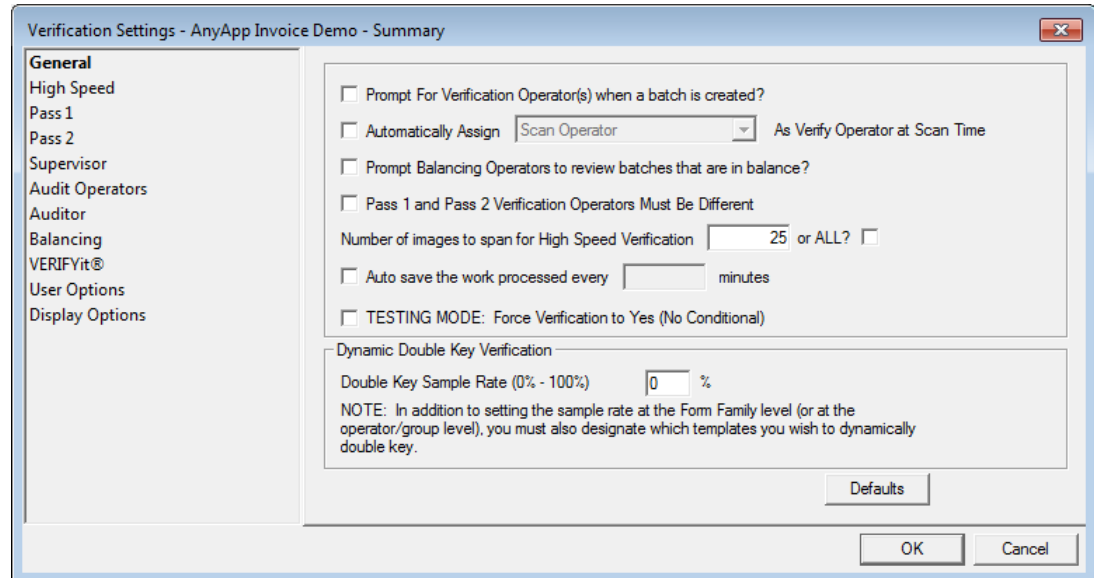
## Pass 1, Pass 2, and Supervisor Options

### Steps



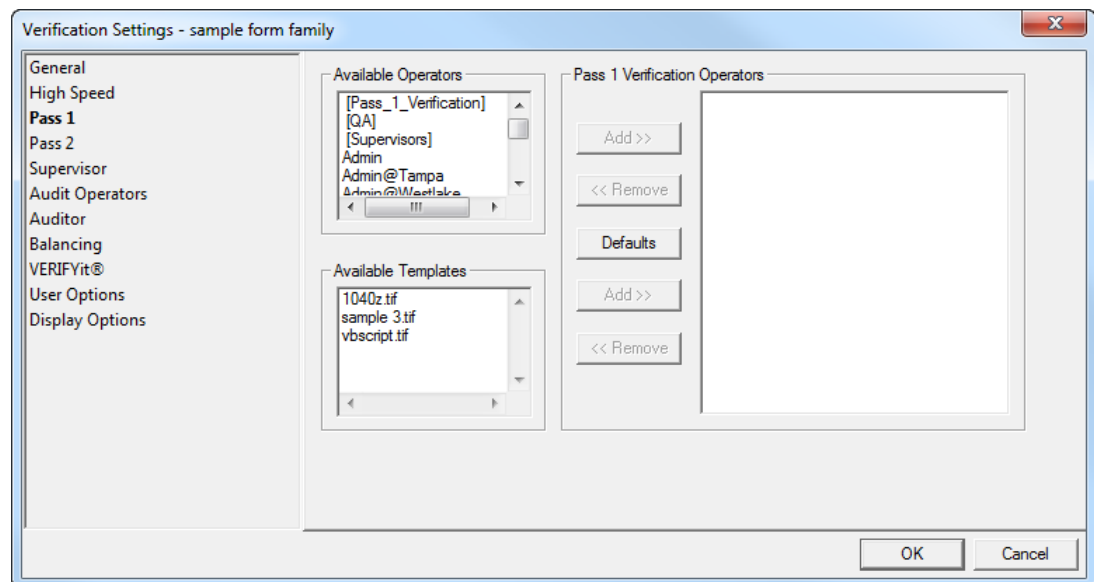
## Access OCR for AnyDoc Form Family Management

- 1 Select **Settings | OCR for AnyDoc Form Family Management | Verification**. The **Verification Settings** window is displayed.



The screenshot shows the 'Verification Settings - AnyApp Invoice Demo - Summary' window. On the left is a sidebar with a tree view containing: General, High Speed, Pass 1, Pass 2, Supervisor, Audit Operators, Auditor, Balancing, VERIFYit®, User Options, and Display Options. The 'General' tab is selected. The main area contains several checkboxes: 'Prompt For Verification Operator(s) when a batch is created?' (unchecked), 'Automatically Assign' (checked) with a dropdown menu showing 'Scan Operator' and the text 'As Verify Operator at Scan Time', 'Prompt Balancing Operators to review batches that are in balance?' (unchecked), 'Pass 1 and Pass 2 Verification Operators Must Be Different' (unchecked), 'Number of images to span for High Speed Verification' (25) with an 'or ALL?' checkbox (unchecked), 'Auto save the work processed every' (blank) minutes, and 'TESTING MODE: Force Verification to Yes (No Conditional)' (unchecked). Below these is a section for 'Dynamic Double Key Verification' with a 'Double Key Sample Rate (0% - 100%)' set to 0%. A note states: 'NOTE: In addition to setting the sample rate at the Form Family level (or at the operator/group level), you must also designate which templates you wish to dynamically double key.' At the bottom right are 'Defaults', 'OK', and 'Cancel' buttons.

- 2 Click the **Pass 1**, **Pass 2**, or **Supervisor** tab. Since the tabs are identical, for the purposes of this procedure the Pass 1 tab is used.



The screenshot shows the 'Verification Settings - sample form family' window. The sidebar on the left is the same as in the previous window, but the 'Pass 1' tab is now selected. The main area is divided into two sections. The left section has two list boxes: 'Available Operators' containing '[Pass\_1\_Verification]', '[QA]', '[Supervisors]', 'Admin', 'Admin@Tampa', and 'Admin@Wastlake'; and 'Available Templates' containing '1040z.tif', 'sample 3.tif', and 'vbscript.tif'. The right section is titled 'Pass 1 Verification Operators' and contains a large empty box. Between these sections are buttons: 'Add >>', '<< Remove', 'Defaults', 'Add >>', and '<< Remove'. At the bottom right are 'OK' and 'Cancel' buttons.

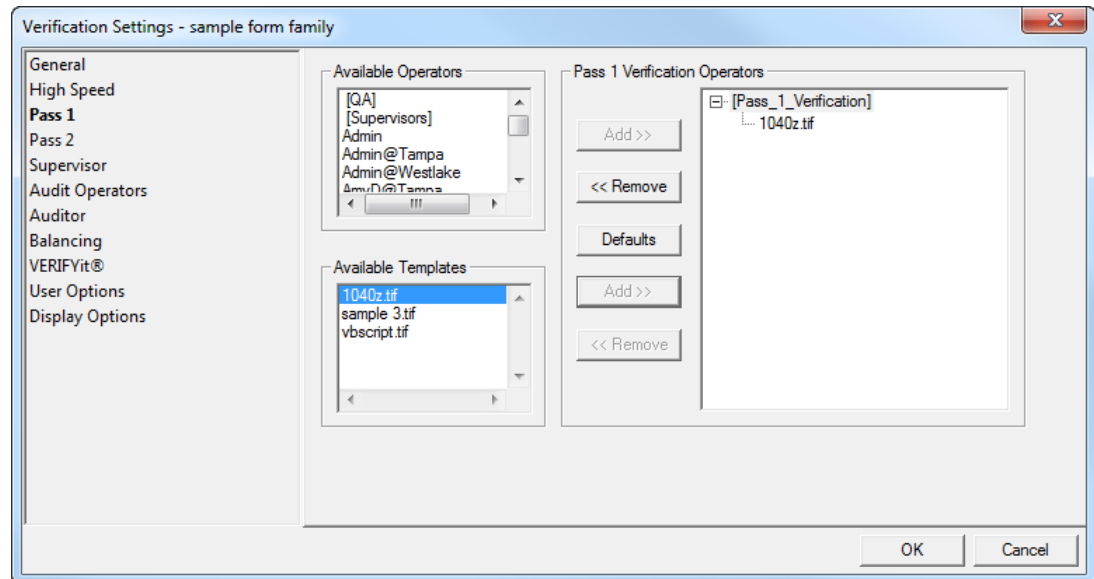
- 3 To add a user to the an operator group, select a name in the **Available Operators** field and click **Add**. The user is added to the **Verification Operators** field and removed from the **Available Operators** field.



The **Available Operators** field lists users and operator groups that are not currently assigned to the selected form family for this phase. If no users are assigned to the form family, then all users have access to it.

**Access OCR for AnyDoc Form Family Management**

- 4 To remove a user from an operator group, select a name in the **Verification Operators** field and click **Remove**. The user is removed from the **Verification Operators** field and added to the **Available Operators** field.
- 5 To assign a user or operator group to a specific template, select the template from the **Available Templates** field, select a user or operator group from the **Verification Operator** field, and click **Add**. The assigned template is displayed below the user and/or operator group it is assigned to.



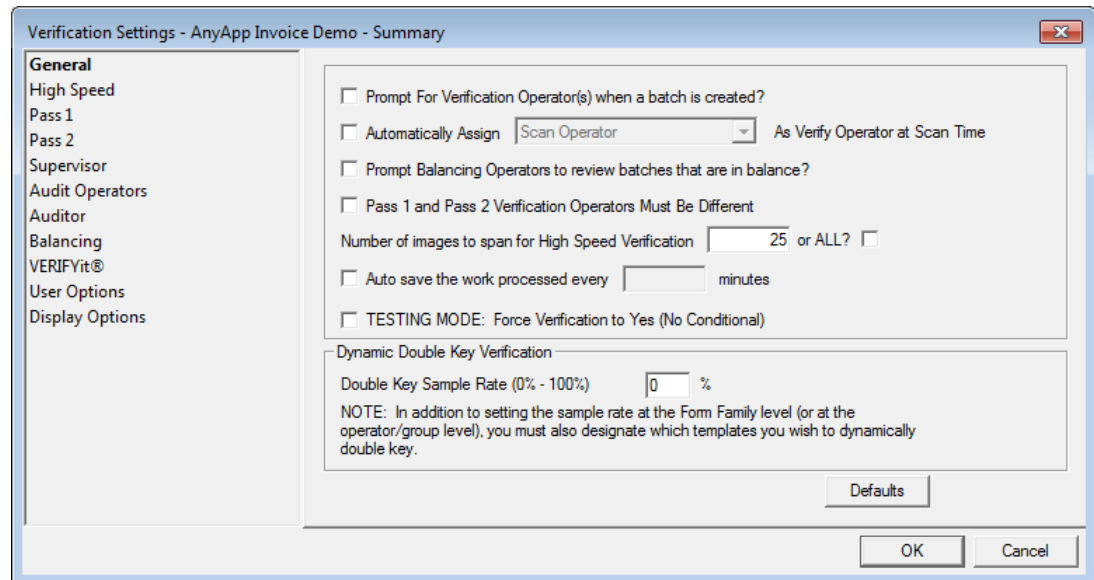
- 6 To remove an assigned template from an user or operator group, select the template under the user or operator group's name and click **Remove**. The template is removed from the user or operator group.
- 7 Click **OK**.

## VERIFYit Options

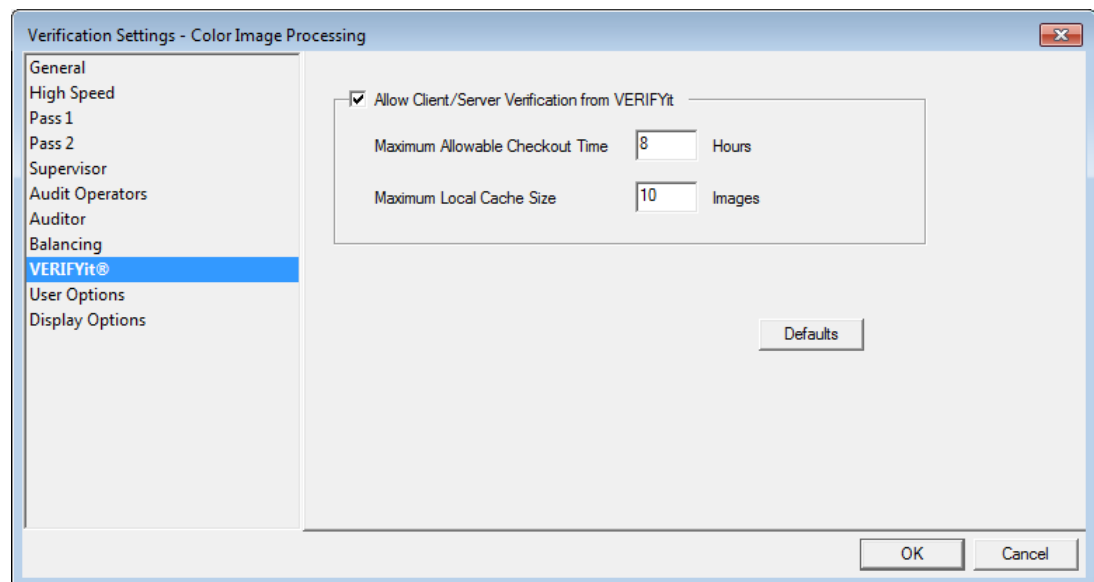
### Steps

## Access OCR for AnyDoc Form Family Management

- 1 Select **Settings | OCR for AnyDoc Form Family Management | Verification**. The **Verification Settings** window is displayed.



- 2 Click the **VERIFYit** tab.



- 3 To have the form family appear in VERIFYit, enable the **Allow Client/Server Verification from VERIFYit** check box.
- 4 Enter a number in the **Maximum Allowable Checkout Time** \_\_\_\_ **Hours** field to specify the maximum number of hours an operator is allowed to have an image checked out from the server.

**Access OCR for AnyDoc Form Family Management**

- 5 Enter a number in the **Maximum Local Cache Size \_\_\_\_ Images** field to specify the maximum number of images an operator can have checked out from the server at one time.
- 6 Click **OK**.

## User Options

### Steps

- 1 Select **Settings | OCR for AnyDoc Form Family Management | Verification**. The **Verification Settings** window is displayed.

Verification Settings - AnyApp Invoice Demo - Summary

**General**

- High Speed
- Pass 1
- Pass 2
- Supervisor
- Audit Operators
- Auditor
- Balancing
- VERIFYit®
- User Options
- Display Options

☐ Prompt For Verification Operator(s) when a batch is created?

☐ Automatically Assign Scan Operator As Verify Operator at Scan Time

☐ Prompt Balancing Operators to review batches that are in balance?

☐ Pass 1 and Pass 2 Verification Operators Must Be Different

Number of images to span for High Speed Verification  or ALL? ☐

☐ Auto save the work processed every  minutes

☐ TESTING MODE: Force Verification to Yes (No Conditional)

Dynamic Double Key Verification

Double Key Sample Rate (0% - 100%)  %

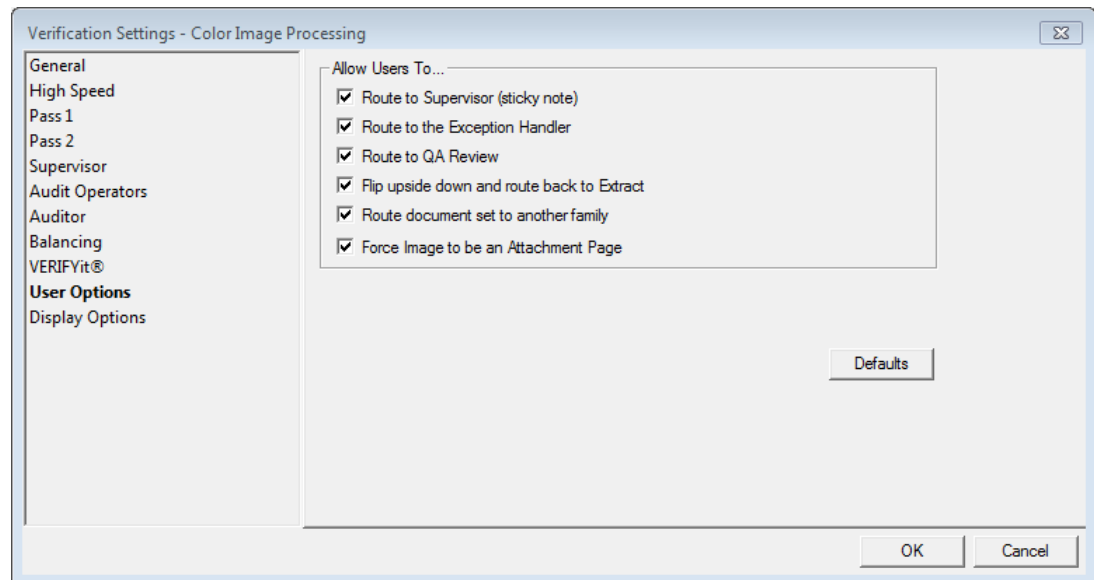
NOTE: In addition to setting the sample rate at the Form Family level (or at the operator/group level), you must also designate which templates you wish to dynamically double key.

Defaults

OK Cancel

**Access OCR for AnyDoc Form Family Management**

- 2 Click the **User Options** tab.



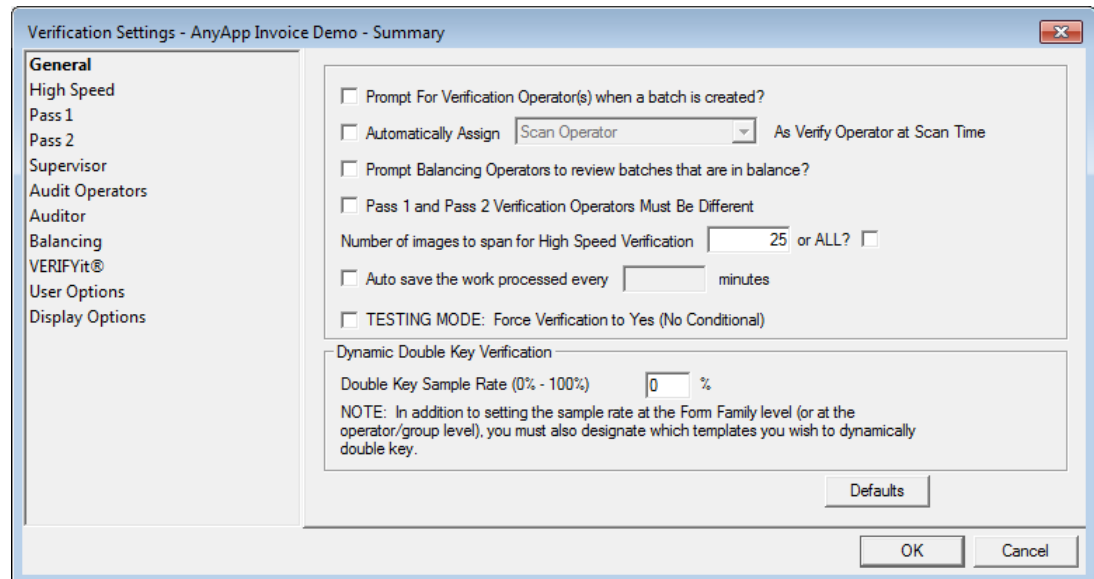
- 3 Enable the **Route to Supervisor (sticky note)** check box to allow Verification operators to route an image to Supervisor Verification for review by attaching a sticky note with a message to the supervisor.
- 4 Enable the **Route to the Exception Handler** check box to allow Verification operators to route a misidentified image to the Exception phase where it can be manually identified by an Exception operator.
- 5 Enable the **Route to QA Review** check box to allow Verification operators to route an image to the Review phase. This is usually due to poor image quality.
- 6 Enable the **Flip upside down and route back to Extract** check box to allow Verification operators to flip an image upside down and send it back to Extractions so the data can be extracted properly.
- 7 Enable the **Route document set to another family** check box to allow Verification operators to route an image or document set to a different form family if that option is enabled in the Delete/Reroute Settings for the current form family.
- 8 Enable the **Force Image to be an Attachment Page** check box to allow Verification operators to turn any image into an attachment.
- 9 Click **OK**.

## Auditor Options

### Steps

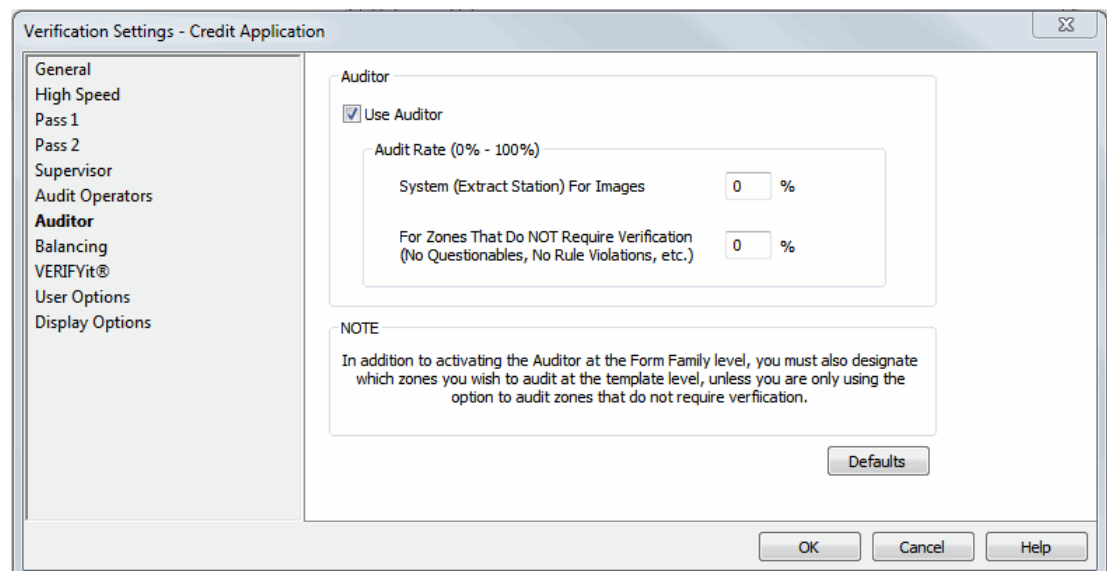
**Access OCR for AnyDoc Form Family Management**

- 1 Select **Settings | OCR for AnyDoc Form Family Management | Verification**.  
The Verification Settings window is displayed.



The screenshot shows the 'Verification Settings - AnyApp Invoice Demo - Summary' window. On the left is a sidebar with a tree view containing: General, High Speed, Pass 1, Pass 2, Supervisor, Audit Operators, Auditor, Balancing, VERIFYit®, User Options, and Display Options. The 'General' tab is selected. The main area contains several checkboxes: 'Prompt For Verification Operator(s) when a batch is created?' (unchecked), 'Automatically Assign' (checked) with a dropdown menu showing 'Scan Operator' and the text 'As Verify Operator at Scan Time', 'Prompt Balancing Operators to review batches that are in balance?' (unchecked), 'Pass 1 and Pass 2 Verification Operators Must Be Different' (unchecked), 'Number of images to span for High Speed Verification' (25) with an 'or ALL?' checkbox (unchecked), 'Auto save the work processed every' (blank) minutes, and 'TESTING MODE: Force Verification to Yes (No Conditional)' (unchecked). Below these is a section for 'Dynamic Double Key Verification' with a 'Double Key Sample Rate (0% - 100%)' set to 0%. A note states: 'NOTE: In addition to setting the sample rate at the Form Family level (or at the operator/group level), you must also designate which templates you wish to dynamically double key.' At the bottom right are 'Defaults', 'OK', and 'Cancel' buttons.

- 2 Click the **Auditor** tab.



The screenshot shows the 'Verification Settings - Credit Application' window. The sidebar on the left is the same as in the previous window, but the 'Auditor' tab is now selected. The main area is titled 'Auditor' and contains a 'Use Auditor' checkbox which is checked. Below it is an 'Audit Rate (0% - 100%)' section with two sub-sections: 'System (Extract Station) For Images' set to 0% and 'For Zones That Do NOT Require Verification (No Questionables, No Rule Violations, etc.)' set to 0%. A note states: 'NOTE: In addition to activating the Auditor at the Form Family level, you must also designate which zones you wish to audit at the template level, unless you are only using the option to audit zones that do not require verification.' At the bottom right are 'Defaults', 'OK', 'Cancel', and 'Help' buttons.

- 3 Select the **Use Auditor** check box to apply auditor functionality to form family batches.
- 4 Enter a number in the **System (Extract Station) For Images** \_\_\_\_ % field to set the minimum percentage of forms to audit for the form family. The specified percentage of forms is flagged for Audit during Extraction. The actual Audit step only takes place if specific templates or zones are flagged to be audited.

**Access OCR for AnyDoc Form Family Management**

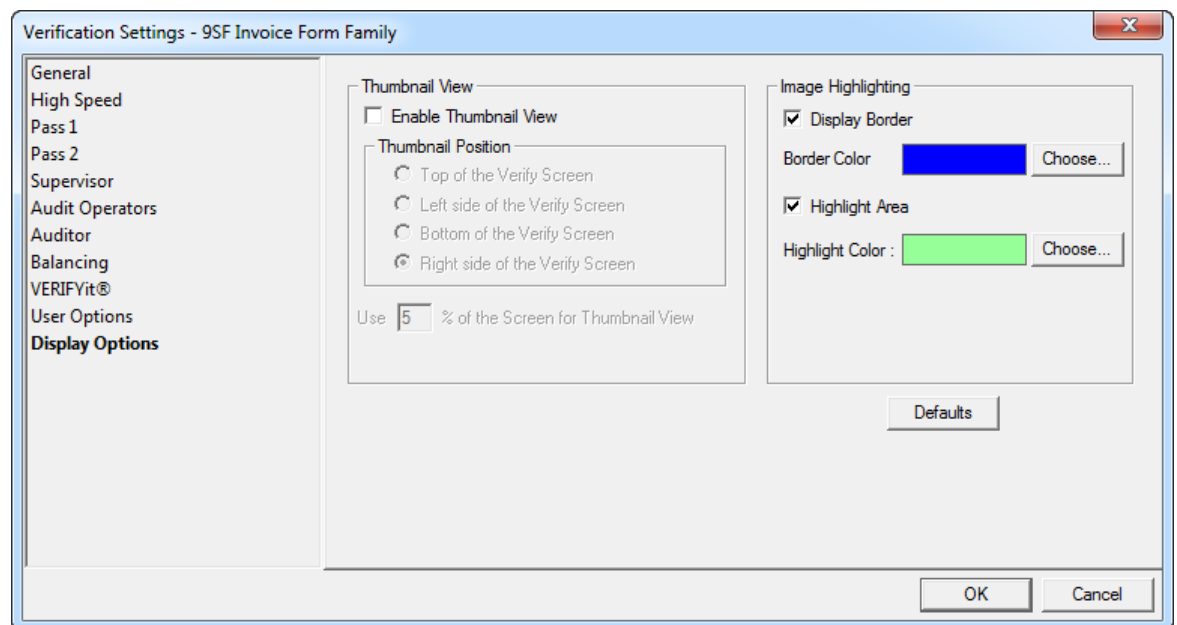
- 5 Enter a number in the **For Zones that Do NOT Require Verification** \_\_\_\_ % field to set the percentage of post-extract data fields to flag for audit. A data field is considered for selection only if it derived from an OCR/ICR recognition engine, has no questionable characters, and passes all rules.
- 6 Click **OK**.



For more information about auditing forms and zones, see the sections on Auditor Functionality and Audit Triggers in the **OCR for AnyDoc User Guide**.

## Display Options

Images in an AnyApp document set can be displayed in the Verification window with or without a border, highlighted a specific color, and as thumbnail images. When displaying these options, the border and highlight colors and thumbnail locations and size must be specified.



### Thumbnail View

Option	Description
Enable Thumbnail View	Select this check box to display all images in the current document set in a thumbnail window.
Thumbnail Position	Select the location where the thumbnail window is displayed. Options include: <ul style="list-style-type: none"> <li>• Top of the Verify Screen</li> <li>• Left Side of the Verify Screen</li> </ul>

**Access OCR for AnyDoc Form Family Management**

Option	Description
	<ul style="list-style-type: none"><li>• Bottom of the Verify Screen</li><li>• Right Side of the Verify Screen</li></ul>
Use ____ % of the Verify Screen for Thumbnail View	Specify the percentage of the Verification window that should be used to display the thumbnail window.

**Image Highlighting**

Option	Description
Display Border	Select this check box to display a border around the displayed image.
Border Color	If displaying a border around the displayed image, click Choose to select the border color.
Highlight Area	Select this check box to highlight the background of the displayed field.
Highlight Color	If highlighting the displayed field, click Choose to select the highlight color.

## Working with Keyboard Shortcuts: Form Family Level

Common tasks can be performed quickly by assigning a combination of keyboard functions to each task.

An \* is displayed next to a command to indicate the associated shortcut combination was modified from the default combination at the system level. At the Form Family level, these shortcut combinations can be turned on or off as well for each form family but the key combinations cannot be modified.

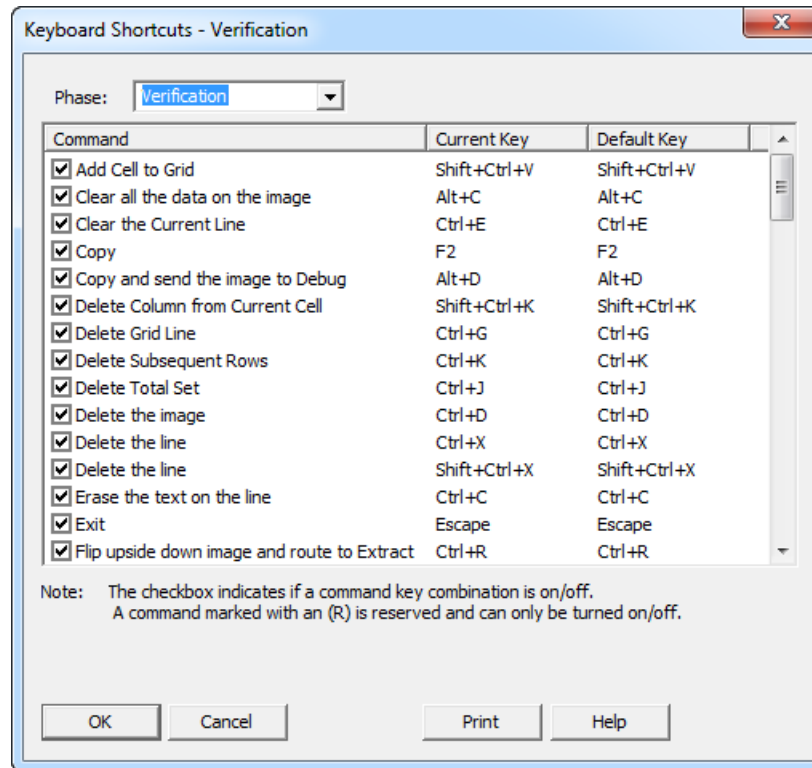
The list of assigned shortcuts can be printed.

**Steps**



**Access OCR for AnyDoc Form Family Management**

- 1 In the **Form Family Management** window, select the form family you want to modify and click **Keyboard Overrides**. The **Keyboard Shortcuts** window is displayed.

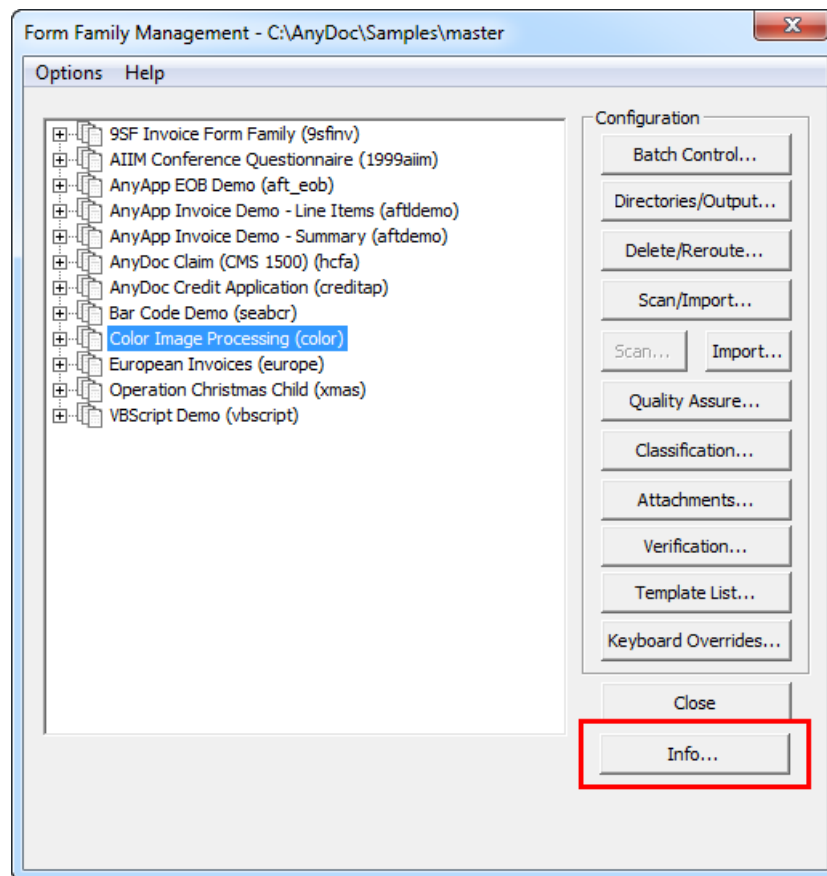


- 2 To activate the shortcut, select the check box for that command. The **Current Key** column displays the assigned shortcuts.
- 3 To print a list of all commands and the corresponding shortcuts, click **Print**.
- 4 Click **OK**.

**Access OCR for AnyDoc Form Family Management**

## View Related PDF File

If a PDF file is saved in the master path with the same name as the form family, the **Info** button is visible on the **Form Family Management** window. This provides direct access to the related PDF file from directly within OCR for AnyDoc.

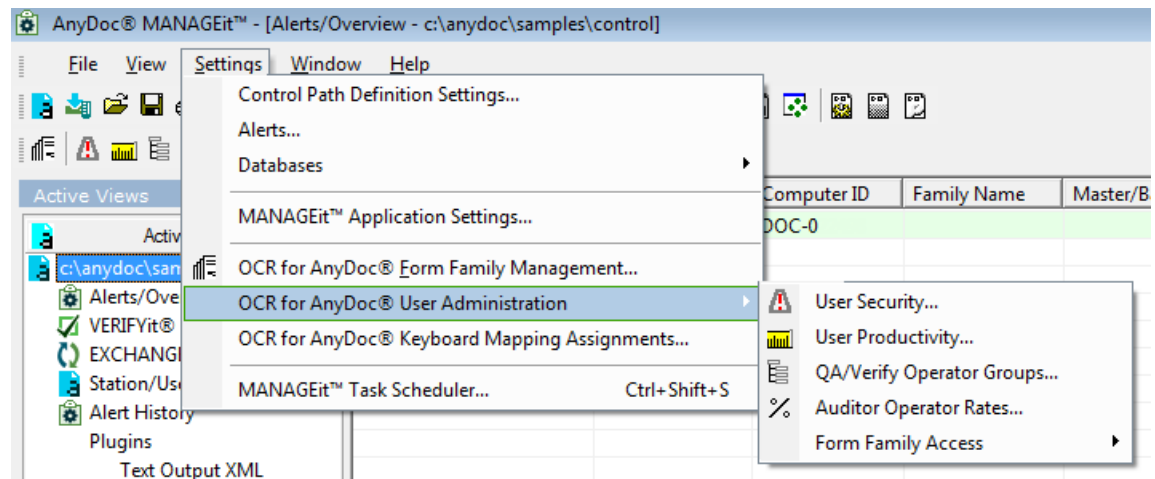


# Chapter 12

## OCR for AnyDoc User Administration

The OCR for AnyDoc User Administration menu provides access to several important OCR for AnyDoc functions.

To access the OCR for AnyDoc User Administration menu, select **Settings | OCR for AnyDoc® User Administration**.




### User Security

The User Security window provides the ability to define access permissions to specific functions and menus within OCR for AnyDoc and VERIFYit for each user and default settings that can be applied to new users when they are added.

#### Steps

- 1 Select **Settings | OCR for AnyDoc User Administration | User Security**  
OR

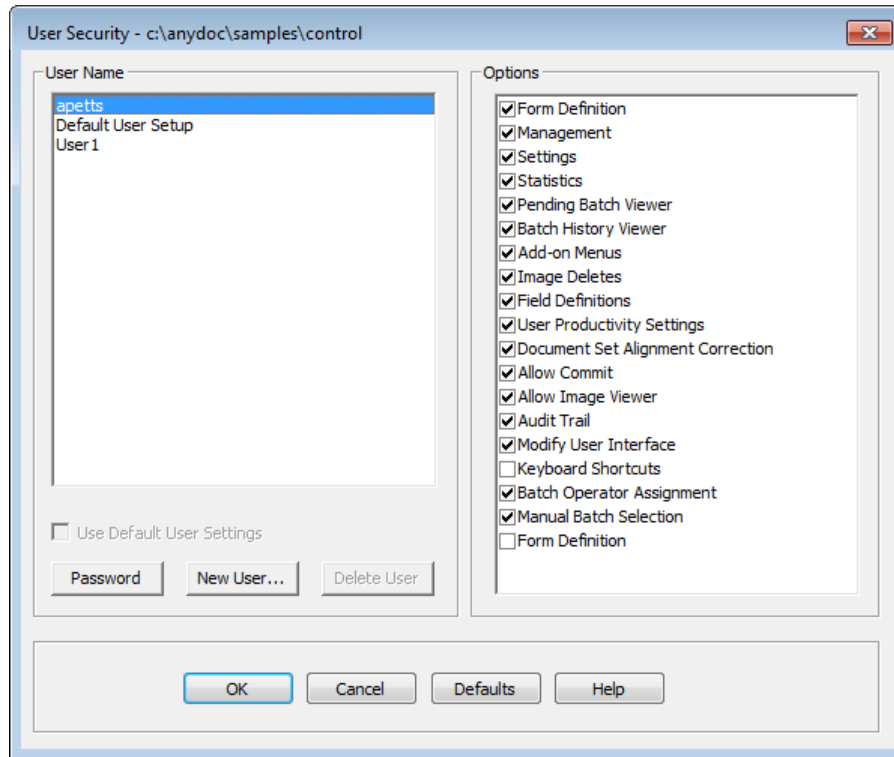
Click the **User Security** button,  on the Management toolbar.

OR

Right-click a user from the Station/User Activity window and select **Security**.

**OCR for AnyDoc User Administration**

The **User Security** window is displayed.

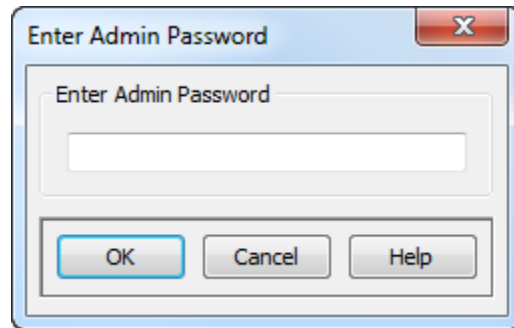


- 2 To modify a user's security options, select a user from the **User Name** field and enable or disable security check boxes in the **Options** section. Options include:
  - **Form Definition:** Allows creating and altering templates
  - **Management:** Allows access to the Management menu
  - **Image Deletes:** Allows the user to delete images during batch processing
  - **Batch History:** Allows access to the Batch History window
  - **User Productivity Settings:** Allows access to the User Productivity window
  - **Document Set Alignment Correction:** Ability to create or change document set alignment in the View Images window
  - **Field Definitions:** Allows the user to create, delete and edit field definitions
  - **Settings:** Allows access to the Settings menu.
  - **Batch Pending:** Allows access to the Batch Viewer window.
  - **Add-On Menus:** Allows access to any user defined add-on menus
  - **Statistics:** Allows access to the Statistics menu



Make sure that at least one user has access to all features.

- Click **Password**. The **Enter Admin Password** window is displayed.



- Enter the password into the **Enter Admin Password** field. The password can only be eight (8) characters in length.
- Click **OK**. You are prompted to reenter the admin password.
- Reenter the password into the **Reenter Admin Password** field and click **OK**. The password is saved and must be entered each time the User Security menu item is accessed.
- Click **New User** to create an additional user. The **Create New User** window is displayed.
- In the **User Name** field, enter the user's Windows or network user name.
- In the **Inherit Settings From** drop-down list, select either **Default User Setup** or another user's security profile. The new user inherits the selected security profile. This can be useful when adding new users who need the same security rights.
- Click **OK** to create the new user.
- After security has been set for all users, click **OK** to exit the **User Security** window.

## User Productivity


User Productivity is an administrative tool allowing productivity goals to be set for Verification operators by form family. Productivity goals can be measured by either images per hour or characters per hour. Once a productivity goal is set, it displays during Verification on the operator's station. Using color coding, this meter shows both the Verification operator and the administrator how the operator's actual performance compares to the goal.

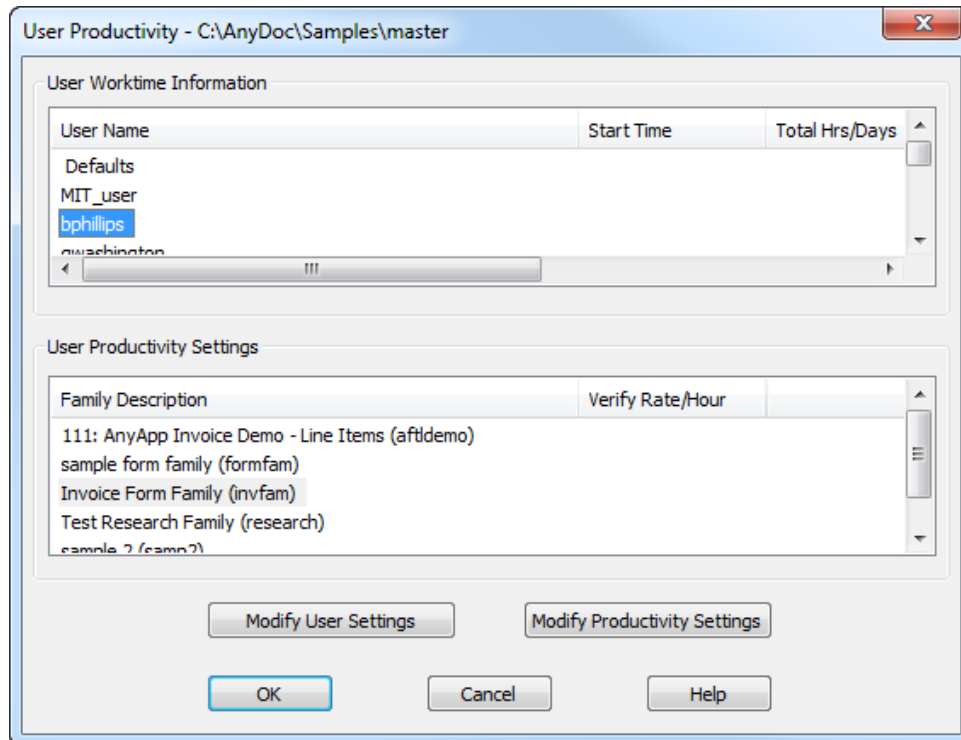
The Defaults user shown in the User Name field sets default productivity goals for form families. The default productivity goal is applied to any operator in Verification who does not have an individual productivity goal set for that form family.

### Steps

- Select **Settings | OCR for AnyDoc® User Administration | User Productivity**.  
OR

## OCR for AnyDoc User Administration

Click the **User Productivity** button,  on the Management toolbar.  
The **User Productivity** window is displayed.



The **User Productivity** window displays user worktime information and productivity settings. The title bar reads "User Productivity - C:\AnyDoc\Samples\master".

**User Worktime Information**

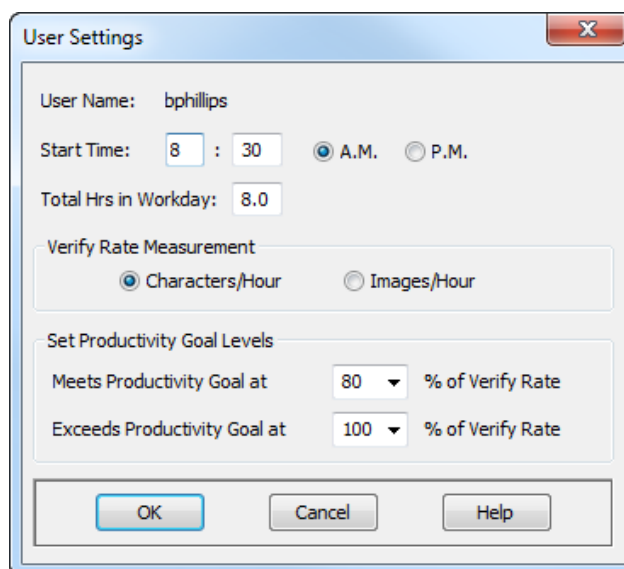
User Name	Start Time	Total Hrs/Days
Defaults		
MIT_user		
bphillips		
quashington		

**User Productivity Settings**

Family Description	Verify Rate/Hour
111: AnyApp Invoice Demo - Line Items (aftldemo)	
sample form family (formfam)	
Invoice Form Family (invfam)	
Test Research Family (research)	
sample 2 (camn2)	

Buttons: Modify User Settings, Modify Productivity Settings, OK, Cancel, Help.

- Select a user from the **User Name** field. The Family Description field displays all existing form families.
- Click the **Modify User Settings** button to set up user specific work time, verification rates and productivity goal levels. The User Settings window is displayed.



The **User Settings** window displays configuration for user "bphillips".

User Name: bphillips

Start Time: 8 : 30 ☒ A.M. ☐ P.M.

Total Hrs in Workday: 8.0

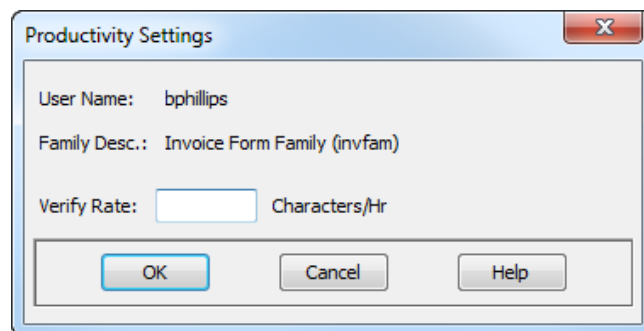
Verify Rate Measurement  
☒ Characters/Hour ☐ Images/Hour

Set Productivity Goal Levels

Meets Productivity Goal at	80	% of Verify Rate
Exceeds Productivity Goal at	100	% of Verify Rate

Buttons: OK, Cancel, Help.

- 4 Enter the user's **Start Time** in the fields provided.
- 5 Enable the **A.M.** or **P.M.** radio button to further define the start time as morning or evening.
- 6 Enter a number in the **Total Hrs in Workday** field.
- 7 Enable a radio button in the **Verify Rate Measurement** section to define how productivity is measured during Verification for this user. Options include:
  - **Characters/Hour:** The number of characters verified in one hour of work.
  - **Images/Hour:** The number of images verified in one hour of work.
- 8 Select a number from the **Meet Productivity Goal at** drop down list to set a target Verification rate for the selected user and form family. During Verification, a productivity meter is displayed on the screen showing the user's current rate as it compares to the goal.
- 9 Select a number from the **Exceeds Productivity Goal at** drop down list to display to set the exceptional Verification rate for the selected user and form family.
- 10 Click **OK**.
- 11 To modify the user's productivity settings click **Modify Productivity Settings**. The Productivity Settings window for the selected user and form family is displayed.



- 12 Enter a number in the **Verify Rate** field and click **OK**. The Verify Rate for the user is changed.
- 13 Click **OK**.

## QA/Verify Operator Group Management

Operator Groups are used for two purposes:

- To assign groups of users to form families to perform various processing phases
- To set audit rates for groups of users

From the Operator Group Management window you can:

- Add and delete OCR for AnyDoc users


**OCR for AnyDoc User Administration**

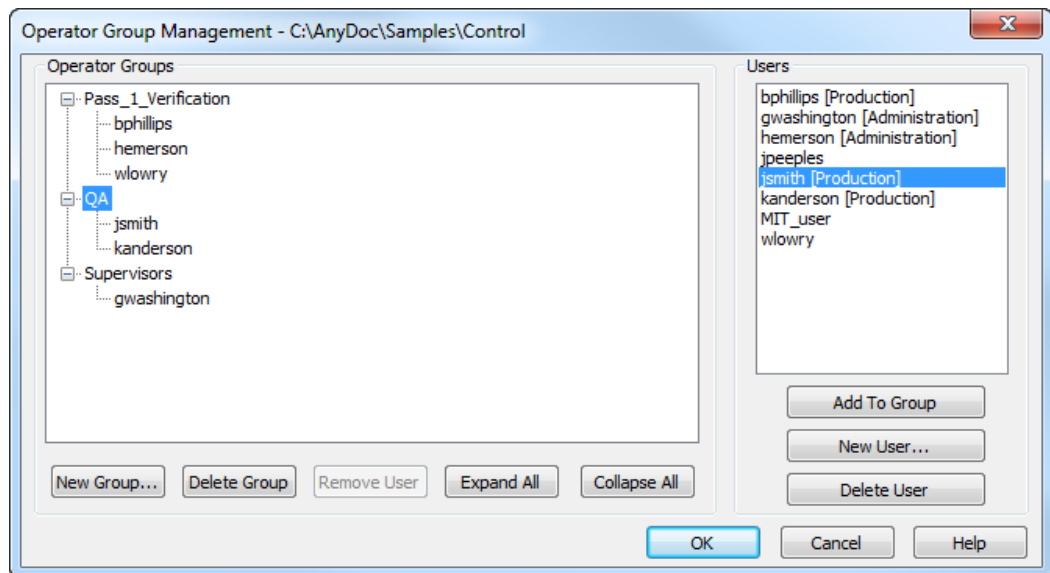
- Add and delete operator groups
- Add or remove users from operator groups

**Steps**

- 1 Select **Settings | OCR for AnyDoc® User Administration | QA/Verify Operator Groups**.

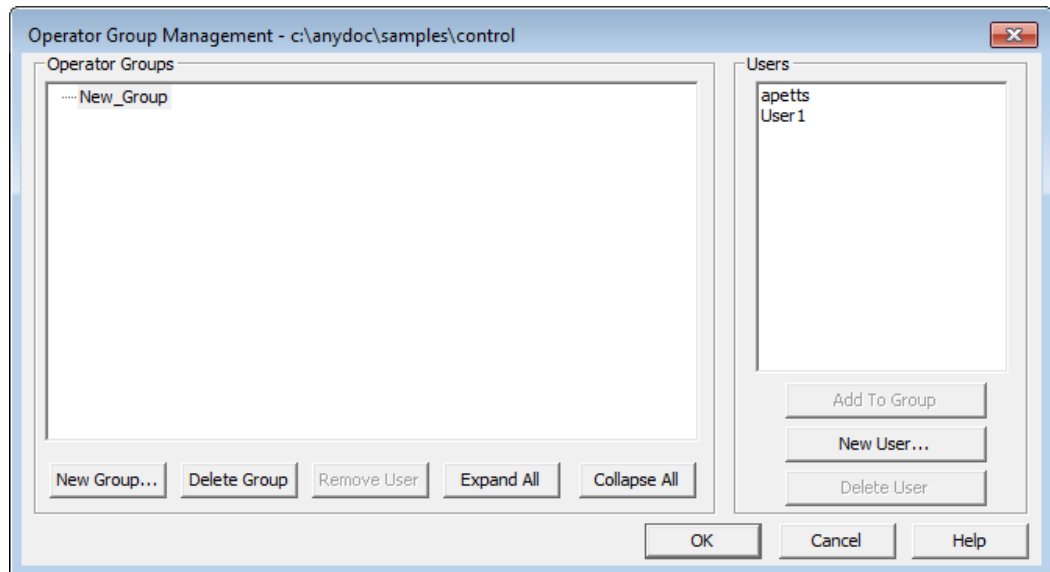
OR

Click the **QA/Verify Operator Groups** button,  on the Management toolbar. The **Operator Group Management** window is displayed.

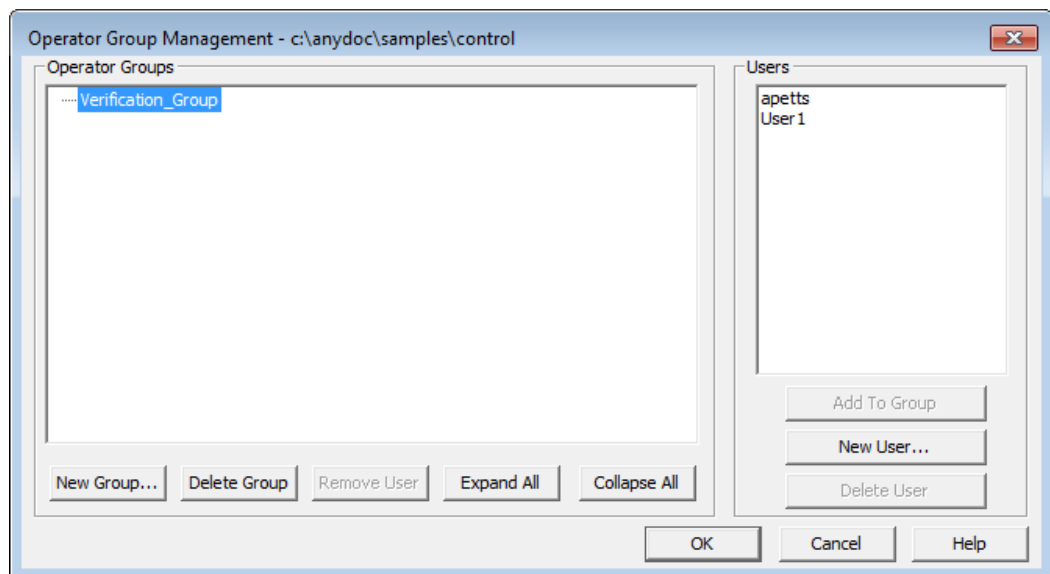




- Click **New Group** to add a new operator group. The words "New\_Group" appear in the Operator Groups field.




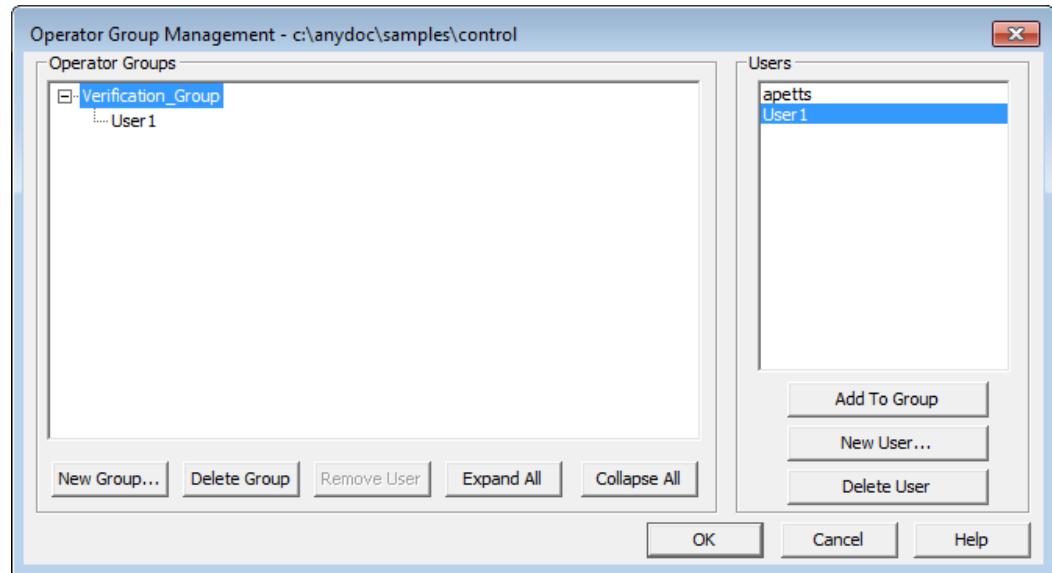
- Select the words **New\_Group** and type the name of the operator group to be created.



- To add a user to the operator group, select a user in the **Users** field and click **Add To Group**. The user's name is displayed below the group.

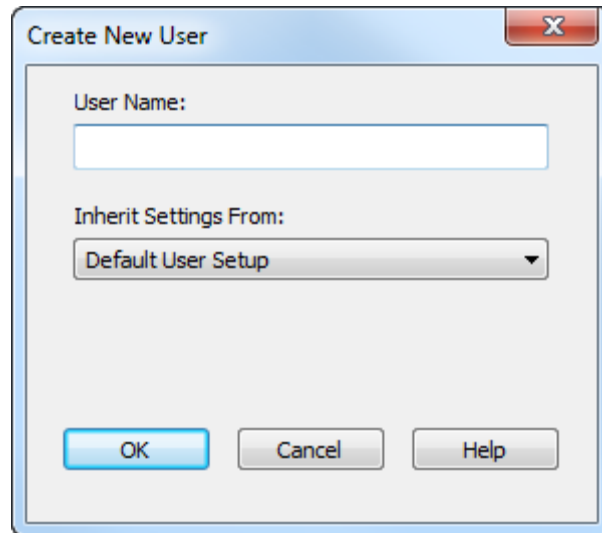
**OCR for AnyDoc User Administration**

 An Operator Group and User must both be highlighted to add a user to an operator group. If a user is highlighted in the Users field and a user is highlighted in the Operator Groups field, the user can not be added to the operator group.



- 5 To delete an operator group, click the **Delete Group** button. The group is deleted from the Operator Groups field.
- 6 To remove a user from a group, highlight the user in the **Operator Groups** field and click **Remove User**. The user is removed from the operator group.
- 7 To expand all operator groups to view the assigned users, click **Expand All**.
- 8 To collapse all operator groups and only view operator group names, click **Collapse All**.

- 9 Click the **New User** button to add a user to OCR for AnyDoc. The Create New User window is displayed.



- 10 Enter a **User Name**.
- 11 Select an option from the **Inherit Settings From** drop down list to set security settings that control which menu options and features the user can access. Options include:
  - Default User Setup
  - A specific user
- 12 Click **Delete User** to remove a user from OCR for AnyDoc. The user is also deleted from any Operator Groups or User Groups.

## Auditor Operator Rates

Audit rates can be set at the:


- User level
- Operator group level
- Form family level

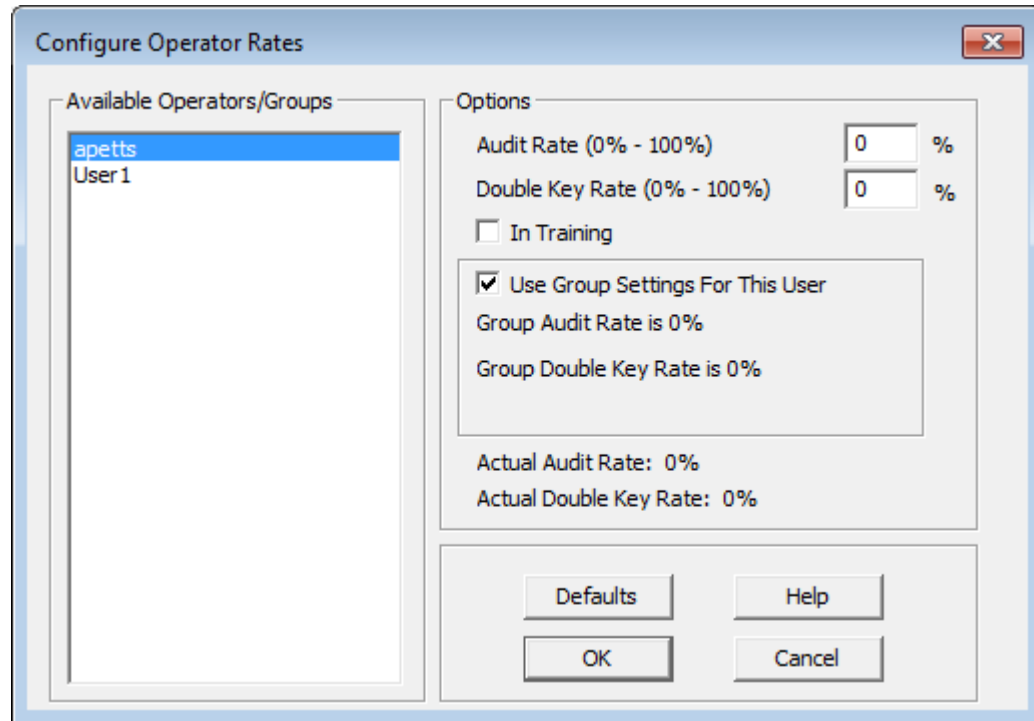
Set the audit rate at the form family level to set the same audit rate for all users in a form family. This option is used to set different rates for different users or operator groups when they are performing Verification on the same form family. If an audit rate is set at the form family level and an audit rate is also set at the user or operator group level, the two rates operate independently of one another. For example, if an audit rate of 10% is set for the form family and an audit rate of 10% is set at the operator group level 20% of the forms for that form family are audited.

**OCR for AnyDoc User Administration****Steps**

- 1 Select **Settings | OCR for AnyDoc® User Administration | Auditor Operator Rates**.

OR

Click the **Edit Audit Rates** button,  on the Management toolbar. The Configure Operator Rates window is displayed.



- 2 Select an **Available Operators/Group** from the list. Operator group names appear in square brackets. The controls in the Options section change depending on whether a user or operator group is selected in this field.
- 3 Enter a percentage for the **Audit Rate**.
- 4 Select the **In Training** check box if the user or operator group is currently attending a training class. This field is output to the audit log database for informational purposes.
- 5 Select the **Use Group Settings For This User** check box to use the group audit rate for this user. This setting only applies to users and not operator groups.
- 6 Click **OK**.

## Family Access Groups

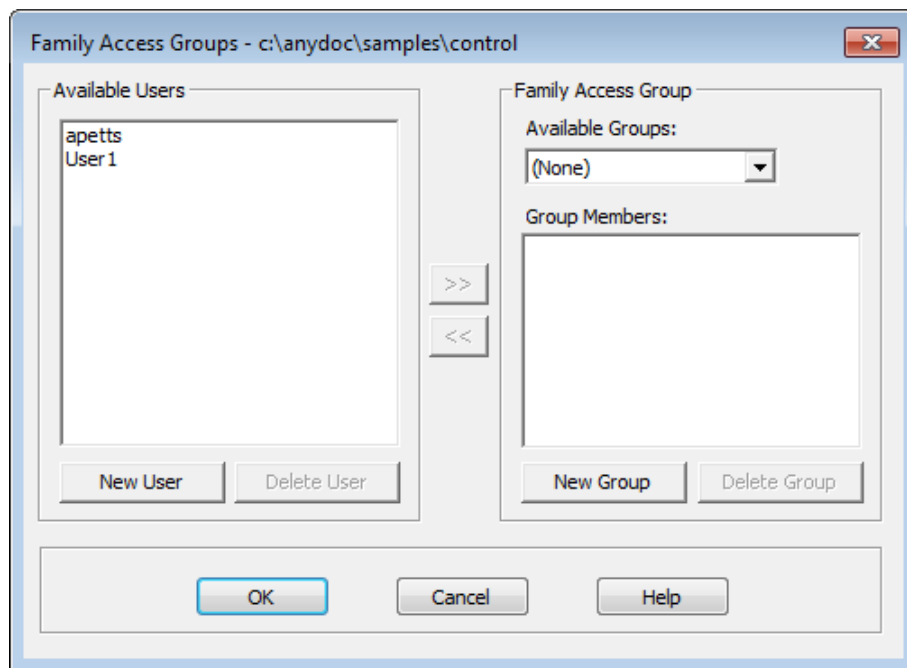
Form Family Access Overrides allows you to hide a form family from specific users and user groups in the Work Flow Manager. By hiding the form families users are unable to process any work for the form family. Other options allow you to:

- Disable AutoFlow for a form family when it is accessed by specific users and user groups
- Make a form family AutoFlow only for specific users and user groups
- Set an AutoFlow priority by form family for specific users and user groups

### Steps

- 1 Select **Settings | OCR for AnyDoc® User Administration | Form Family Access | Create Groups**.

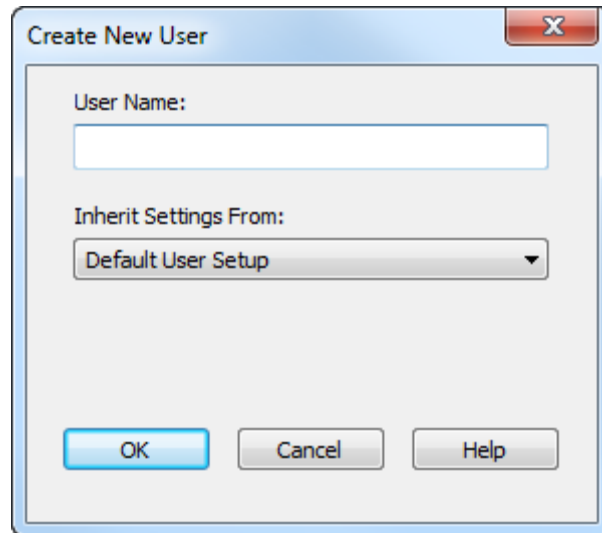
The **Family Access Groups** window is displayed.



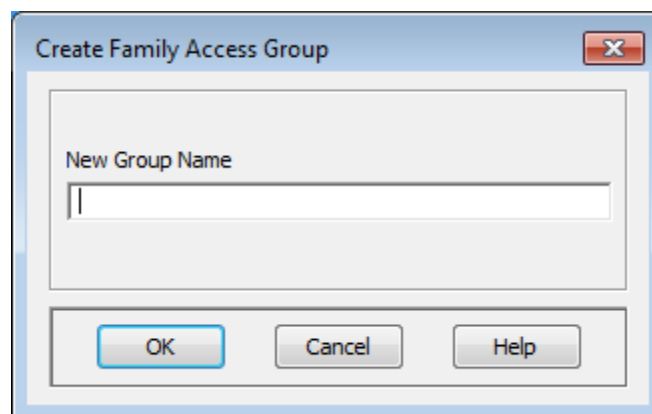
- 2 Select an **Available Group** from the drop down list to add the user to.
- 3 To add a user to a family access group, select a user from the **Available Users** drop down list and click the **Add** button. The user's name now appears in the Group Members field.
- 4 To delete a user from the family access group, select a user from the **Group Members** field and click the **Remove** button. The user's name is removed from the Group Members field.

**OCR for AnyDoc User Administration**

- 5 Click the **New User** button to add additional users. The Create New User window opens.



- 6 Enter a **User Name**.
- 7 Select a security profile from the **Inherit Settings From** drop down list. The new user inherits the selected security profile. This is useful when adding new users who need the same security rights.
- 8 To delete a user from the **Available Users** field, select the user's name and click the **Delete User** button. A message is displayed asking you to confirm the user's deletion.
- 9 To add a new group, click the **New Group** button. The Create Family Access Group window is displayed.



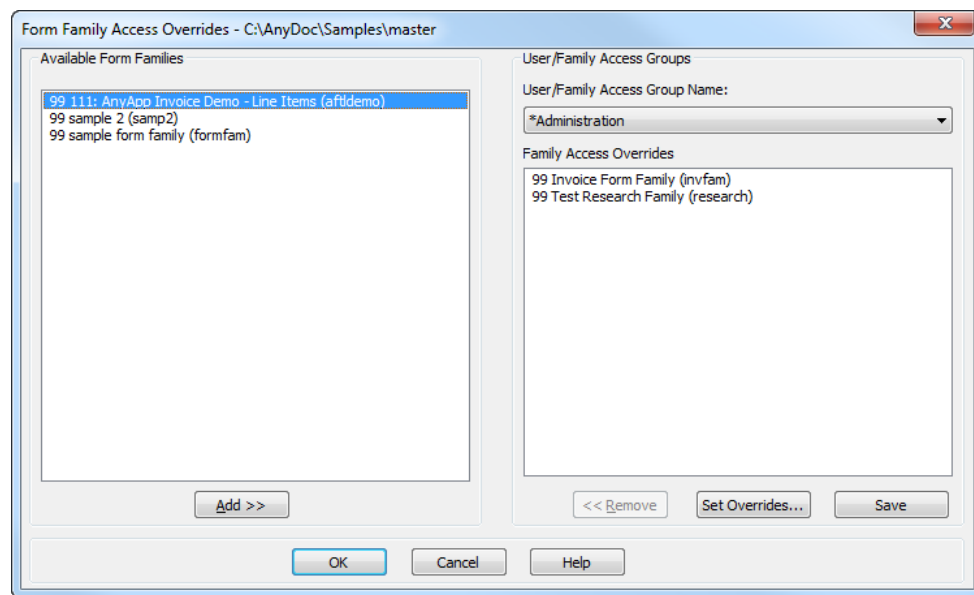
- 10 Enter the name of the new user group in the **New Group Name** field and click **OK**. The group is added to the Available Groups drop down list.

- 11 To delete a group, select the group from the **Available Groups** drop down list and click the **Delete Group** button. A message is displayed to confirm the group's deletion.

## Set Form Family Access Overrides

### Steps

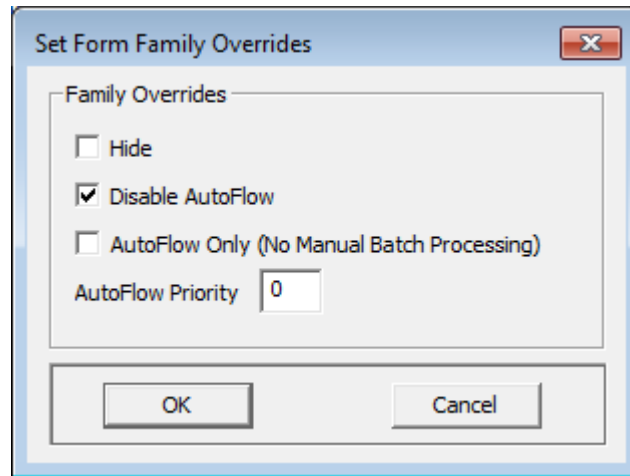
- 1 Select **Settings | OCR for AnyDoc® User Administration | Form Family Access | Set Overrides**. The **Form Family Access Overrides** window is displayed.



- 2 Select a **User** or **User Group Name** from the drop down list to configure form family access overrides.
- 3 Highlight the form family(s) in the **Available Form Families** field and click **Add**. The selected form family(s) is added to the Family Access Overrides field.

**OCR for AnyDoc User Administration**

- 4 Highlight the form family to configure from the **Family Access Overrides** field and click **Set Overrides**. The Set Form Family Overrides window is displayed.



- 5 To hide the selected form family from the user or user group appearing in the **User/UserGroup Name** drop down list, enable the **Hide** check box. The form family no longer appears in the **Workflow Manager** for the user or user group.
- 6 Enable the **Disable AutoFlow** check box to prevent AutoFlow from being used for the selected form family and user/user group.
- 7 Enable the **AutoFlow Only (No Manual Batch Processing)** check box to only allow AutoFlow for this form family with this user/user group. Batch processing is not allowed.
- 8 Enter a number in the **AutoFlow Priority** field to set the priority level for this form family when run by the selected user/user group.  
The entered number must be between 1 and 98, with 1 being the highest priority and 98 being the lowest priority. These priority levels are displayed next to the form family description in the Workflow Manager. Form families appear in order by priority level. Although it does not display in Workflow Manager, the default priority level for form families is 99. All form families with an AutoFlow Priority level assigned here are processed before form families with no AutoFlow Priority level assigned.
- 9 Click **OK**.
- 10 To remove a form family from the **Family Access Overrides** field, click **Remove**.
- 11 Click the **Save** button to save the changes to the user/user group.
- 12 Click **OK** to close the window.



# Appendix A

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## Log Database Schema

The log database is an optional tool that logs and maintains detailed information on batch processing. Use of the log database is enabled/disabled by form family. The data the log database provides can be useful in optimizing and troubleshooting the batch process. Whether or not the log database is maintained for a form family is set through Settings | OCR for AnyDoc® Form Family Management | Batch Control. See Configure Batch Control Parameters (page [261](#)).

Only batches Scanned/Imported after the log database is enabled for the form family are recorded in the log database. If the log database is disabled when a batch is Imported, that batch is not included in the log database, even if you enable the log database and restart the batch.

The log database records information for all processing that takes place, even if an image or an entire batch passes through the same phase more than once. For example, if an image in Verification is sent back to QA Review, then eventually passes through Verification a second time, each step is recorded.

The log database is only updated during two processing phases, Import and Commit. After a batch is Imported, information is accumulated about the batch as it passes through the various processing phases, then written to the log database when the batch is Committed or deleted.

The batch is not Committed or deleted if this data is not successfully added to the database. Restricting actual database updates to the Import and Commit phases allows you to restrict database access to those workstations and improves performance for all other phases. It also simplifies support for remote Verification stations.

The default Microsoft® Access log database resides in the OCR for AnyDoc Control directory. The file name is AnyDocLogDB.mdb.

The tables in the log database are:

ADBATCH	Contains one record per batch representing all processing from the time the batch is created (via Import or resubmit) through Commit. If a batch is resubmitted a new batch record is created with the same batch number but a new resubmit count. See ADBATCH Table (page <a href="#">409</a> ).
ADImage	Contains one record per image linked to the associated batch record via a foreign key, causing all linked image records to be deleted when the batch record is deleted. This record contains data associated with the creation of the image (how, when, by whom) and the final disposition of the image (deleted, routed, or committed), as well as general information such as the template ID. It is created by the Import phase and updated with final

**Log Database Schema**

	values at the Commit phase. See ADImage Table (page <a href="#">412</a> ).
ADProcess	Contains one record for each instance of processing performed on an image. It is linked to the image record via a foreign key, causing all linked records to be deleted when the image record is deleted. It includes a processing sequence number to insure that the order of processing can be properly determined. These records (as well as the records for all phase tables) are created at the Commit phase from data stored in the DBData.dat file. See ADProcess Table (page <a href="#">414</a> ).
ADQA	For future implementation. Will contain one record for each time the batch is processed in Quality Assurance. Note that AnyApp can send a batch back to QA to validate document sets set by a doc set controller. Linked to the batch record as well as the process record for the first image.
ADRescan	For future implementation. To contain one record for each image processed in the QA Rescan phase. Linked to the process record.
ADReview	For future implementation. To contain one record for each image processed in the QA Review phase. Linked to the process record.
ADID	Contains one record for each image processed at the Identification phase. Linked to the process record. See ADID Table (page <a href="#">415</a> ).
ADException	For future implementation. To contain one record for each image processed in the Exceptions phase. Linked to the process record.
ADExtract	Contains one record for each image processed in the Extraction phase. Linked to the process record. See ADExtract Table (page <a href="#">416</a> ).
ADHSV	For future implementation. To contain one record for each image processed in the High Speed Verification phase. Linked to the process record.
ADValidate	For future implementation. To contain one record for each image processed in the Rules Validation phase. Linked to the process record.
ADVerify	Contains one record for each image processed in the Pass 1, Pass 2, or Supervisor Verification phase. Linked to the process record. See ADVerify Table (page <a href="#">416</a> ).
ADAudit	For future implementation. To contain one record for each image processed in the Audit phase (currently right after Supervisor Verification). Linked to the process record.
ADTotalSets	For future implementation. To contain one record for each time the batch is processed in the Total-Sets Balancing phase. Linked to the batch record as well as the process record for the first image. Each image which has modified data is sent back to Rules Validation, so Balancing data associated with an image should be

	processed and posted there.
ADBalance	For future implementation. To contain one record for each time the batch is processed in the Balancing Verification phase (includes document set balancing as well). Linked to the batch record as well as the process record for the first image. Each image which has modified data is sent back to Rules Validation, so Balancing data associated with an image should be processed and posted there.
XPhase	Translation table for phase values.
XOrigin	Translation table for batch origin values.
XIDType	Translation table for Identification method values.
XRegType	Translation table for registration method values.

## ADBatch Table

The ADBatch table contains one record per batch representing all processing from the time the batch is created (via import or resubmit) through Commit. If a batch is resubmitted a new batch record is created with the same batch number but a new resubmit count. After a batch is Committed or deleted, no new data is associated with that batch record. The batch record is created by the Import phase and updated with final values at the Commit phase.

When this table is deleted, all associated records, such as the image/process/phase records are automatically deleted with it. To delete old data from the log database use the commit date to delete batch records committed over a specified number of days. If a batch has not been committed then the commit date will be NULL and the CommittedBy field will be blank. This automatic deletion of linked records simplifies the deletion process; simply determine the criteria for when old batches should be deleted and then delete those batch records from the ADBatch table.

Field	Description
BatchID	A unique sequential number assigned by the system. This is used as the primary key to uniquely identify the batch and to link records from other tables. When a batch is resubmitted after Commit (or reimported with the same batch number), a new log database record is created with a new batch ID. When a batch is restarted, it is not assigned a new batch ID. This ID is saved in a file in the batch directory to provide rapid access to the batch record. Never changed.
FamilyName	The form family file name.
BatchNumber	The eight-digit system assigned batch number.
ResubmitCount	The number of times this batch has been resubmitted. A new log database record is created each time a batch is resubmitted. This allows

**Log Database Schema**

<b>Field</b>	<b>Description</b>
	a batch record to be associated only with processing done from the time the batch was created to the time it was Committed. A resubmit is a new "creation" of the batch.
RestartCount	The number of times the batch has been restarted.
ImageCount	The number of images in the batch. This number may increase if new images are added via Rescan or Review. The number never decreases, because images are never removed from the count. They may be flagged as deleted or rerouted. Deleted and rerouted flags are removed if the batch is restarted.
DocSetCount	The number of document sets in the batch. If document sets are determined at Scan/Import, this value is set when the batch is created. It is always updated at Commit with the final number of document sets.
Created	The batch creation date/time. This can be used as a key to find batches created within a specified interval. Never changed.
CreatedBy	The Import operator who created the batch (regardless of the source of the batch). Never changed.
ScannedBy	The operator who scanned the batch. Never changed.
Committed	The batch Commit/delete/reroute date/time. This can be used as a key to find batches committed within a specified interval. Only set once.
CommittedBy	The operator who Committed/deleted/rerouted the batch. Only set once.
Phase	The current state of the batch: 0 Active 100 Deleted 101 Rerouted 102 Committed
Deleted	The date and time the batch was deleted. Only set once.
DeletedBy	The operator who deleted the batch. Only set once.
DeletePhase	The phase during which the batch was deleted or rerouted. Only set once.
DeleteReason	The reason given by the user for deleting or rerouting the batch, if applicable. Only set once.
ControlNumber	The user defined batch control number. May be used as a non-unique key to locate batches by control number. May be blank. Never changes.
BatchTotal	If a batch balancing equation is used for the form family, this is the batch total.
TotalChars	The number of characters extracted in all passes through the Extraction phase.

Field	Description
TotalQuestionable	The number of characters flagged as questionable.
TotalKeystrokes	The number of Verification keystrokes in all Verification phases.
TotalCorrected	The number of questionable characters corrected by Verification operators.
TotalOther	The number of characters corrected by Verification operators that were not flagged as questionable.
TotalDbIKeystrokes	The number of keystrokes during double-key Verification after the first entry.
TotalDbIRows	The number of rows (Verification lines) submitted for double-key Verification.
TotalNotes	The number of supervisor Sticky Notes attached in all phases.
QA	The number of times the batch was processed via any of the QA phases. This includes QA, Review, and Rescan.
TotalExtracted	The number of images to which data Extraction was applied. This does not include Attachments, since no data is extracted from those images. This number includes multiple passes on the same image if an image was sent back to Extraction or to an earlier phase.
TotalVerified	The number of images submitted to Verification operators for processing. This does not include images that are assigned but are then skipped because no processing is required. For example, the Advance to first questionable option is turned on and there are no questionable characters on the image.
TotalAttachments	The number of images that were flagged as attachments when the batch was Committed.
TotalDeleted	The number of images flagged as deleted when the batch was Committed, deleted, or rerouted.
TotalRouted	For future implementation. The number of images flagged as rerouted when the batch was Committed, deleted, or rerouted.
TotalBypassVerify	The number of images that bypassed Verification.
TotalNotRegistered	The number of images that failed registration during Extraction. This only includes the last registration attempted for an image, not any previous failed attempts for images later flagged as attachments.
TotalSetCount	For an AnyApp batch using EOB total sets, this is the number of total sets, in the batch.
LineItemCount	For an AnyApp batch using detail grids, this is the number of line items in the batch.
SourceBatch	Indicates all images in this batch were rerouted from the specified source batch.

## ADImage Table

The ADImage table contains one record per image linked to the associated batch record via a foreign key, causing all linked image records to be deleted when the batch record is deleted. This record contains data associated with the creation of the image (how, when, by whom) and the final disposition of the image (deleted, routed, or committed), as well as general information such as the template ID. It is created by the Import phase and updated with final values at the Commit phase.

Field	Description
ImageID	A unique sequential number assigned by the system. This is used as the primary key to uniquely classify the image and to link records from other tables. This ID is saved in a file in the batch directory to provide rapid access to the image record. Never changed.
BatchID	Foreign key to ADBatch table. This is used as a key to locate images associated with a batch. Never changed.
Sequence	The current image sequence number within the batch. This is included with BatchID in a key to locate a specific image in a batch. This number may change if images are reordered.
OrigSequence	The image's original sequence number within the batch when it was Imported or appended. Never changed.
Created	The image creation date/time. This is the creation date/time of the file. It represents the scan time for scanned images, the reception time for faxed images, or the creation time for image files created by other means. Never changed.
CreatedBy	The operator who created the image. For images scanned by OCR for AnyDoc, it is the Scan station operator. Otherwise, it is the Import operator. For images appended to the batch after Import, such as in Quality Assurance, it is the operator who appended the image. Never changed.
Imprinter	The imprinter string. Never changed.
ImportName	The original name of the imported image file before Import with the full path. Never changed.
ImportPageNum	The page number within a multipage Import image file, or 0 if it was a single page image file. Never changed.
Phase	For future implementation. The image's current processing phase.
OutputName	The output image file name at Commit with the full path.
PageNumber	The page number of the image within a multipage image output file, or 0 if it was a single page image file. Only set once.

Field	Description
TextName	The output text file name with the full path. Only set once.
Template	The name of the template to which the image was identified ("attachmnt" if an Attachment). Does not include the .FRF extension.
IDMethod	The method used to classify the template, such as ID Phase or ID Exceptions. The XIDType table provides the translation of these numbers into text descriptions.
Origin	The origin of the image. For example, Scanner, Import, Fax, Resubmit, or Insert. The XOrigin table provides the translation of these numbers into text descriptions.
Attachment	Indicates if the image is an attachment. The value is one if the image is an attachment. Otherwise it is zero.
Verified	Indicates the number of times the image has been Verified.
Deleted	Indicates if the image has been deleted. The value is one if the image has been deleted. Otherwise it is zero.
Routed	Indicates if the image has been rerouted. The value is one if the image has been rerouted. Otherwise it is zero.
DeleteTime	For deleted images, the date/time the image was deleted.
DeletedBy	The operator who deleted or rerouted the image.
DeletePhase	The phase during which the image was deleted.
DeleteReason	The reason the user gave for deleting or rerouting the image.
RouteFamily	If the image was rerouted, this indicates the form family the image was rerouted to.
RouteBatch	If the image was rerouted, this indicates the batch the image was rerouted to.
RoutePhase	If the image was rerouted, this indicates the phase the image was rerouted from.
SourceSequence	For a image created by rerouting images from another batch, this indicates the original image sequence number from the source batch.

## ADProcess Table

The ADProcess table contains one record for each instance of processing performed on an image. It is linked to the image record via a foreign key, causing all linked records to be deleted when the image record is deleted. It includes a processing sequence number to insure that the order of processing can be properly determined. Using the date/time field is unreliable, since the date/time on a station may be incorrect, especially for remote Verifiers.

These records (as well as the records for all phase tables) are created at the Commit phase from data stored in the DBData.dat file.

Field	Description																										
ImageID	A foreign key to the Image table. The unique ImageId of the image on which these processes were performed. This can be used as part of a primary key to find process records associated with an image. Never changed.																										
ProcSeq	The process sequence number. This number insures that records are sorted in the actual processing sequence. It is used as part of the primary key.																										
Phase	<p>The processing phase. For example, Classify, Extract, or Verify. The Log Database Viewer displays the phase name. The log database file displays a number that corresponds to the phase.</p> <table> <tr><td>0</td><td>= None</td></tr> <tr><td>1</td><td>= QA</td></tr> <tr><td>4</td><td>= Classify</td></tr> <tr><td>5</td><td>= ID Exception</td></tr> <tr><td>6</td><td>= Extract</td></tr> <tr><td>7</td><td>= High Speed Verify</td></tr> <tr><td>9</td><td>= Verify</td></tr> <tr><td>10</td><td>= Pass2 Verify</td></tr> <tr><td>11</td><td>= Supervisor Verify</td></tr> <tr><td>15</td><td>= Batch Balancing</td></tr> <tr><td>16</td><td>= Commit</td></tr> <tr><td>17</td><td>= Deleted</td></tr> <tr><td>18</td><td>= Routed</td></tr> </table>	0	= None	1	= QA	4	= Classify	5	= ID Exception	6	= Extract	7	= High Speed Verify	9	= Verify	10	= Pass2 Verify	11	= Supervisor Verify	15	= Batch Balancing	16	= Commit	17	= Deleted	18	= Routed
0	= None																										
1	= QA																										
4	= Classify																										
5	= ID Exception																										
6	= Extract																										
7	= High Speed Verify																										
9	= Verify																										
10	= Pass2 Verify																										
11	= Supervisor Verify																										
15	= Batch Balancing																										
16	= Commit																										
17	= Deleted																										
18	= Routed																										
NextPhase	<p>The processing phase the image will be sent to at the end of the current phase. For example, Classify, Extract, or Verify. The Log Database Viewer displays the phase name. The log database file displays a number that corresponds to the following phases:</p> <table> <tr><td>0</td><td>= None</td></tr> <tr><td>1</td><td>= QA</td></tr> <tr><td>4</td><td>= Classify</td></tr> <tr><td>5</td><td>= ID Exception</td></tr> <tr><td>6</td><td>= Extract</td></tr> </table>	0	= None	1	= QA	4	= Classify	5	= ID Exception	6	= Extract																
0	= None																										
1	= QA																										
4	= Classify																										
5	= ID Exception																										
6	= Extract																										



Field	Description
	7 = High Speed Verify
	9 = Verify
	10 = Pass2 Verify
	11 = Supervisor Verify
	15 = Batch Balancing
	16 = Commit
	17 = Deleted
	18 = Routed
Operator	The operator who processed the image in this phase.
StartTime	The date and time at which the phase started processing the image.
EndTime	The date and time at which the phase finished processing the image.
TotalTime	The total processing time in the phase, in hundredths of a second (.01 seconds).
ComputerId	The name of the computer that processed the image in this phase.

## ADID Table

The ADID table contains one record for each image processed at the Classification phase. Linked to the process record.

Field	Description
ImageID	The unique ImageId of the image on which the process was performed. This can be used as part of a primary key to find process records associated with an image.
ProcSeq	The process sequence number. This number is used as part of the primary key.
IDType	The method used to classify the image. For example, Auto ID, ID Default, or ID Attachment. The XIDType table provides the translation of these numbers into text descriptions.
Attempts	The number of attempts needed to classify the image.
Literal	The literal used to classify the image, if applicable.
Template	The template to which the image was classified, if successful.

## ADExtract Table

The ADExtract table contains one record for each image processed at the Extraction phase. Linked to the process record.

Field	Description
ImageId	The unique ImageId of the image on which the process was performed.
ProcSeq	The system assigned process sequence number.
BypassVerify	One if the image bypassed Verification, otherwise, zero.
TotalChars	The total number of characters extracted from the image.
TotalQuestionable	The total number of questionable characters extracted from the image.
RegStat	Whether or not the image passed registration. The Log Database Viewer displays the value. The log database file displays a number that corresponds to the value.  0 = Registered 1 = Not Registered 2 = Cannot Register
Rotation	The number of degrees the image was rotated during registration.
XScale	The horizontal image size as a percent of the template size.
YScale	The vertical image size as a percent of the template size.
XTranslate	The number of pixels the image was shifted horizontally to match the template during registration.
YTranslate	The number of pixels the image was shifted vertically to match the template during registration.
RegPt1, RegPt2 ... RegPt6	These fields list the Registration points found and the order in which they were found. The value is one if it was found, zero if it was not found.
Enhancement	If image enhancement was used, shows the level.
TotalNotes	The number of supervisor Sticky Notes attached to the image.

## ADVerify Table

The ADVerify table contains one record for each image processed in the Pass 1, Pass 2, or Supervisor Verification phase. Linked to the process record.

Field	Description
ImageID	The unique ImageId of the image on which the process was performed. This can be used as part of a primary key to find process records

Field	Description
	associated with an image.
ProcSeq	The process sequence number. This number is used as part of the primary key.
TotalChars	The total number of characters presented to the Verifier. This only includes what actually appears in Verification. For example, hidden zones are not included.
TotalQuestionable	The total number of questionable characters presented to the Verifier. This only includes what actually appears in Verification. For example, hidden zones are not included.
Keystrokes	The number of keystrokes made by Verification operators on the image.
Corrected	The number of questionable characters corrected during Verification.
Other	The number of characters changed during Verification that were not questionable.
DblKeys	The number of keystrokes during double-key Verification, after the first entry.
DblRows	The number of rows (Verification lines) submitted for double-key Verification.
Notes	The number of supervisor sticky notes attached to the image.

# Appendix B

---

## MANAGEit Plugins

MANAGEit allows the use of plugins to enhance its capabilities. Plugins can perform many functions including capture events and provide responses if needed, respond to triggered alerts, or family information changes. Notification of these events can be sent via e-mail, Instant Messenger (IM), or custom login.

### Create a Plugin

MANAGEit plugins are DLL files that export functions MANAGEit can load and call. MANAGEitApi.h must be included in each project and all definition files used to interface with MANAGEit. This file is stored in **C:\Program Files\Hyland\MANAGEit\CodeSamp** (32-bit environment) or **C:\Program Files (x86)\Hyland\MANAGEit\CodeSamp** (64-bit environment).

To create a MANAGEit plugin, create a DLL file that exports the following functions:

- `int API_Initialize(API_InitBlock* pBlock);`
- `void API_GetInformation(API_InformationBlock* pBlock)`

**API\_InitBlock** and **API\_InformationBlock** are both defined in MANAGEitApi.h. These functions are required for use as a plugin. Any other functions can be declared if they are needed.

When the DLL is created, it must be placed in "C:\ProgramData\AnyDoc\MANAGEit\Plugins". MANAGEit will only look in this folder for available plugins.

### Event Handling

To handle an event passed from MANAGEit, function to handle the event must be declared first. Following is a list of possible events and their corresponding functions:

- An alert is triggered by MANAGEit  
`void API_OnAlert(API_AlertInfo* pAlert)`
- An alert is no longer in a triggered state  
`void API_OnAlertRemoved(API_AlertInfo* pAlert)`
- MANAGEit has refreshed, either because the user requested it or the refresh timer has elapsed  
`void API_OnRefresh(void)`

- A station was refreshed and its status has changed  
**void API\_OnRefreshStation(API\_StationInfo\* pStation)**
- A family was refreshed and its status has changed  
**void OnRefreshFamily(API\_FamilyInfo\* pFamily)**

If any of these functions are not defined, MANAGEit ignores the plugin for the given event.

Events are called synchronously. MANAGEit waits for the event to finish processing before it continues with its own processing.



These functions must be exported from the DLL. This can be done using a DEF file or by using the Visual C++ `__declspec(dllexport)` type.

## Obtain Information from MANAGEit

The MANAGEit plugin API allows other plugins to get information from MANAGEit. These functions are passed in through the `API_InitBlock` in `API_Initialize`. Since the `API_InitBlock` is only valid as long as `API_Initialize` is running, a copy of `API_InitBlock` should be created. For example

```
API_InitBlock PluginCalls;
```

```
...
```

```
memcpy(&PluginCalls, pBlock, sizeof(API_InitBlock));
```

With a copy of the `API_InitBlock`, you can make calls to MANAGEit using any of the available functions. The first parameter of every function is the plugin's handle. This is the `hPlugin` parameter of the `API_InitBlock` object passed to `API_Initialize`. All of these functions require a callback function. This is a function you create, but it does not need to be exported from the DLL to be used. The last parameter for these functions is a `void*`. This can be any value and is passed to the callback function without being modified. This allows you to pass any information to the callback functions.

## MANAGEit Enumerators

MANAGEit's enumerators accept a callback function, that is called once for each enumerated item. This is called once for each item until the last one is complete or until the callback function cancels it.

**MANAGEit Plugins**

Each time a callback function is called, it must return `_ENUM_NEXT` or `_ENUM_CANCEL`. If `_ENUM_NEXT` is passed, then the next item is retrieved and the callback function is called again with it. If `_ENUM_CANCEL` is returned, then the enumerator ends and returns control to the plugin.

## EnumerateAlerts

```
int EnumerateAlerts(PLUGIN_HANDLE hPlugin, int (*Callback)(API_AlertInfo*  
pAlert, void* pInfo), void* pInfo)
```

- **PLUGIN\_HANDLE hPlugin:** The handle passed to `API_Initialize`
- **int (\*Callback)(API\_AlertInfo\* pAlert, void\* pInfo):** The callback function to be called by the enumerator
- **void\* pInfo:** Information passed to the callback function by the enumerator

This function is called to get a list of all alerts currently triggered in the system. The callback function is called once for each alert, until there are no more alerts or the callback function stops the enumeration.

### Callback Function Sample

```
int EnumerateAlertsCallback(API_AlertInfo* pAlert, void* pInfo)  
{  
    return _ENUM_NEXT;  
}
```

## EnumerateStations

- `int EnumerateStations(PLUGIN_HANDLE hPlugin, int (*Callback)(API_StationInfo* pStation, void* pInfo), void* pInfo)`  
**PLUGIN\_HANDLE hPlugin:** The handle passed to `API_Initialize`
- **int (\*Callback)(API\_StationInfo\* pAlert, void\* pInfo):** The callback function to be called by the enumerator
- **void\* pInfo:** Information passed to the callback function by the enumerator

This function is called to get a list of all stations currently not filtered by MANAGEit. The callback function is called once for each station, until there are no more stations or the callback function stops the enumeration.

### Callback Function Sample

```
int EnumerateStationsCallback(API_StationInfo* pStation, void* pInfo)  
{  
    return _ENUM_NEXT;  
}
```

```
}
```

## EnumerateFamilies

```
int EnumerateFamilies(PLUGIN_HANDLE hPlugin, int (*Callback)(API_FamilyInfo*
pFamily, void* pInfo), void* pInfo)
```

- **PLUGIN\_HANDLE hPlugin:** The handle passed to API\_Initialize
- **int (\*Callback)(API\_FamilyInfo\* pFamily, void\* pInfo):** The callback function to be called by the enumerator
- **void\* pInfo:** Information passed to the callback function by the enumerator

This function is called to retrieve a list of all form families, including those form families that are hidden due to no pending work. The callback function is called once for each form family, until there are no more form families or the callback function stops the enumeration.

### Callback Function Sample

```
int EnumerateFamiliesCallback(API_FamilyInfo* pFamily, void* pInfo)
{
    return _ENUM_NEXT;
}
```

## EnumerateFamilyBatches

```
int EnumerateFamilyBatches(PLUGIN_HANDLE hPlugin, char* sFamily, int
(*Callback)(API_BatchInfo* pBatch, void* pInfo), void* pInfo)
```

- **PLUGIN\_HANDLE hPlugin:** The handle passed to API\_Initialize
- **char\* sFamily:** The name of the family file containing batches. This can be retrieved from a call to EnumerateFamilies or from responding to OnRefreshFamily as the sName member of the API\_FamilyInfo object.
- **int (\*Callback)(API\_BatchInfo\* pBatch, void\* pInfo):** The callback function to be called by the enumerator
- **void\* pInfo:** Information passed to the callback function by the enumerator

This function is called to get a list of all batches in the specified family. The callback function is called once for each family, until there are no more families or the callback function stops the enumeration.

### Callback Function Sample

```
int EnumerateFamilyBatchesCallback(API_BatchInfo* pBatch, void* pInfo)
```

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```

{
    return _ENUM_NEXT;
}

```

## EnumerateBatches

```
int EnumerateBatches(PLUGIN_HANDLE hPlugin, int (*Callback)(API_BatchInfo*
pBatch, void* pInfo), void* pInfo)
```

- **PLUGIN\_HANDLE hPlugin:** The handle passed to API\_Initialize
- **int (\*Callback)(API\_BatchInfo\* pBatch, void\* pInfo):** The callback function to be called by the enumerator
- **void\* pInfo:** Information passed to the callback function by the enumerator

This function is called to retrieve a list of all batches in the system. The callback function is called once for each form family, until there are no more form families or the callback function stops the enumeration.

### Callback Function Sample

```
int EnumerateBatchesCallback(API_BatchInfo* pBatch, void* pInfo)
{
    return _ENUM_NEXT;
}

```

## Data Structures

### API\_InitBlock

```
struct API_InitBlock
{
    PLUGIN_HANDLE hPlugin;
    int (*EnumerateAlerts)(PLUGIN_HANDLE hPlugin, dEnumerateAlertsCallback,
void* pInfo);
    int (*EnumerateStations)(PLUGIN_HANDLE hPlugin,
dEnumerateStationsCallback, void* pInfo);
    int (*EnumerateFamilies)(PLUGIN_HANDLE hPlugin,
dEnumerateFamiliesCallback, void* pInfo);
    int (*EnumerateFamilyBatches)(PLUGIN_HANDLE hPlugin, char const* sFamily,
dEnumerateBatchesCallback, void* pInfo);
}

```



```
int (*EnumerateBatches)(PLUGIN_HANDLE hPlugin,  
    dEnumerateBatchesCallback, void* pInfo);  
int (*LogEntry)(PLUGIN_HANDLE hPlugin, char const* sLogEntry);  
};
```

### Remarks

This structure contains information for communicating with MANAGEit and is passed in through the API\_Initialize function. To use the this information, create a copy by declaring a variable of type API\_InitBlock and using memcpy to copy the data in it.

### Members

**hPlugin:** This function contains the plugin handle, and should be used in all calls to MANAGEit functions.

**EnumerateAlerts:** This function is used to enumerate the alerts. See EnumerateAlerts (page [420](#)).

**EnumerateStations:** This function is used to enumerate stations. See EnumerateStations (page [420](#)).

**EnumerateFamilies:** This function is used to enumerate families. See EnumerateFamilies (page [421](#)).

**EnumerateFamilyBatches:** This function is used to enumerate batches in a given family. See EnumerateFamilyBatches (page [421](#)).

**EnumerateBatches:** This function is used to enumerate batches in the system (not from a specific family). See EnumerateBatches (page [422](#)).

**LogEntry:** This function is used to make an entry in MANAGEit's plugin log. This can be used by developers to help with debugging.

## API\_InformationBlock

```
struct API_InformationBlock  
{  
    cChar sPluginName[_MAX_PLUGIN_NAME];  
    unsigned    uExpectedVersion;  
};
```

### Remarks

This structure is used by the plugin to let MANAGEit know what the plugin's name and MANAGEit's expected version. This information is passed in from the API\_GetInformation function and should be filled in. Defining API\_GetInformation is optional, but if it is defined, both fields of API\_InformationBlock should be filled in.

### Members

**MANAGEit Plugins**

sPluginName: This is the plugin's name. It does not have to match the name of the DLL file and can be named anything, up to a maximum of `_MAX_PLUGIN_NAME` characters in length.

uExpectedVersion: This is the expected version of MANAGEit's plugin engine. If the plugin engine version is not at least the expected version, then MANAGEit unloads the plugin and makes a log entry. The current version of the plugin engine is defined in `MANAGEitApi.h` as `_PLUGIN_VER`. This value should almost always be set to `_PLUGIN_VER`.

## API\_AlertInfo

```
struct API_AlertInfo
{
    char sAlertText[_MAX_ALERT_TEXT];
    char sStation[_MAX_STATION_NAME];
    char sFamily[_MAX_FAMILY_NAME];
    char sBatchID[_MAX_BATCH_ID];
    bool bLoading;
};
```

### Remarks

This structure contains information regarding a single triggered alert in the system, or an expired alert.

### Members

sAlertText: Contains the alert's text message.

sStation: Contains the station's name (if any) that triggered the alert.

sFamily: Contains the form family's name (if any) that triggered the alert.

sBatchID: Contains the batch's batch ID (if any) that triggered the alert.

bLoading: If set to `TRUE`, then this was triggered while MANAGEit was loading the control path information for the first time. Some plugins may ignore alerts that are triggered during the first loading.

## API\_RefreshInfo

```
struct API_RefreshInfo
{
    unsigned    uStations;
    unsigned    uCaptureIt;
    unsigned    uFamilies;
```

```
};
```

**Remarks**

This structure contains system refresh information. The system periodically refreshed the information presented. Select Settings | Control Path Definition to set the refresh rate for the system.

**Members**

uStations: Number of OCR for AnyDoc and VERIFYit stations monitored by the system

uCaptureIt: Number of CAPTUREit stations monitored by the system

uFamilies: Number of families monitored by the system

## API\_StationInfo

```
struct API_StationInfo
{
    char sUser[UNLEN+1];
    char sLogin[UNLEN+1];
    char sFamily[_MAX_FAMILY_NAME];
    char sBatch[_MAX_BATCH_ID];
    char sMaster[_MAX_MASTER_NAME];
    unsigned int uImage;
    unsigned long lElapsed;
    char sProcess[_MAX_PROCESS];
    char sVersion[_MAX_VERSION];
    char sSerial[_MAX_SERIAL];
    char sComputerID[MAX_COMPUTERNAME_LENGTH * 2 + 1];
    bool bTerminalServices;
};
```

**Remarks**

This structure contains single station information. It can be passed through the API\_OnRefreshStation function or obtained through the EnumerateStations (page [420](#)) function.

**Members**

sUser: The user's name who is logged on to the OCR for AnyDoc or VERIFYit station.

sLogin: The user's name used to log into the Windows station that the OCR for AnyDoc or VERIFYit is running on (may or may not be same as sUser).

**MANAGEit Plugins**

sFamily: The form family currently being processed, if any.

sBatch: The batch currently being processed, if any.

sMaster: The master form template image currently being processed, if any, in a batch.

uImage: Image number in the batch currently being processed. If sBatch is empty, this number is not valid and should be ignored.

lElapsed: Amount of time elapsed since the current operation or phase began processing.

sProcess: Name of the current phase being processed.

sVersion: Version number of the OCR for AnyDoc or VERIFYit station.

sSerial: Key serial number of the OCR for AnyDoc station.

sComputerID: The computer name of the station on the network. This is sometimes referred to as the computer's "Friendly Name."

bTerminalServices: TRUE if this station is running under Terminal Services. If running under Terminal services, the sComputerID contains the remote Computer name and the computer name running the software.

## API\_FamilyInfo

```
struct API_FamilyInfo
{
    char sName[_MAX_FAMILY_NAME];
    char sDesc[_MAX_FAMILY_DESC];
    long lImages[16];
    long lDocSets[16];
    long lAwaitingImport;
    long lEXCHANGEit Exceptions;
};
```

### Remarks

This structure contains single family information in the system. It can be passed through the API\_OnRefreshFamily function or obtained through the EnumerateFamilies (page [421](#)) function.

### Members

sName: Name of the form family's file.

sDesc: The family's description as set in OCR for AnyDoc.

lImages: Number of images in each phase in all batches for the family. This is an array, with each member of the array matching a specific phase. See Phase Numbers (page [427](#)).

lDocSets: Number of doc sets in each phase in all batches for the family. This is an array, with each member of the array matching a specific phase. See Phase Numbers (page [427](#)).

lAwaitingImport: Number of images pending import.

lEXCHANGEit Exceptions: Number of EXCHANGEit exceptions that are pending.

## API\_BatchInfo

```
struct API_BatchInfo
{
    char sBatchID[_MAX_BATCH_ID];
    char sBatchCtrl[_MAX_BATCH_CTRL];
    long lImages[16];
    long lDocSets[16];
};
```

### Remarks

This structure contains single batch information in the system. It is obtained through the `EnumerateFamilyBatches` (page [421](#)) or `EnumerateBatches` (page [422](#)) functions.

### Members

sBatchID: The batch identifier for the batch. This is a system assigned value.

sBatchCtrl: The batch control for the batch. This is an end-user assigned value.

lImages: Number of images in each phase in the batch. This is an array, with each member of the array matching a specific phase. See Phase Numbers (page [427](#)).

lDocSets: Number of images in each batch phase. This is an array, with each member of the array matching a specific phase. See Phase Numbers (page [427](#)).

## Phase Numbers

Some data structures have information in an array that is pertinent to specific phases in OCR for AnyDoc's workflow. The following defines can be used as the array's subscript to obtain the information for that phase.

- IDENTIFICATION\_WORK
- EXCEPTION\_WORK
- EXTRACTION\_WORK

---

**MANAGEit Plugins**

- PASS1\_VERIFICATION\_WORK
- PASS2\_VERIFICATION\_WORK
- SUPERVISOR\_VERIFICATION\_WORK
- COMMIT\_WORK
- QUALITY\_ASSURE\_WORK
- QA\_RESCAN\_WORK
- QA\_REVIEW\_WORK
- HSV\_VERIFICATION\_WORK
- BALANCE\_VERIFICATION\_WORK
- PRE\_VERIFICATION\_WORK
- INFINIWORX\_WORK
- AUDIT\_VERIFICATION\_WORK

For example, to get the number of images currently in the Extract phase for a family passed in through the `API_OnRefreshFamily` function, do the following:

```
int nExtraction = pFamily->IImages[EXTRACTION_WORK];
```

---

# 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](http://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:

---

**Glossary of Terms**

- **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**

OnBase AnyDoc product that automates healthcare forms processing.

**AnyDocEOB**

OnBase AnyDoc product that quickly processes all Explanation of Benefits (EOB) forms.

**AnyDocINVOICE**

OnBase AnyDoc 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.

**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.

---

**Glossary of Terms**

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**

OnBase AnyDoc 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**

OnBase AnyDoc product used to scan invoices, forms and documents either locally or remotely for processing at a central site.

**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.

---

**Glossary of Terms****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).

**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 (**Parameters Toolbox** button | **Data Definition Parameters**).

## 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.

---

**Glossary of Terms****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.

**DESIGNit**

OnBase AnyDoc 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 [437](#)).

**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.

---

**Glossary of Terms****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 [459](#)).

**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.

**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**

OnBase AnyDoc 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.

---

**Glossary of Terms****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**

OnBase AnyDoc 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.

**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.

---

**Glossary of Terms****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.

**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**

OnBase AnyDoc 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 OnBase AnyDoc 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.

---

**Glossary of Terms****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.

- 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 of Terms**

- 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 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 OnBase AnyDoc 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**

OnBase AnyDoc 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.

## **Map**

The act of associating a zone with one or more fields.

---

**Glossary of Terms****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**

OnBase AnyDoc 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.

### **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.

---

**Glossary of Terms**

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.

**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.

---

**Glossary of Terms****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.

**Rope and Expand**

Term for selecting part of a form in template design. Roping and expanding “zooms 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.

---

**Glossary of Terms****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.

**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.

---

**Glossary of Terms****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.

**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.

---

**Glossary of Terms****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. OnBase AnyDoc 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 [438](#)).

**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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