Administrator's Guide, Part 3:

Utilities

process backbone
Exigen Workflow 5.6
Process Control Services

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Preface

This preface is an introduction to the *Exigen Workflow Administrator's Guide, Part 3: Utilities.*

The following topics are described in this section:

- Audience
- Related Information
- Typographic Conventions

Audience

This guide is intended for system administrators. The system administrator is often referred to as the administrator.

This guide assumes basic computer knowledge for performing Windows® operations. It also assumes a familiarity with Open DataBase Connectivity (ODBC) and basic experience working with structured query language (SQL) and databases.

Related Information

The following table lists guides that provide related information about Exigen Workflow:

Related documentation	
Title	**Description**
Exigen Workflow User's Guide	Describes how to operate Exigen Workflow.
Exigen Workflow Administrator's Guides I-III	Defines the main concepts underlying Exigen Workflow and describes how to create projects and set up, manage, and monitor the system.
Exigen Workflow Installation Guide	Describes how to install Exigen Workflow.
Exigen Workflow Web User's Guide	Describes how to use the Exigen Workflow Internet solution.

Typographic Conventions

The following styles and conventions are used in this guide:

Typographic styles and conventions	
Convention	**Description**
Bold	• Represents user interface items such as check boxes, command buttons, dialog boxes, drop-down list values, field names, menu commands, menus, option buttons, perspectives, tabs, tooltip labels, tree elements, views, and windows. • Represents keys, such as **F9** or **CTRL+A.** • Represents a term the first time it is defined.
`Courier`	Represents file and directory names, code, system messages, and command-line commands.
`Courier Bold`	Represents emphasized text in code.
Select **File > Save As**	Represents a command to perform, such as opening the **File** menu and selecting **Save As.**
Italic	• Represents any information to be entered in a field. • Represents documentation titles.
< >	Represents placeholder values to be substituted with user specific values.
Hyperlink	Represents a hyperlink. Clicking on this field takes you to the identified place in this guide.

Chapter 1: Introduction

This section introduces the utility applications available in Exigen Workflow. The following topics are described in this section:

- Overview
- Exigen Workflow Utilities

Overview

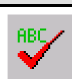
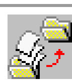
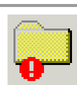
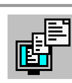
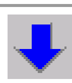
Exigen Workflow utilities perform maintenance procedures within Exigen Workflow applications and throughout the database. Some utilities are designed to create electronic stamps and templates used in specific workflow applications.

Administration-level users use utilities to maintain database integrity. To ensure database integrity, access to utilities is assigned through the Levels feature during system setup, as described in the *Exigen Workflow Administrator's Guide, Part 1: Design and Configuration,* Chapter 4: Setting Up Exigen Workflow*.*

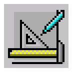
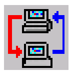
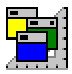
Exigen Workflow Utilities

Each utility is designed to perform a different database maintenance function, as described in the following table:

Exigen Workflow utilities

Utility	Icon	Description
Check Document Utility		Checks the integrity of the images in the system. If corrupt images are located, they can be sent to a specific queue and user for handling. This allows implementing multiple corrections rather than waiting for end user notifications concerning specific problems.
Clear Cache Utility		Clears specific cache directories filled during the commit process or moves cache content to an optical or other archive storage medium.
Empty Folders Maintenance Utility		Creates a file listing all folders to which no documents are assigned. This allows the administrator to delete these folders and free up space in the database.
FTS Maintenance		Configures FTS settings in projects. It defines stopwords and the algorithm for splitting extracted text into words, and detects documents that are not correctly processed.
Orphan Utility		Locates discrepancies between the database and the actual files. When run, it lists image files without matching database records in the document table. These files can be routed to a specific queue, and then reviewed and processed.

Exigen Workflow utilities

Utility	Icon	Description
Stamp Management		Creates and maintains electronic rubber stamps to be applied to document images. Stamps are created either by scanning a document with a stamp on it or by loading a TIFF or other image file containing the stamp to use.
Template Management Utility		Creates and maintains form templates to be used for Form Overlay and Form Optical Character Recognition processing. Data is either overlaid or extracted from specific form templates, depending on which process is used.
Transfer Utility		Defines the images to transfer from one medium to another. When the new storage location is configured, all selected documents are transferred.
E-Capture Definition Utility		Defines individual forms for recognition and information extraction. These forms are created as PDF or PCL files.
Publisher Packager		Packages a collection of Exigen Workflow folders, subfolders, and documents into one directory that can be copied onto a CD. The folders, subfolders, and folders can be viewed remotely without being connected to the Exigen Workflow system.

Chapter 2: Check Document Utility

This section explains how to search a set of documents to locate image files that are corrupt or not located where the database pointers indicate. This section also explains how to verify that the page counters are synchronized.

The following topics are described in this section:

- Overview
- Using the Check Document Utility
- Configuring the Distribution of Affected Documents
- Defining the Search Criteria
- Check Document Utility Menus and Buttons

Overview

Check Document Utility is used to perform an integrity check on document files. Check Document Utility must be run prior to shredding the original paper documents because rescanning is sometimes necessary and cannot be performed after shredding.

Three types of checks are performed during the Check Document Utility process:

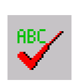
1. An internal check on the document files ensures that they are not corrupted. If the file is corrupted and cannot be recovered, it can be deleted and the pages can be rescanned into the system.
2. This check ensures that the document files are located where the database pointers indicate them to be. If the document file is not located where the pointers indicate, it is necessary to search for the document record. If the file is found, it is moved to the proper location. If the document file is not found, the pages must be rescanned.
3. This check ensures that the number of pages found in the document corresponds to the number of pages indicated in the database for that document record.

An optional check can be performed to determine if quick tiles were created for a specific group of documents.

Using the Check Document Utility

To use Check Document Utility, perform the following steps:

1. To open the **Check Document Utility** window, in the **Exigen Workflow Explorer** window, select the **Utilities** folder and double-click **Check Document Utility.**

   The **Check Document Utility** window appears.

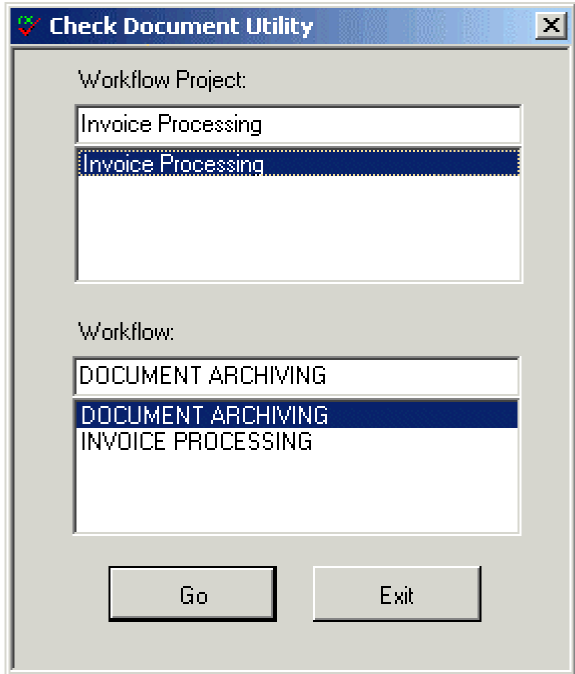


Figure 1: Exigen Workflow Check Document Utility window

The **Workflow Project** field lists all Exigen Workflow projects registered in the database. The **Workflow** field lists all workflow applications assigned to the selected project.

2. In the **Workflow Project** field, select a project to check.
3. In the **Workflow** field, select a workflow to check.
4. To proceed, click **Go.**
   Another **Check Document Utility** window appears.
5. If you do not want to check a project or workflow, click **Exit.**

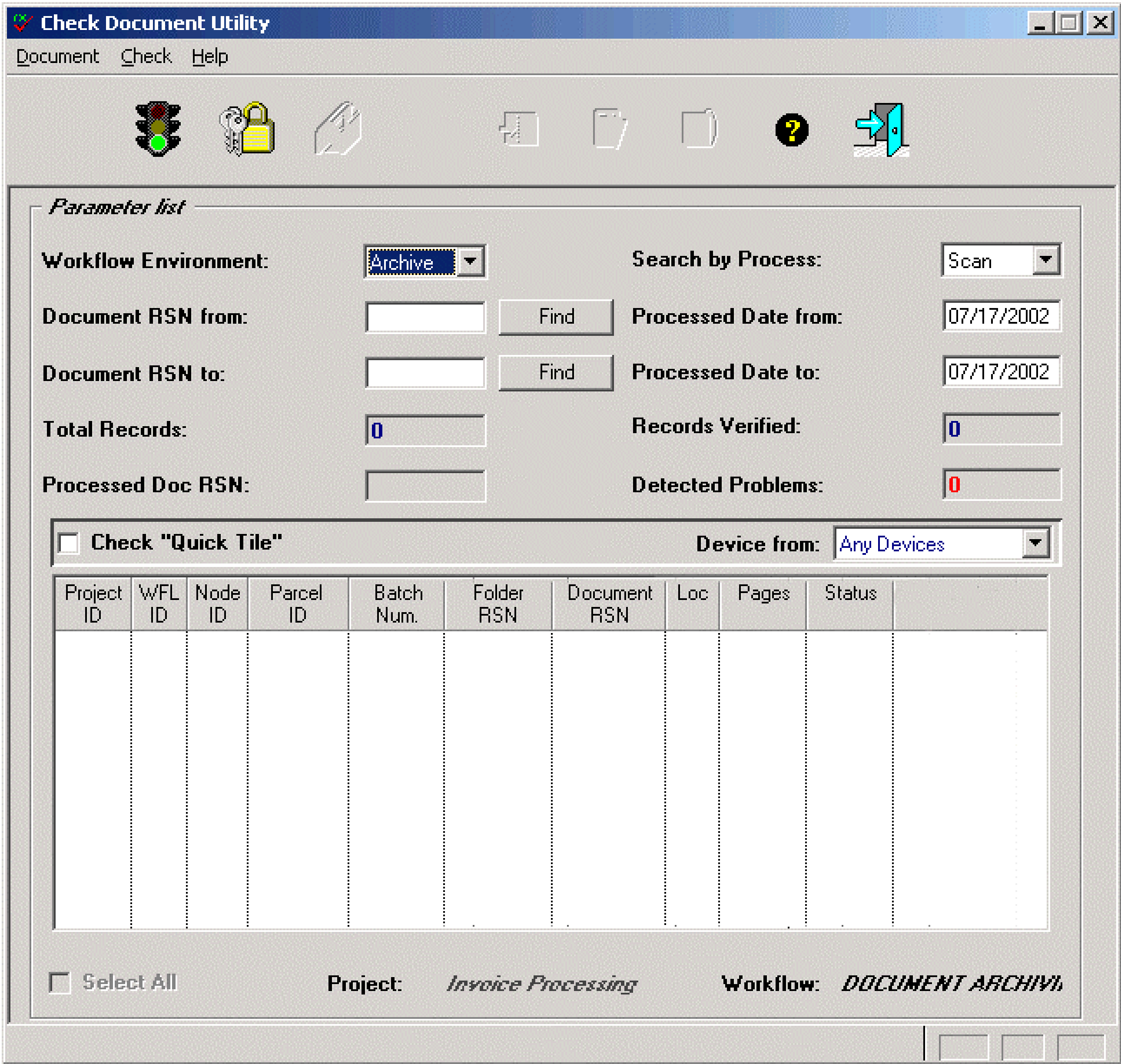


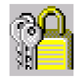
Figure 2: Check Document Utility window

All fields are empty initially. Before searching for corrupted documents you must configure where the affected documents are sent.

Configuring the Distribution of Affected Documents

The **Distribution Setup** window is used to define the queue where affected documents are routed. It is also used to determine the image file destination and the resulting operation. To configure the distribution of affected documents, perform the following steps:

1. To open the **Distribution Setup** window, in the **Utility** window, click **Distribution Setup.**



The **Distribution Setup** window appears.

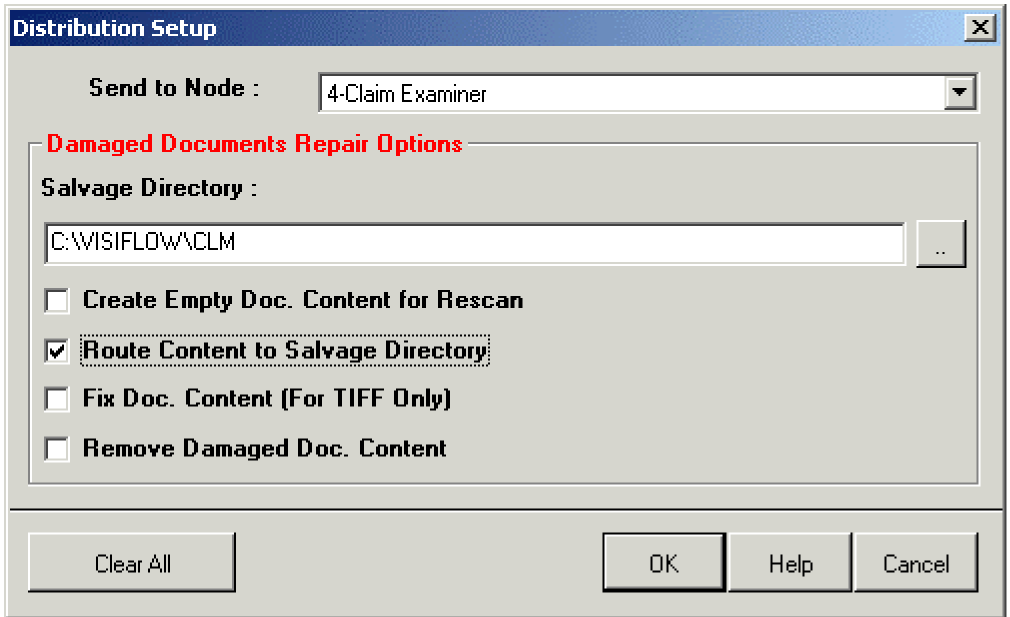
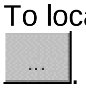


Figure 3: Distribution Setup window

2. In the **Send to Node** list box, select the node, or queue, where you want to route the database records.

   The records are sent to the current user.

3. In **Damaged Document Repair Options,** select the actions to be taken to repair the documents.

4. To locate the directory where you want to send the affected documents, click the browse button .

   The system places the three-character **Project ID** after the selected directory string. If the subdirectory does not already exist, the system asks for permission to create it.

5. To automatically create the subdirectory, click **Yes.**

6. To use the salvage directory, click **No.**

   If you select **No,** you must manually create the directory.

   The **Salvage Directory** must be specified to use one of the check box options listed in the following table:

Salvage Directory options	
Option	**Description**
Create Empty Doc. Content for Rescan	Deletes the affected DMS files but retains the database information. The document number and all related data are retained so that the documents can be rescanned without changing the document number.
Route Content to	Copies the affected files to the salvage directory.

Salvage Directory options	
Option	**Description**
Salvage Directory	
Fix Doc. Content, for TIFF Only	If the header information is corrupted, repairs the document file by treating it as a TIFF file and searching for specific characters within the document. Once it is re-created in TIFF format, the file is converted back into a DMS file so that it can be viewed.
Remove Damaged Doc Content	Deletes the affected DMS file from its current location.

7. Select an action and click **OK.**

Defining the Search Criteria

Once you configure where the affected documents are sent, you must determine which documents you want to check. The **Parameter List** section of the **Distribution Setup** window is used to define the search criteria. To define the search criteria, perform the following steps:

1. To select whether to check documents residing in the current workflow or archived documents, in the **Workflow Environment** list box, select **Workflow** or **Archived.**
2. To search for affected documents within a specific range of document numbers, in the **Document RSN From** field, enter the first number.
3. To begin with the first document number in the database, click **Find.**
4. To search in a range, in the **Document RSN To** field, enter the last number of the range.
5. To retrieve the last document number in the database, click **Find.**
6. To specify a date option for searching the database, select one of the following **Search by Process** options:

Search by Process options	
Option	**Description**
Scan	Uses the document creation date as the search parameter.
Modify	Uses the document modification date as the search parameter.
Commit	Uses the document commitment date as the search parameter.

7. To define the date range, enter the beginning date in the **Processed Date From** field and the ending date in the **Processed Date To** field.

   The default values for each field are the current date.
8. To check whether Quick Tiles or thumbnail views of each image page were created during scanning, select the **Check "Quick Tile"** check box.
9. To define document storage, select one of the following **Device from** options:

Device from options	
Option	**Description**
Optical	Searches on optical storage devices only.
Server	Searches on server storage devices only.
Magnetic	Searches on magnetic storage devices only.
Any Devices	Searches on all storage devices.

The **Check Document Utility** window displays the specified settings.

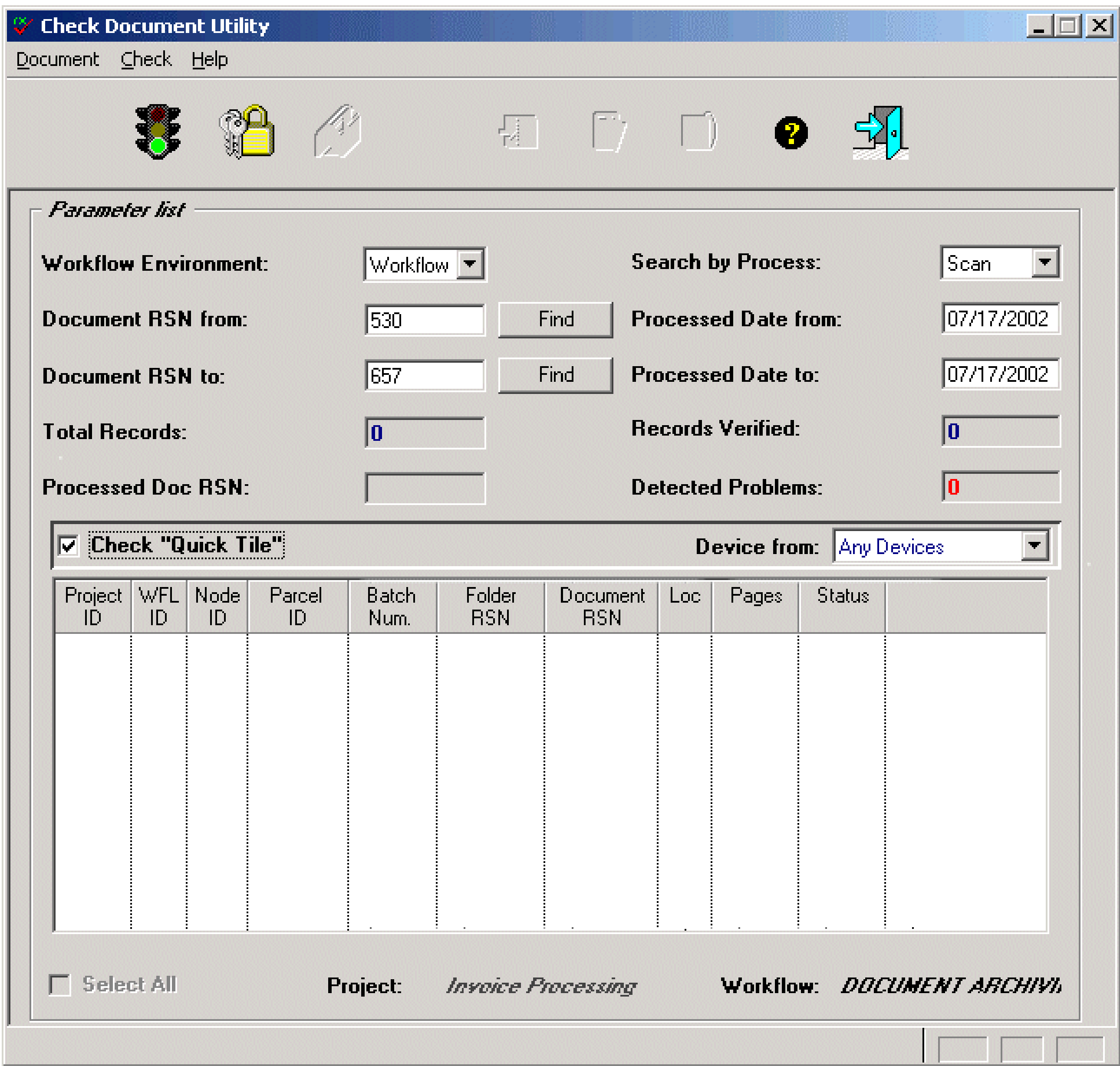
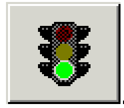


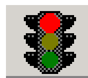
Figure 4: Filled out Check Document Utility window

10. To search for corrupted documents, click **Start** .

    During processing, the **Total Records** field displays the number of records processed, and the **Records Verified** field displays the number of verified records.

    The **Processed Doc RSN** field displays the number of the document currently being processed. The **Detected Problems** field displays the number of affected image files found.

    If the selected range of documents is large, such as specified document RSNs or Processed Dates, the checking process can be lengthy.

11. To stop the process, click **Stop** .

When the checking process is completed, the **Check Document Utility** window displays a list of problematic documents.

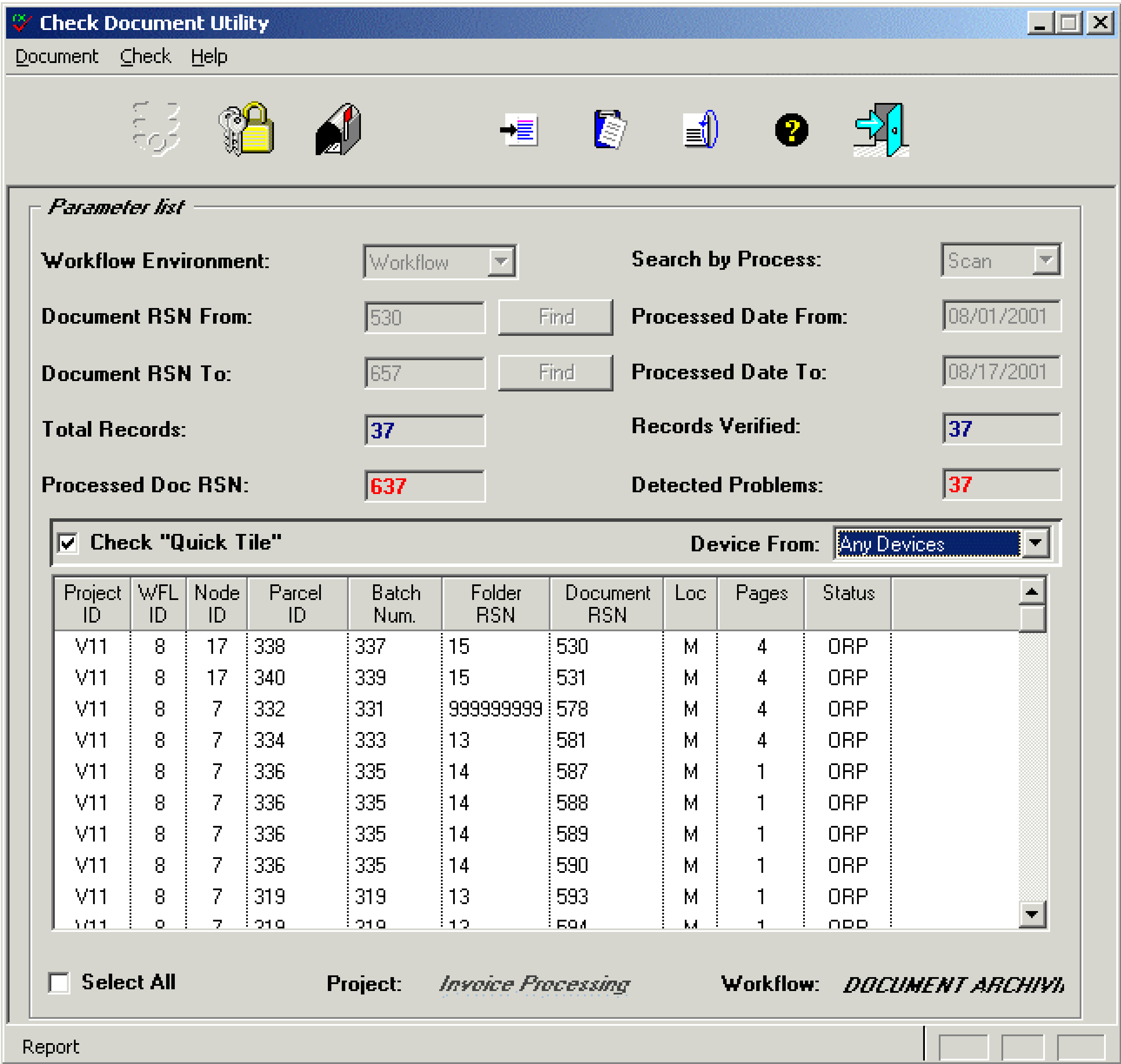


Figure 5: List of corrupted documents

All buttons except **Start** are enabled. For information on these buttons, see Check Document Utility Menus and Buttons.

The results table at the bottom of the window displays any document that meets the search criteria and is corrupted. If no documents appear in the table, the utility has not detected any problems. The following table describes the columns in the results table:

Results table	
Column	**Description**
Project ID	Project where the document is located.
WFL ID	ID of the workflow where the document is located.

Results table	
Column	**Description**
Node ID	Node where the document is located.
Parcel ID	ID of the parcel to which the document is assigned.
Batch Num.	Batch number to which the document is assigned.
Folder RSN	Number of the folder to which the document is assigned.
Document RSN	Number of the affected document.
LOC	Location of the document: • **M:** Magnetic • **O:** Optical • **S:** Server
Pages	Number of pages in the document.
Status	Current status of the document: • **DMS:** records in the database exist, and the document file is present, but the file is corrupted. • **ORP:** an orphan document where the records in the database exist, but the document file is not found, for example, if the file was deleted manually outside Exigen Workflow without updating the database records. • **PGS:** number of pages actually present in the document file does not match the number of pages stored in the database. • **Sent:** document is sent to the designated queue. • **Tile:** Quick Tiles for the image were created.

To work with corrupted documents, perform the following steps:

1. To view an individual document, highlight it and click **Display.**

   If the image is viewable, it appears in the Image Viewer on the right side of the window. If not, an error message appears that describes the problem.

2. To create and view a report listing the affected documents, click **Report.**
3. In the **Problem Docs - Save File** window, enter the name of the report file and click **Save.**

   The **Centura Report Builder** window displays the affected documents in report form.

4. To send one or more documents to the queue assigned in the **Distribution Configuration** window, select the documents and click **Send.**
5. To highlight multiple documents for sending, use click and drag, or the **CTRL** key.
6. To send all the documents, select **Select All** and click **Send.**

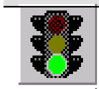
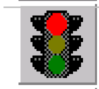
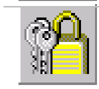
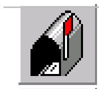
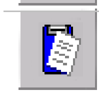
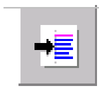
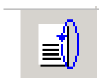
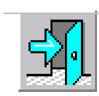
   The records remain in the list and appear in the specific queue for the current user ID.

7. To clear the list, click **Clear.**

Check Document Utility Menus and Buttons

The following table describes the **Check Document Utility** window buttons and menu functions:

Check Document Utility window buttons and menu functions

Button	Shortcut key	Menu command	Description
		**Check > Start**	**Start** Checks for corrupted documents.
		**Check > Stop**	**Stop** Stops the checking process.
		**Check > Distribution Setup**	**Distribution Setup** Opens the **Distribution Configuration** window used to determine where and how the affected document records are distributed.
	**CTRL+S**	**Document > Send**	**Send Document** Sends all selected documents to the repair queue.
	**CTRL+R**	**Document > Report**	**Report** Saves the list of affected documents, which can be displayed and printed via the Centura Report Builder.
	**CTRL+D**	**Document > Display**	**Display Document** Displays the selected image file in the Image Viewer on the right side of the window.
		**Check > Clear**	**Clear Entries** Clears all entries in the results portion of the window.
	**F1**	**Help > Context Help**	**Context Help** Opens the help section.
	CTRL+F1	**Help > Help Topics**	**Help Topics** Displays a list of available help topics.
		Help > About Exigen Workflow System	**About Exigen Workflow System** Displays copyright and release information regarding Exigen Workflow.
	**F12**	**Document > Exit**	**Exit the System** Closes the **Check Document Utility** window.

Chapter 3: Clear Cache Utility

This section describes Clear Cache Utility and how to use it. The following topics are described in this section:

- Overview
- Using the Clear Cache Utility Window
- Clear Cache Utility Menus and Buttons

Overview

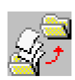
Clear Cache Utility is used to identify documents that are modified after being moved to a storage medium via the Commit process. Since the committed document cannot be changed, the modified file is stored in the `Cache` directory. The documents found in the `Cache` directory were edited using the Edit Tools feature in the Image Viewer in the Retrieve object.

Once identified, the modified image files can be moved back into the workflow for further review or discarded. They can also be moved to the Commit queue to be recommitted when the pointers in the database are changed to reflect the new location of the document. Regardless of the action, the original image file remains in the same location on the storage medium.

Using the Clear Cache Utility Window

To use Clear Cache Utility, perform the following steps:

1. To clear the cache directories, in the **Exigen Workflow Explorer** window, select the **Utilities** folder and double-click **Clear Cache Utility.**



   The **Clear Cache Utility** window appears.

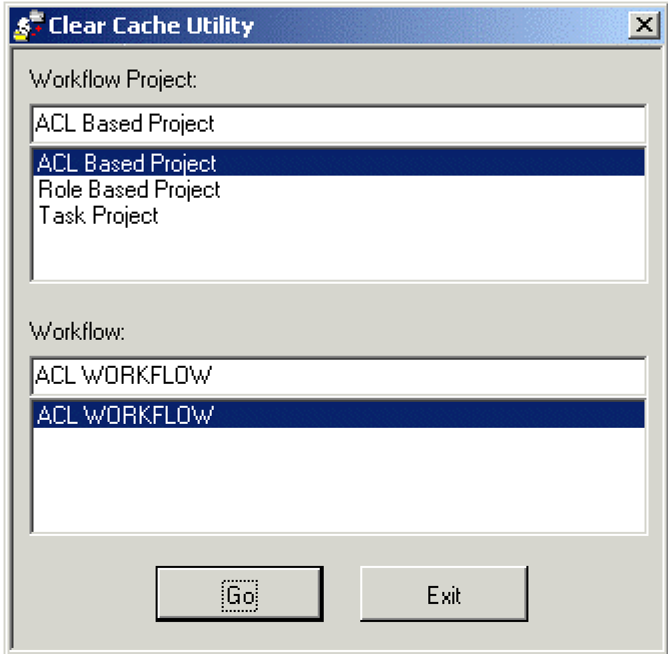


Figure 6: Clear Cache Utility window

2. Select the Exigen Workflow project and workflow to clear and click **Go.**
   The **Clear Cache Utility** window appears.

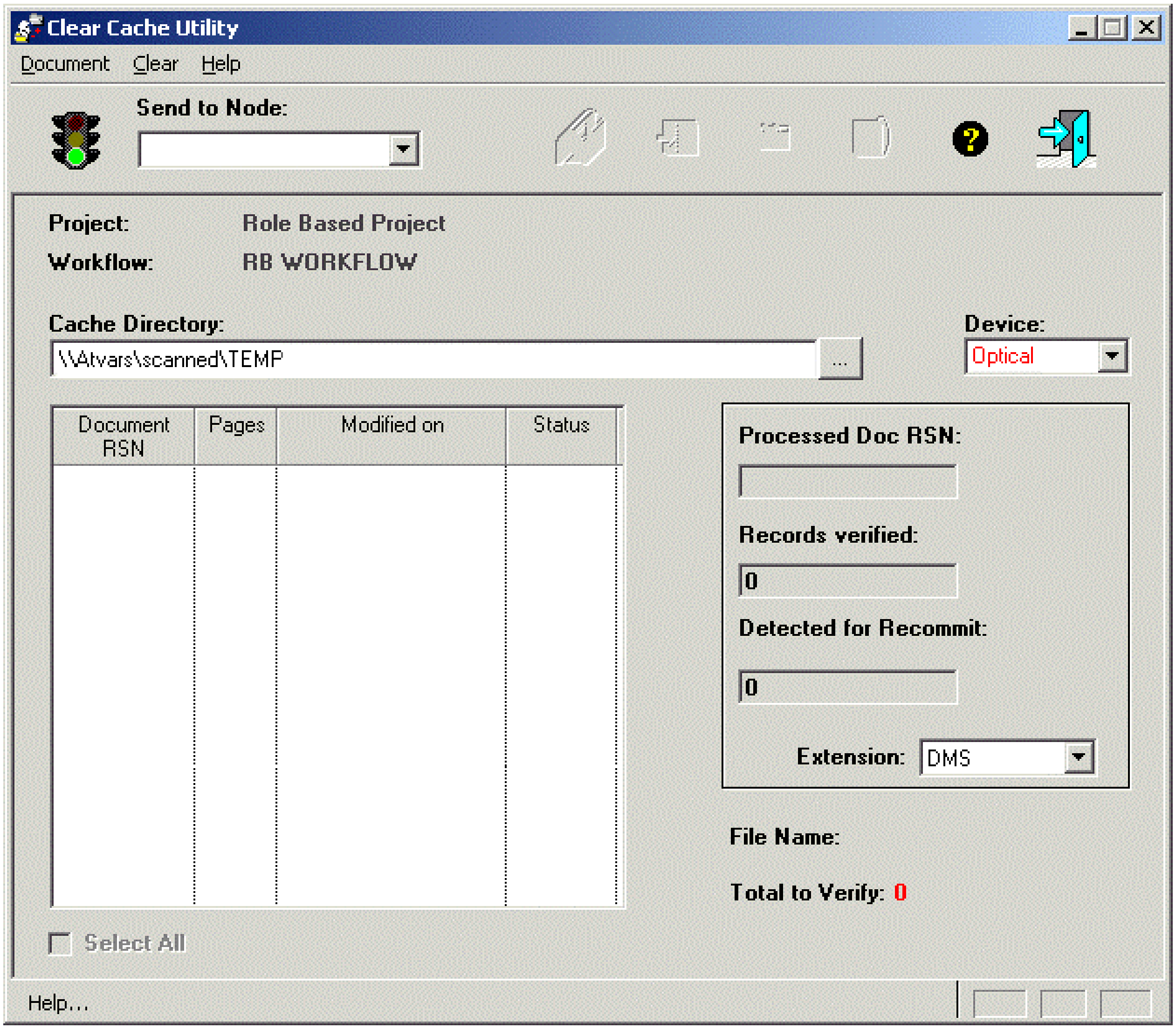


Figure 7: Clear Cache Utility window

The **Cache Directory** list box displays all the cache directories configured for the current project and workflow.

3. To view all modified files, perform the following steps:
   1. In the **Cache Directory** list box, select a directory to view.
      The **Device** list box displays all devices where committed documents are stored.
   2. In the **Device** list box, select a directory to compare against the cache.

Note: This information is based on the configurations setup in the **Config** portion of the Administrator application.

   3. In the **Extension** list, select an extension.
      The **Extension** list box contains the available file extensions in the project. In addition to the DMS extension that is the standard Exigen Workflow image file extension, all the extensions associated with the **Task** setup in the database are listed.
   4. Click **Start.**

The utility compares all committed documents and lists all modified ones in the table.

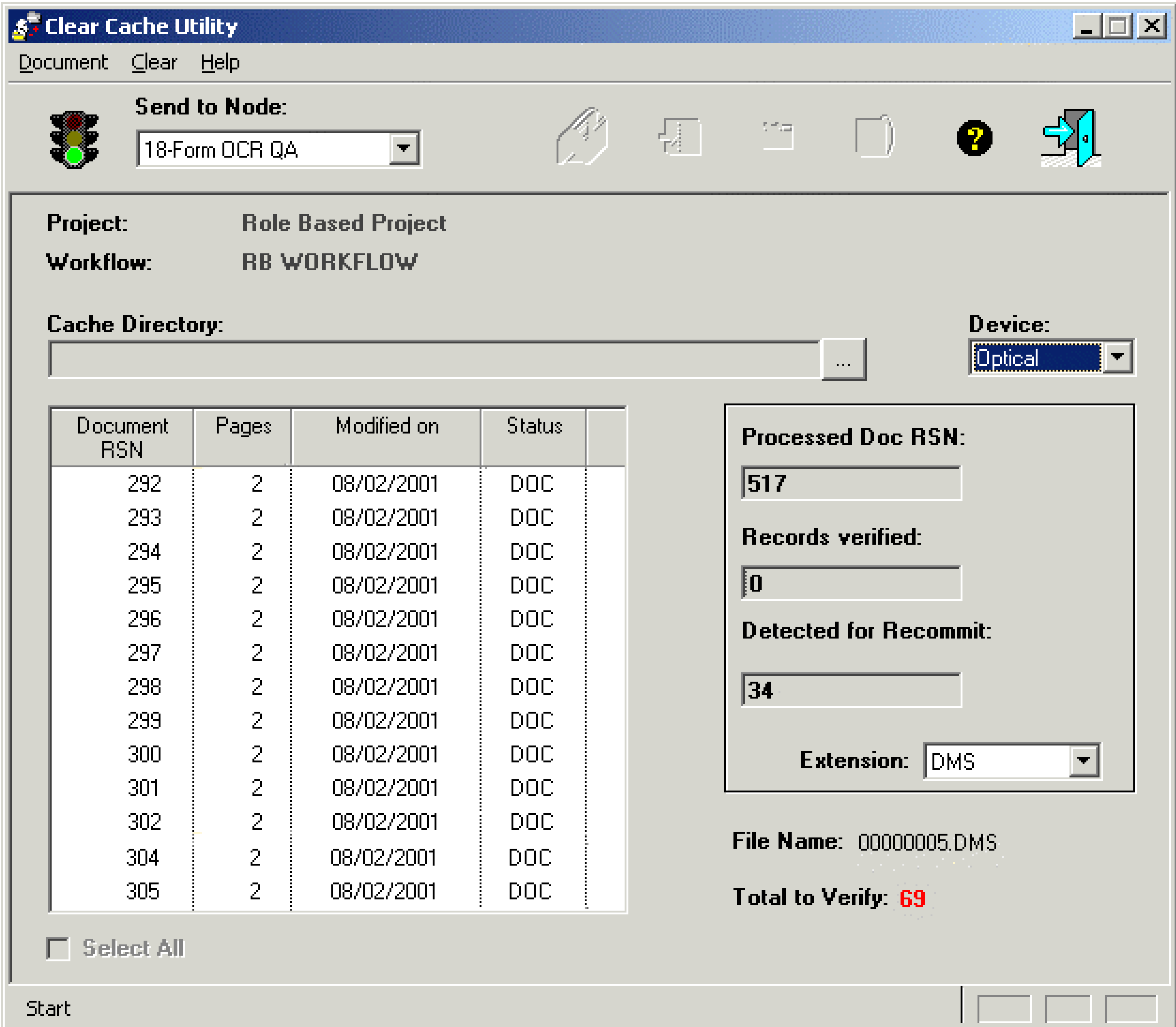


Figure 8: Modified documents

The following fields are displayed while the process is running:

Clear Cache, processed data fields	
Field	**Description**
Processed Doc RSN	Number of the currently processed document.
Records verified	Number of documents verified in the selected cache directory.
Detected for Recommit	Number of altered documents found to recommit.
File Name	Name of file being processed.
Total to Verify	Number of altered documents found in the selected cache directory.

The table lists all modified files found. The following table describes the columns contained in the results table:

Results table columns	
Column	**Description**
Document RSN	Internal document number.
Pages	Number of pages in the document.
Modified on	Last time the document file was modified.
Status	Current document status: • **DOC:** record exists in the document table. • **DEL:** record was discarded from the `cache` directory. • **Sent:** record was sent to a queue.

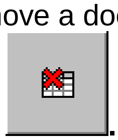
4. To send documents to a specific node, proceed as follows:
   - In the **Send to Node** list box, select the workflow node to which to route the modified document files.
   - Select documents that must be sent to the node.
   - Click **Send.**

   The document status changed to **Sent** in the document list.

   The documents must be routed either to a specific node and user for further review, or to the Commit node to be recommitted to an optical storage device.

5. To view a document, click **Display.**

   The selected document is opened in the Image Viewer.

6. To remove a document from the cache directory, in the list, select the document record and click **Delete** .

   Depending on the configuration, the **Delete** button may be disabled.

   If document versioning is not used, the status of the **Delete** button is controlled by the following section in Configuration Browser:

   `ClearCacheOptions/EnableDelete`

   If this section is defined in the system and its value is set to *y*, *Y*, or *1*, the **Delete** button is enabled. Otherwise, the **Delete** button is disabled.

   If document versioning is used, the **Delete** button is always disabled.

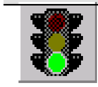
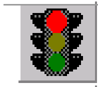
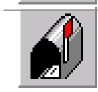
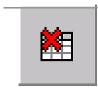
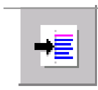
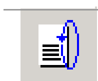
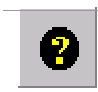
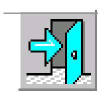
   If a document is deleted, the document status is changed to **Del** in the document list.

7. To clear the document list, click **Clear.**

Clear Cache Utility Menus and Buttons

The following table describes the **Clear Cache Utility** window buttons and menu functions:

Clear Cache Utility window buttons and menu functions

Button	Shortcut key	Menu command	Description
		**Clear > Start**	**Start** Compares cache documents to stored documents.
		**Clear > Stop**	**Stop** Stops the comparing process.
		**Document > Send**	**Send Document** Sends all selected documents to the assigned node.
		**Clear > Delete**	**Delete** Deletes the selected files from the cache directory.
		**Document > Display**	**Display Document** Displays the selected image file in the Image Viewer on the right side of the window.
		**Clear > Clear**	**Clear** Clears all entries in the results portion of the window.
	**F1**	**Help > Context Help**	**Context Help** Opens the help section.
	CTRL+F1	**Help > Help Topics**	**Help Topics** Displays a list of available help topics.
		Help > About Exigen Workflow	**About Exigen Workflow** Displays copyright and release information regarding Exigen Workflow.
	**F12**	**Document > Exit**	**Exit the System** Closes the **Clear Cache Utility** window.

Chapter 4: Empty Folders Maintenance Utility

This section explains how Empty Folders Maintenance Utility works. The following topics are described in this section:

- Overview
- Using the Empty Folders Maintenance Window
- Empty Folders Maintenance Utility Menus and Buttons

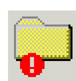
Overview

Empty Folders Maintenance Utility is used to identify the folders in the database that do not have assigned documents. If an empty folder is found, the utility offers you the option to either keep or delete the folder records. Deletion is recommended to optimize the database space on the server.

Using the Empty Folders Maintenance Window

To start processing the empty folders in your database, perform the following steps:

1. In the **Exigen Workflow Explorer** window, select the **Utilities** folder and double-click **Empty Folders Maintenance**.

   The **Empty Folders Maintenance Utility** window appears.

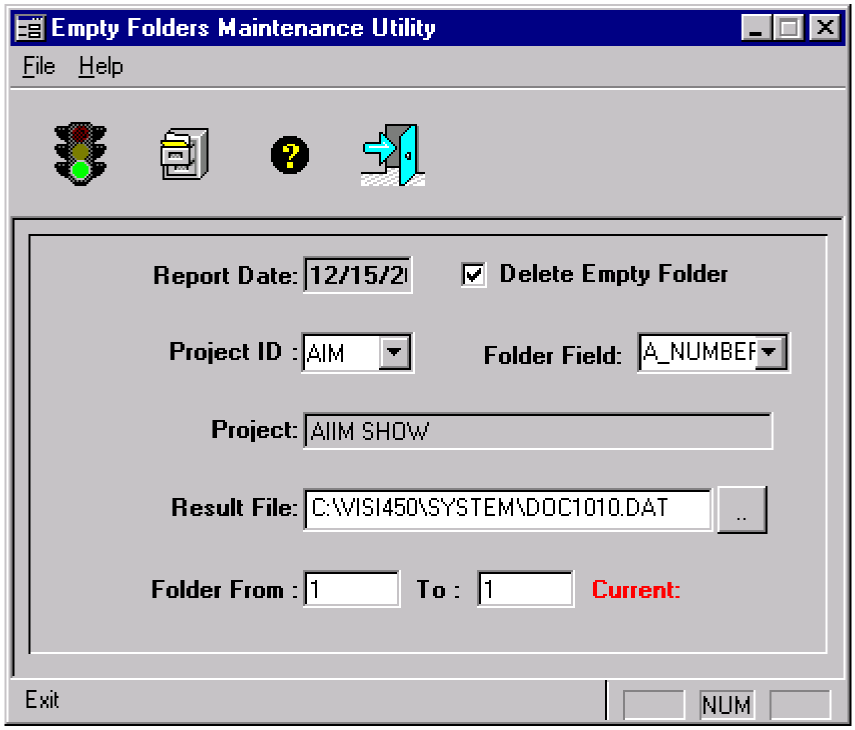


Figure 9: Empty Folders Maintenance Utility window

The **Report Date** is set to the current date by default and cannot be changed.

2. To remove empty folders from the system, select the **Delete Empty Folder** check box.

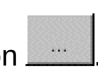
   If this box is not selected, the records must be deleted manually.

3. In the **Project ID** list box, select the project you want to check for empty folders.

   The project name appears in the **Project** field.

4. In the **Folder Field** check box, select the field you want to view in the results file.

   The value in the **Result File** field is generated by the utility and reflects the path where the Exigen Workflow executables reside. The **Result File** field also includes a datafile name of **DOC** plus the current month and day followed by a **DAT** extension.

5. To change the value in the **Result File** field, click the browse button .

   The **Folder From** and **To** fields are associated with the folder numbers in the current project and can be changed if required. If your project contains a large number of folders, only a few must be processed at a time so that the results file does not become too large.

6. To begin processing, click **Start** or select **File > Start.**

   The **Current** folder being processed appears in red. When all the defined folders are checked, the following buttons are enabled:

   - **Close**
   - **Start**
   - **Read File**

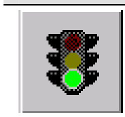
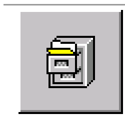
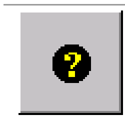
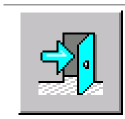
7. To view the list of all empty folders, click **Read File** or select **File > Read File.**

Notepad opens with a list of the field values for all folders meeting the empty folder criteria.

8. To close the **Empty Folders Maintenance** window, click **Close.**

Empty Folders Maintenance Utility Menus and Buttons

The following table describes the **Empty Folders Maintenance Utility** window buttons and menu functions:

Empty Folders Maintenance Utility window buttons and menu functions			
Button	**Shortcut key**	**Menu command**	**Description**
		**File > Start**	**Start** Identifies empty folders.
	**F4**	**File > Read File**	**Read File** Opens the list of all empty folders.
	**F1**	**Help > Context Help**	**Help** Opens the help section.
	CTRL+F1	**Help > Help Topics**	**Help Topics** Displays a list of available help topics.
		Help > About Exigen Workflow	**About Exigen Workflow** Displays copyright and release information regarding Exigen Workflow.
	**F12**	**File > Exit**	**Exit Application** Closes the **Empty Folders Maintenance** window.

Chapter 5: Full Text Search Maintenance Utility

This section explains how to configure FTS Preprocessor. This section also describes how to define indexing DLL files that FTS Server uses to create the FTS Index.

The following topics are described in this section:

- Overview
- Using the FTS Maintenance Utility Window
- Maintaining the Stopwords List
- Configuring Full Text Search
- Viewing Erroneous Documents
- FTS Maintenance Utility Menus and Buttons

Overview

The **FTS Index** is created by adding all words in text files, except stopwords, to the list. The stopwords are configured using FTS Maintenance Utility. For more information on stopwords, see Maintaining the Stopwords List.

The FTS Index is created by FTS Server, which uses a predefined structure of extracting and configuring words from documents. The predefined structure is defined in an indexing DLL file.

One or more indexing DLL files can be set. The FTS Index can contain one or several indexes. If several indexes are set, a user can select an index to use when retrieving documents.

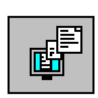
FTS Maintenance Utility allows you to set the indexing DLL file or files. Indexing DLL files are designed according to customer needs. For more information on DLL files, see Configuring Full Text Search.

When running FTS Preprocessor and FTS Server, document corruption or other errors may occur. All erroneous documents can be viewed and reindexed in FTS Maintenance Utility. For more information on corrupted files, see Viewing Erroneous Documents.

Using the FTS Maintenance Utility Window

To configure and maintain the list of keywords, perform the following steps:

In the **Exigen Workflow Explorer** window, select the **Utilities** folder and double-click **FTS Maintenance.**



The **FTS Maintenance** window appears.

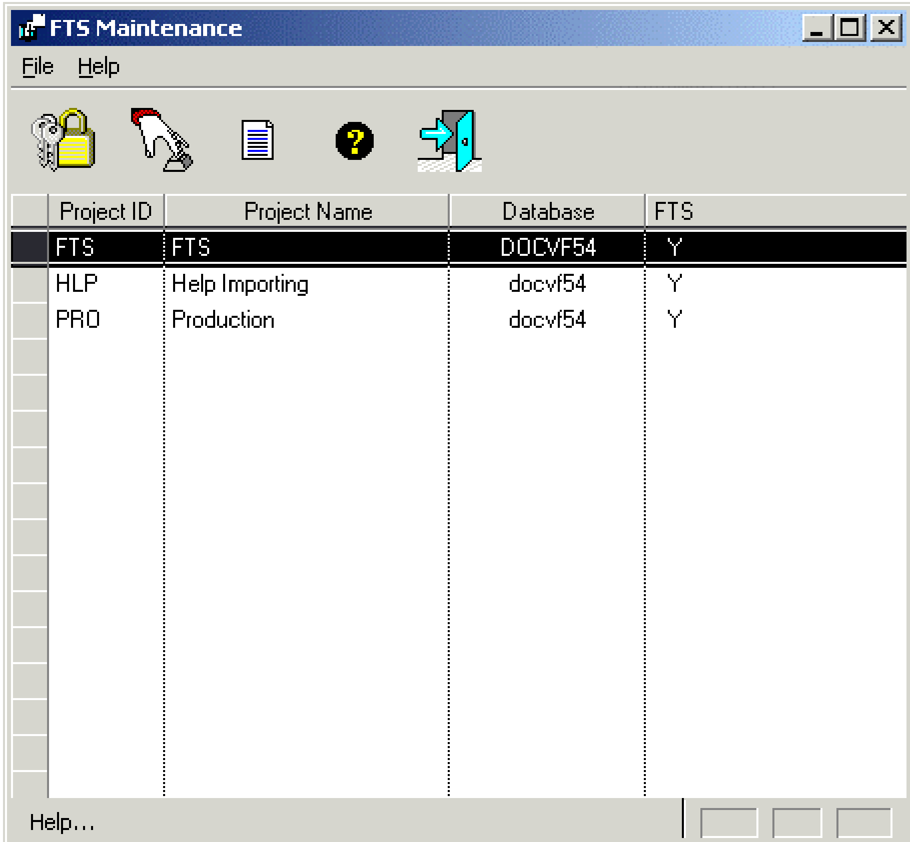


Figure 10: Full Text Search Maintenance window

The **Full Text Search Maintenance** window contains the following features:

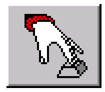
- menu and button bars as described in FTS Maintenance Utility Menus and Buttons
- table containing the following existing projects in the system:

FTS Maintenance window, existing projects	
Column	**Description**
Project ID	Project IDs in the system.
Project Name	Project names in the system.
Database	Database where the projects reside.
FTS	Flag indicating that the project is set up to use FTS service.

Maintaining the Stopwords List

To maintain the stopwords list, perform the following steps:

1. In the **FTS Maintenance** window, click **Stopword Maintenance.**



The **Stopword Maintenance** window appears.

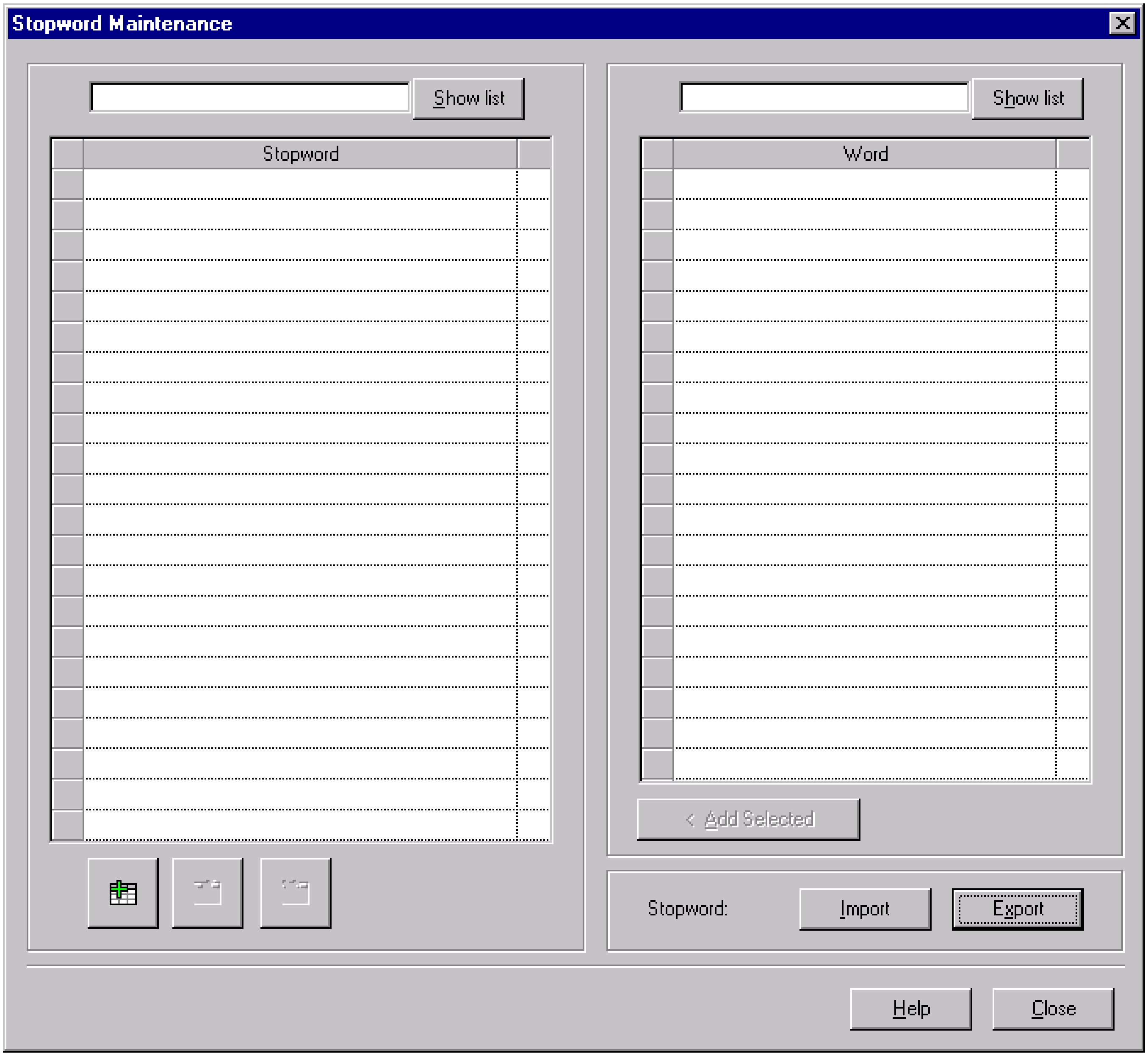


Figure 11: Stopword Maintenance window

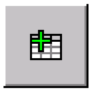
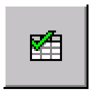
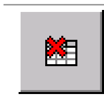
The **Stopword** list displays existing project stopwords. The **Word** list contains all words in the existing index. If a word repeats in all documents, it is useful to move the word to the **Stopword** list to narrow the search results. Stopwords are not case sensitive.

2. To add the words selected in the **Word** list to the **Stopword** list, click **Add Selected.**
3. To view words in the list, in the field above the appropriate list, enter the first letters of a word and click **Show List.**

If nothing is entered in the field before clicking **Show List,** all words of the list are displayed.

Not all words in a list are displayed at once because displaying a large number of words can slow performance.

The following actions can be performed with stopwords:

Stopword Maintenance window buttons	
Button	**Description**
	**New Stopword** Adds a new stopword to the list.
	**Edit Stopword** Opens the selected stopword for editing.
	**Delete Stopword** Deletes the selected stopword.

You can also import and export stopwords. Stopword lists are saved as text files with an `.swf` file extension. To exchange stopword lists between projects, importing and exporting stopwords is useful.

4. To import stopwords, click **Import Stopwords.**

   The **Choose Import File** window opens.

5. Select a file to import, and click **Open.**

   The **Info** message appears containing information about how many stopwords were imported. If the imported stopword file contains the same words as the list, no stopwords are exported.

6. To export stopwords in the list, click **Export Stopwords.**
7. To export stopwords, locate the directory and file.
8. Select one of the following export options:

Export options	
Option	**Description**
All stopwords	All stopwords in the project.
Stopwords in the list	Stopwords in the **Stopword** list in the **Stopword Maintenance** window.

9. Click **Export.**

   The confirmation window appears after a successful export.

10. When all necessary changes are made, click **Close.**

Configuring Full Text Search

Before running FTS Server to create the FTS index, the indexes used for each project that uses the full text search must be defined.

Full text search indexes are defined in specific DLL files named **full text search plug-ins.**

To configure full text search for a project, perform the following steps:

1. In the **FTS Maintenance** window, select a project.
2. Click **Setup.**

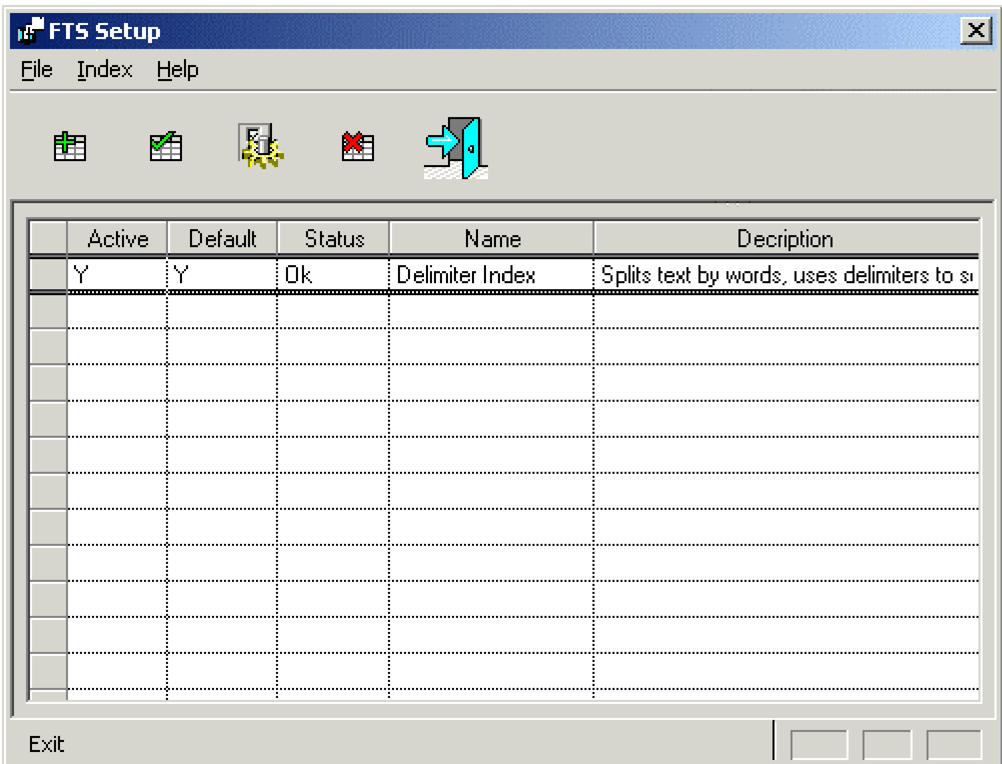
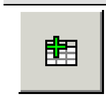
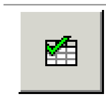
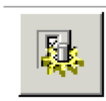
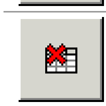
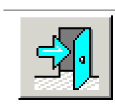


Figure 12: Full Text Search Setup window

The window lists all indexes added to the project. The following table describes **Full Text Search Setup** window index parameters:

Full Text Search Setup window index parameters	
Parameter	**Description**
Active	Flag that shows whether the indexing DLL file is active. If set, the index is created when running FTS Preprocessor and FTS Servers. It is useful to have several indexing DLL files set for the project, but they are not required to be used simultaneously.
Default	Index is used as the default index. The default index defines the algorithm for identifying words in text in the Image Viewer. A default index must be specified to ensure that FTS functions correctly.
Status	Shows whether the indexing plug-in file is loaded successfully.
Name	Index name.
Description	Index description.

3. To maintain the parameters, click the buttons in the toolbar or select the appropriate commands as described in the following table:

<table>
<tr><th colspan="4">Full Text Search Setup window buttons and menu functions</th></tr>
<tr><th>Button</th><th>Shortcut key</th><th>Menu command</th><th>Description</th></tr>
<tr><td></td><td></td><td>Index > Add</td><td>Opens a dialog for adding a new indexing DLL file to create a new index. If there are several indexes in one DLL file, the one that is most appropriate for the project can be selected.</td></tr>
<tr><td></td><td></td><td>Index > Modify</td><td>Opens the Modify Index dialog. The following fields and options can be modified:
<table>
<tr><th>Name</th><th>Description</th></tr>
<tr><td>Name</td><td>Index name.</td></tr>
<tr><td>Description</td><td>Index description.</td></tr>
<tr><td>Active</td><td>DLL indexing file is active.</td></tr>
<tr><td>Set as default</td><td>Index is used as the default.</td></tr>
</table></td></tr>
<tr><td></td><td></td><td>Index > Configure</td><td>Configures the selected index as described in Configuring an Index.</td></tr>
<tr><td></td><td></td><td>Index > Delete</td><td>Deletes the selected index. It is not possible to delete an active index.</td></tr>
<tr><td></td><td>F1</td><td>Help > Context Help</td><td>Opens the help section.</td></tr>
<tr><td></td><td>CTRL+F1</td><td>Help > Help Topics</td><td>Displays a list of available help topics.</td></tr>
<tr><td></td><td></td><td>Help > About Exigen Workflow</td><td>Displays copyright and release information regarding Exigen Workflow.</td></tr>
<tr><td></td><td>F12</td><td>File > Exit</td><td>Closes the FTS Setup window.</td></tr>
</table>

When all indexes are set, FTS Server can be run to create indexes.

Configuring an Index

Exigen Workflow supports the following full text search indexes:

Full text search indexes		
Index	**Plug-in file**	**Description**
Delimiter index	`d32_ftx.dll`	Creates a list of words using the defined delimiters to separate the words.
Alphabet index	`d32_ftx.dll`	Creates a list of words consisting only of the defined alphabet.
Telephone index	`d32_ftxa.dll`	Creates a list of telephone numbers with defined formats.

The following topics describe how to configure each of the full text search indexes:

- Configuring a Delimiter Index
- Configuring an Alphabet Index
- Configuring a Telephone Index

Configuring a Delimiter Index

To configure a delimiter index, perform the following steps:

1. In the **FTS Setup** window, select the delimiter index and click **Configure.**
   The **Index Configuration** window appears.

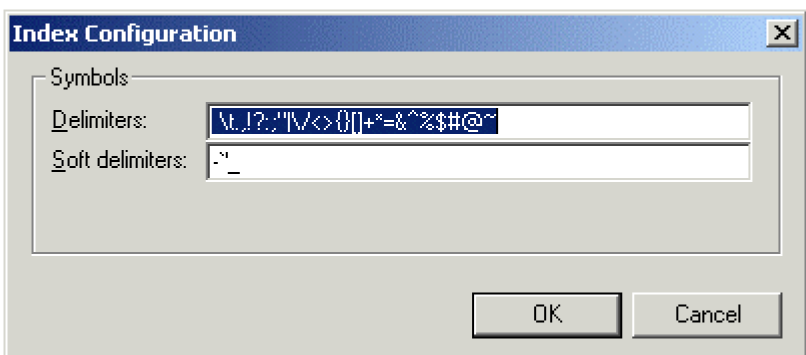


Figure 13: Configuring a delimiter index

2. Enter the required symbols in the following fields:

Index Configuration window fields	
Name	**Description**
Delimiters	Characters recognized as the end of the current word and the beginning of the next one. They are not considered part of the word during the OCR process. The default setting does not recognize punctuation marks or mathematical characters as part of the word.
Soft delimiters	Characters not excluded from a word, for example, *re-created*. If a hyphen is used, all possible words are added to the index. For example, *re-created* adds the following words to the index: *re-created*, *re*, and *created*.

3. To accept the changes, click **OK.**

Configuring an Alphabet Index

To configure an alphabet index, perform the following steps:

1. In the **FTS Setup** window, select the alphabet index and click **Configure.**
   The **Index Configuration** window appears.

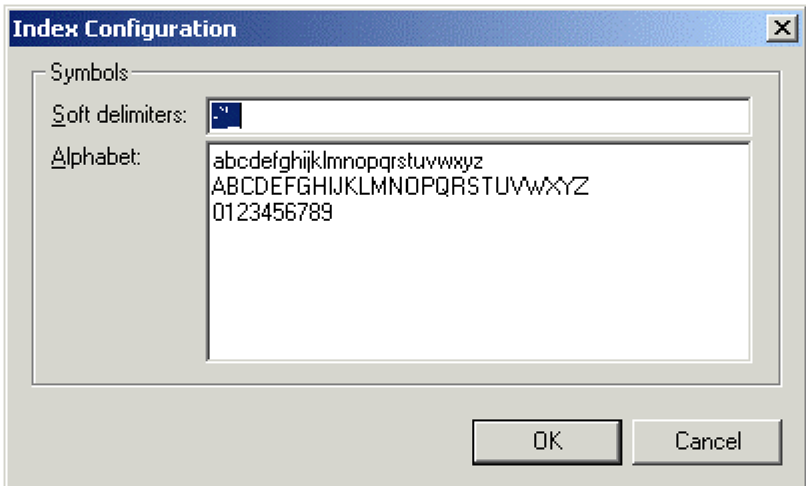


Figure 14: Configuring an alphabet index

2. Enter the required symbols in the following fields:

Index Configuration window fields	
Name	**Description**
Soft delimiters	Characters not excluded from a word, for example, *re-created*. If a hyphen is used, all possible words are added to the index. For example, *re-created* adds the following words to the index: *re-created*, *re*, and *created*.
Alphabet	Set of recognized characters. Words built from characters not defined in this field are not added to the FTS index.

3. To accept the changes, click **OK.**

Configuring a Telephone Index

To configure a telephone index, perform the following steps:

1. In the **FTS Setup** window, select the telephone index and click **Configure.**
   The **Index Options** window appears.

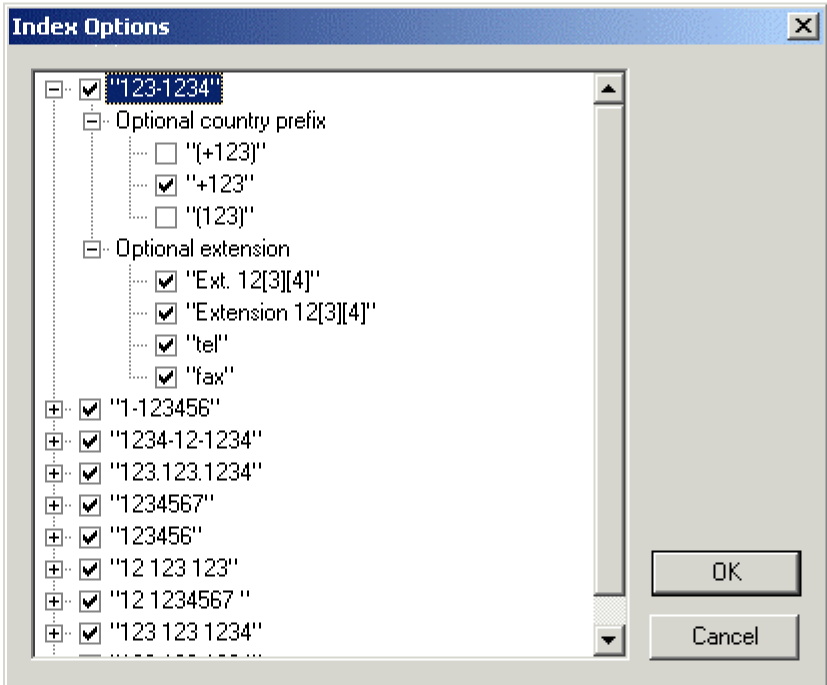


Figure 15: Configuring a telephone index

The **Index Options** window displays all supported telephone number, country code, and extension formats.

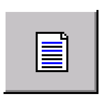
2. Navigate through the tree and define telephone number formats to be recognized by FTS Server by selecting the appropriate check boxes.
3. To accept the changes, click **OK.**

Viewing Erroneous Documents

The erroneous documents list displays documents from the FTS Server that could not be indexed. It is not possible to use the standard error handling mechanism, workflow routing rules, for these documents because the FTS Server does not obtain work from the workflow, but operates in the background.

To view the erroneous documents list, perform the following steps:

1. In the **FTS Maintenance Utility** window, click **Erroneous Documents.**



The **Erroneous documents** window appears.

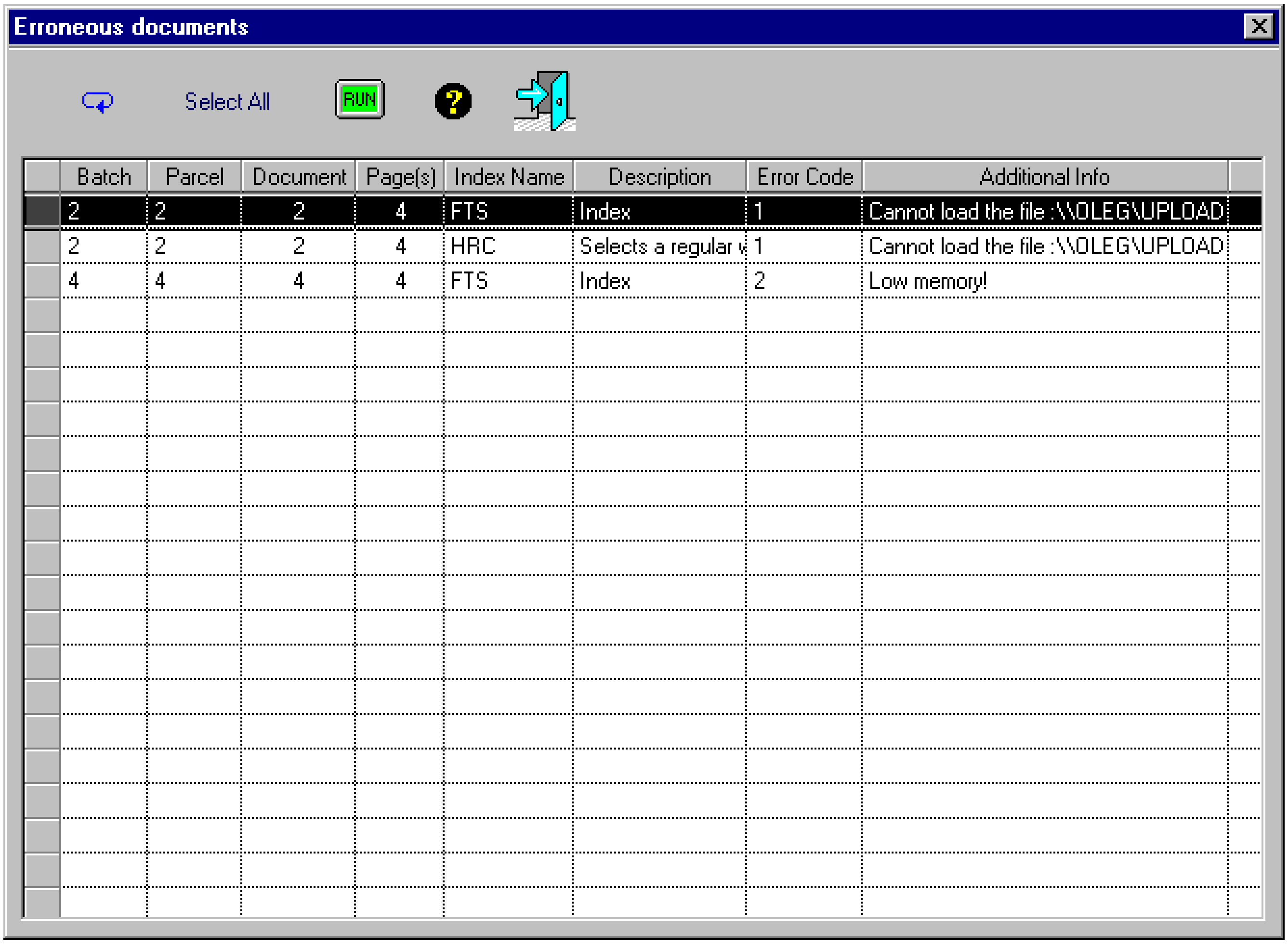


Figure 16: Erroneous documents window

The window lists all documents that failed indexing because they are corrupted or because other errors occurred.

The erroneous documents list does not display FTS Preprocessor errors.

The following table describes the columns displayed in the **Erroneous documents** window:

Erroneous documents window	
Column	**Description**
Batch	Document batch number.
Parcel	Document parcel number.
Document	Document number assigned to the record.
Page(s)	Number of pages in the document.
Index Name	Index name.
Description	Index description.
Error Code	Error code that caused the indexing failure. There are two error code types: • If the file cannot be loaded, usually the file is missing.

Erroneous documents window	
Column	**Description**
	• The memory is low.
Additional Info	Brief description of why the document failed indexing.

2. To update the list, click **Refresh.**
3. Select documents you want to re-index, or use **Select All.**
4. To resend the documents to the FTS Server, click **Reindex Selected Documents.**

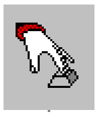
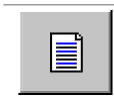
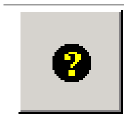
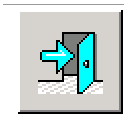
FTS Maintenance Utility Menus and Buttons

This section describes the buttons and menu commands in the following windows:

- FTS Maintenance Window
- Erroneous Documents Window

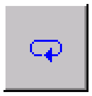
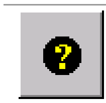
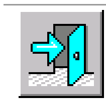
FTS Maintenance Window

The following table describes the **FTS Maintenance** window buttons and menu functions:

FTS Maintenance window buttons and menu functions			
Button	**Shortcut key**	**Menu command**	**Description**
		**File > Setup**	**Setup** Opens the **FTS Setup** window used to set indexes.
		**File > Stopwords**	**Stopword Maintenance** Opens the **Stopword Maintenance** window used to maintain the list of stopwords.
		**File > Erroneous Documents**	**Erroneous Documents** Opens the **Erroneous Documents** window and displays the list of documents that could not be indexed.
	**F1**	**Help > Context Help**	**Context Help** Opens the help section.
	CTRL+F1	**Help > Help Topics**	**Help Topics** Displays a list of available help topics.
		Help > About Exigen Workflow	**About Exigen Workflow** Displays copyright and release information regarding Exigen Workflow.
	**F12**	**File > Exit**	**Exit Application** Closes the **FTS Maintenance** window.

Erroneous Documents Window

The following table describes the **Erroneous Documents** window buttons and menu functions:

Erroneous Documents window buttons and menu functions		
Button	**Shortcut key**	**Description**
	**F5**	**Refresh List** Updates the list of erroneous documents.
		**Select All Documents** Selects all documents in the list.
		**Reindex Selected Documents** Sends selected documents for reindexing.
	**F1**	**Help** Opens the help section for this application.
	**F12**	**Exit** Closes the **Erroneous Documents** window.

Chapter 6: Orphan Utility

This section explains how to search for image files with no corresponding database records. The following topics are described in this section:

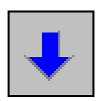
- Overview
- Using the Orphan Utility Window
- Orphan Utility Menus and Buttons

Overview

Orphan Utility is used to locate discrepancies between the image directories and the database. Orphan Utility lists DMS image files that do not have matching database records in the document table. Only valid DMS image files having a file name consisting of eight digits and the `.DMS` extension are displayed. These files can be routed to a specific queue where parcel records are generated for them and they can be reviewed and processed.

Using the Orphan Utility Window

To start Orphan Utility, in the **Exigen Workflow Explorer** window, select the **Utilities** folder and double-click **Orphan Utility.**



The **File Orphan Utility** window appears.

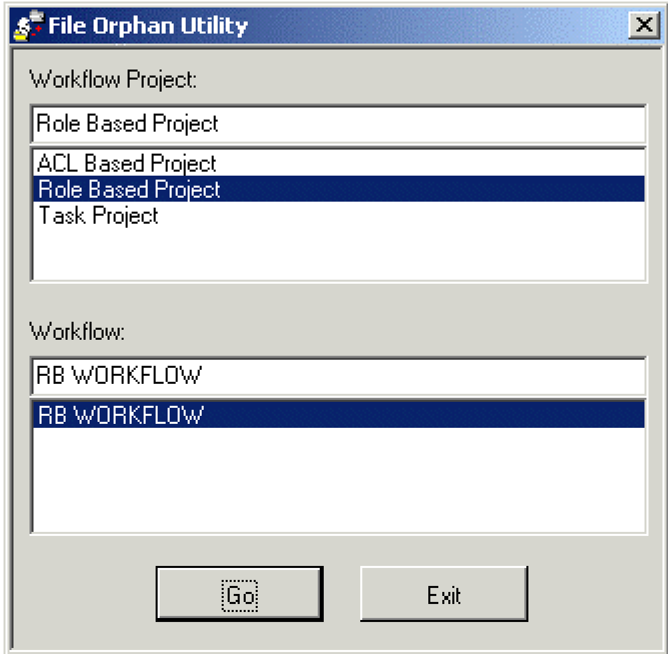


Figure 17: File Orphan Utility window

The **Workflow Project** list displays all projects registered in the database. The **Workflow** list displays all workflow applications assigned to the selected project.

To use Orphan Utility, perform the following steps:

1. In the **Workflow Project** list, select a project to check.
2. In the **Workflow** list, select an application.
3. To start the check, click **Go.**
   The **Orphan Utility** window appears.
4. To cancel the check, click **Exit.**

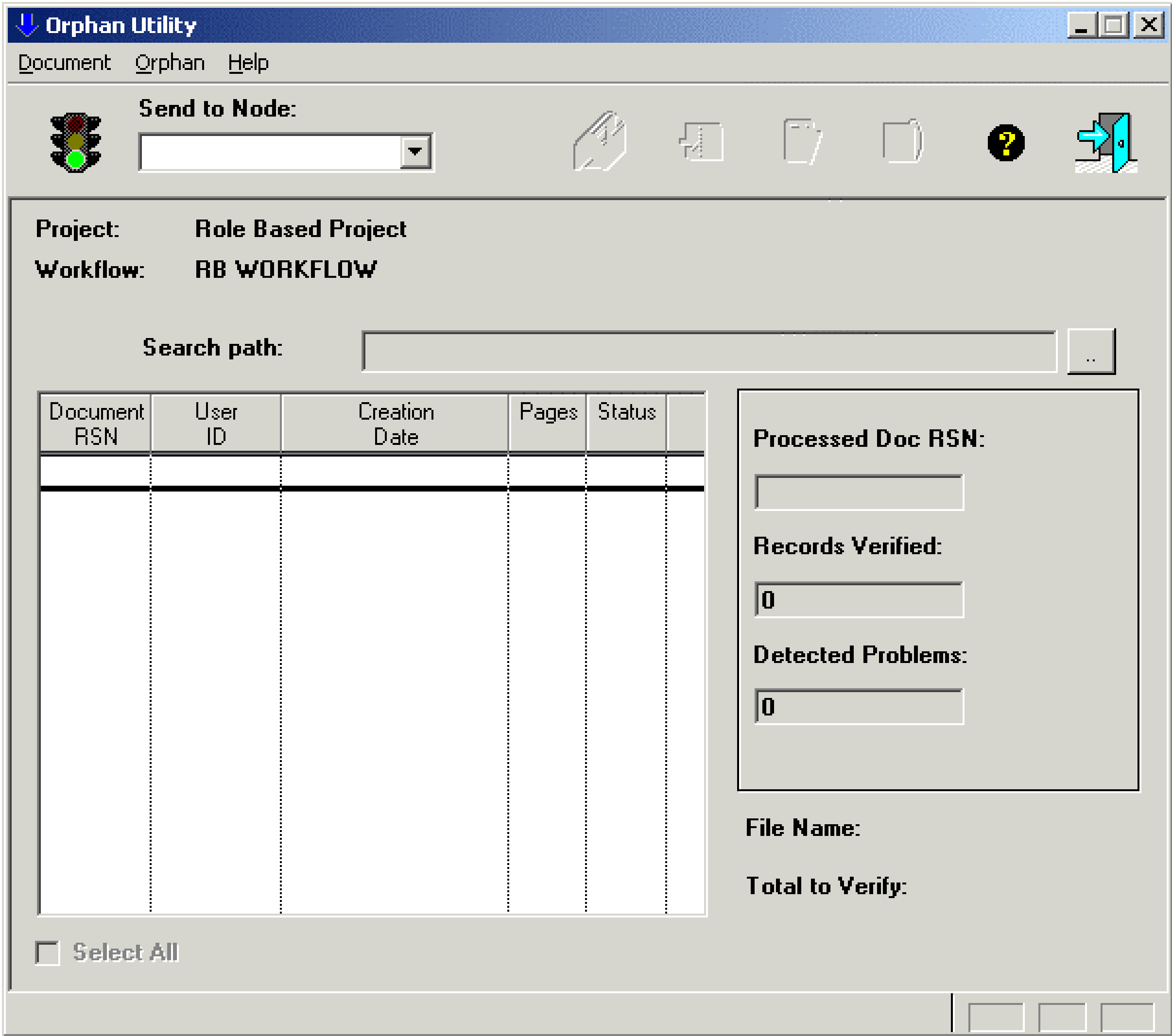


Figure 18: Orphan Utility window

The **Orphan Utility** window contains the following options and features:

- Menu and button bars are described in Orphan Utility Menus and Buttons.
- The **Send To Node** combo box displays all nodes in the selected workflow.
- The selected project and workflow are displayed below the button bar.
- The search path specifies the directory that is tested.
- A table displays retrieved document attributes and process information.

To check the image files in the selected project and workflow, perform the following steps:

1. In the **Send To Node** combo box, select the node where you want to send the orphan files.
2. To specify the directory to be checked for orphan files, click the browse button to the right of the **Search Path** field.
3. Click **Start.**

The verification process begins.

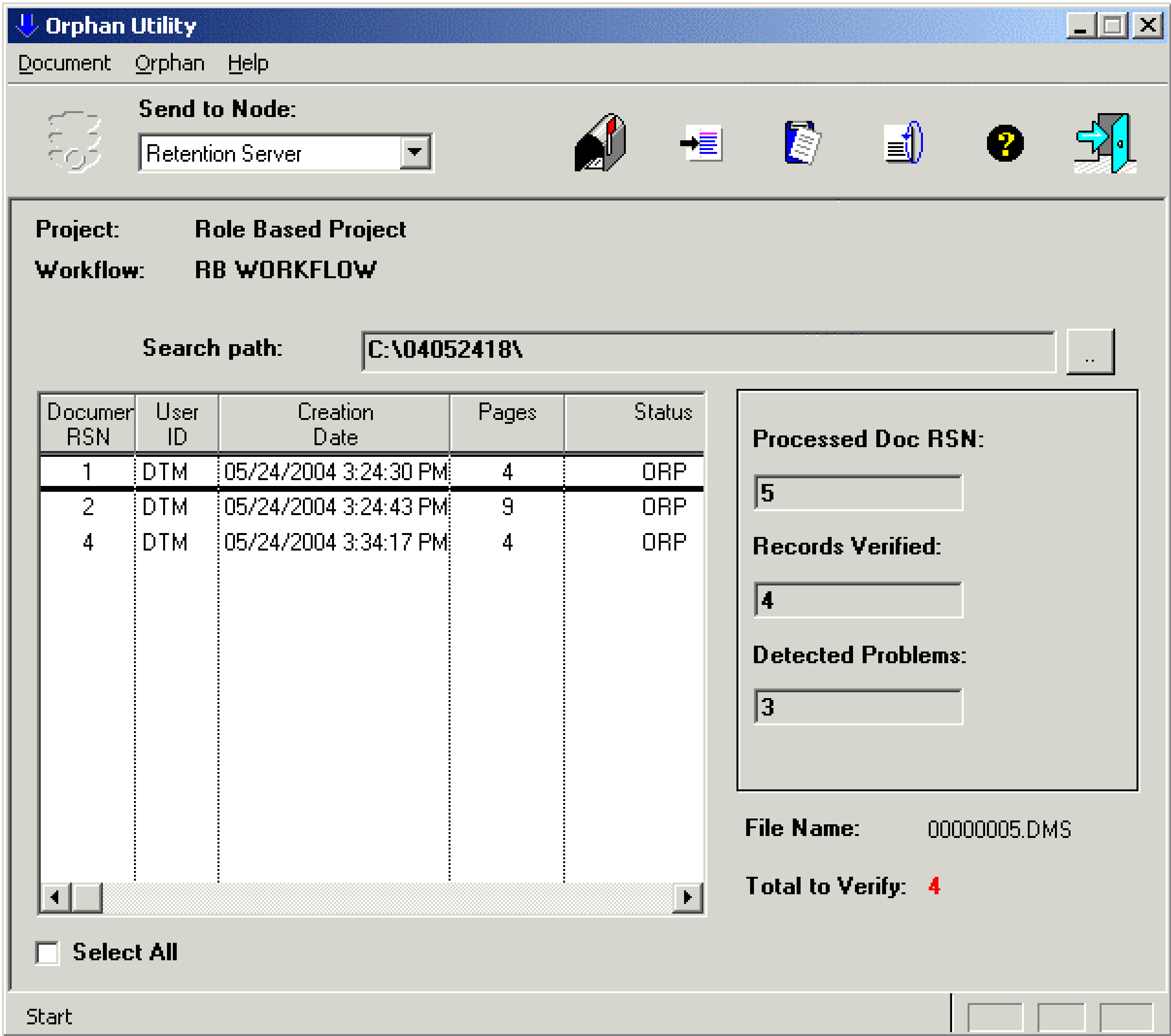


Figure 19: Orphan Utility window with processed data

The following fields are displayed while the process is running:

Orphan Utility, processed data fields	
Field	**Description**
Processed DOC RSN	Last document number processed.
Records Verified	Total number of verified records.
Detected Problems	Number of orphaned files.
File Name	Name of file being processed.
Total to Verify	Number of files in the search path directory.

When the utility verifies the database records for the image files in the search path, image files without corresponding database records are displayed in the results table. Only valid DMS image files having a file name consisting of eight digits and the `.DMS` extension are displayed. The following are examples of valid DMS image file names:

- `00030006.DMS`
- `00000127.DMS`

The results table displays the following information:

Results table	
Column name	**Description**
Document RSN	Document number.
User ID	User ID of the person who scanned the document.
Creation Date	Document creation date.
Pages	Number of pages in the document.
Status	Document status. The status of all image files located by this utility is **ORP.**

Because the image files do not have database records associated with them, you must use the **Send** function to send them to a specific node. Once the **Send** function is started, parcel and document records are created in the database for these image files. This allows the recipient to view and route them accordingly.

To work with Orphan Utility, perform the following steps:

1. To send documents, click **Send.**
2. To send all documents, select **Select All** and click **Send.**
   The orphan records remain in the window. When the send process is complete, the status changes to **Send.**
3. To stop the process at any time during the send process, click **Stop.**
4. To view an image file, highlight the records and click **Display.**
5. To produce a report listing all records in the results window, click **Report.**
   The **Centura Report Builder** application opens.

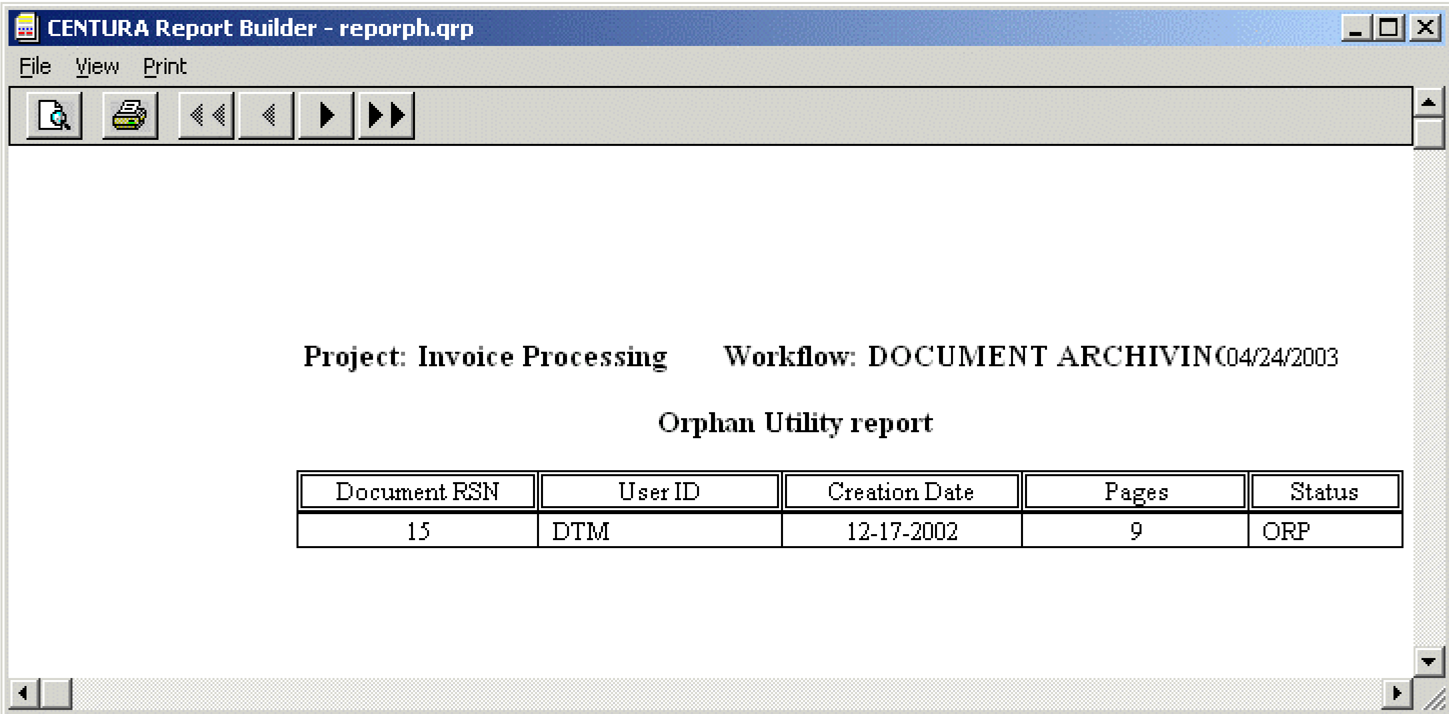
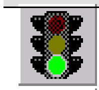
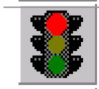
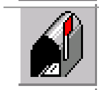
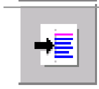
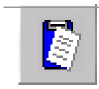
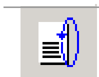
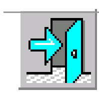


Figure 20: CENTURA Report Builder window

6. To reset the **Orphan Utility** window, click **Clear.**

Orphan Utility Menus and Buttons

The following table describes the **Orphan Utility** window button and menu functions:

Orphan Utility window buttons and menu functions			
Button	**Shortcut key**	**Menu command**	**Description**
		**Orphan > Start**	**Start** Starts the Orphan Utility process.
		**Orphan > Stop**	**Stop** Stops the Orphan Utility process.
	**CTRL+S**	**Document > Send**	**Send Document** Sends all selected documents to the assigned node.
	**CTRL+D**	**Document > Display**	**Display Document** Displays the selected image file in the Image Viewer on the right side of the window.
	**CTRL+R**	**Document > Report**	**Report** Saves the list of orphan documents in a report that can be displayed and printed via the Centura Report Builder.
		**Orphan > Clear**	**Clear** Clears all entries in the results portion of the window.
	**F1**	**Help > Context Help**	**Context Help** Opens the help section.
	CTRL+F1	**Help > Help Topics**	**Help Topics** Displays a list of available help topics.
		Help > About Exigen Workflow	**About Exigen Workflow** Displays copyright and release information regarding Exigen Workflow.
	**F12**	**Document > Exit**	**Exit** Closes the **Orphan Utility window**.

Chapter 7: Stamp Management Utility

This section explains how to create electronic stamps in Exigen Workflow. The following topics are described in this section:

- Overview
- Using the Stamp Management Window
- Creating or Modifying Stamps
- Stamp Management Utility Menus and Buttons

Overview

Exigen Workflow supports an electronic stamp tool.

Stamp Management Utility is used to create and maintain electronic stamps to overlay onto documents. The following table describes methods for creating stamps:

Stamp creation methods	
Name	**Description**
Scanning	Document is scanned and an area to be used as a stamp is selected.
Loading from existing file	File in DMS or TIFF format is opened and the area to be used as a stamp is specified. Only monochrome images can be used to define stamps.

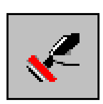
Note: Exigen Workflow supports the most efficient type of compression for TIFF files, CCITT Group4 compression. Using TIFF files that are compressed in a different way leads to undesirable results.

After the electronic stamps are created, the administrator grants permission for the user to apply the stamps by selecting **Administrator > System Setup > Stamps.** The user can apply electronic stamps to documents by selecting **Image Viewer > Stamp.** For more information on Image Viewer, see the *Exigen Workflow User's Guide,* Chapter 11: Image Viewer.

Using the Stamp Management Window

To create or modify electronic stamps, perform the following steps:

1. In the **Exigen Workflow Explorer** window, select the **Utilities** folder and double-click **Stamp Management.**



The **Stamp Management** window appears.

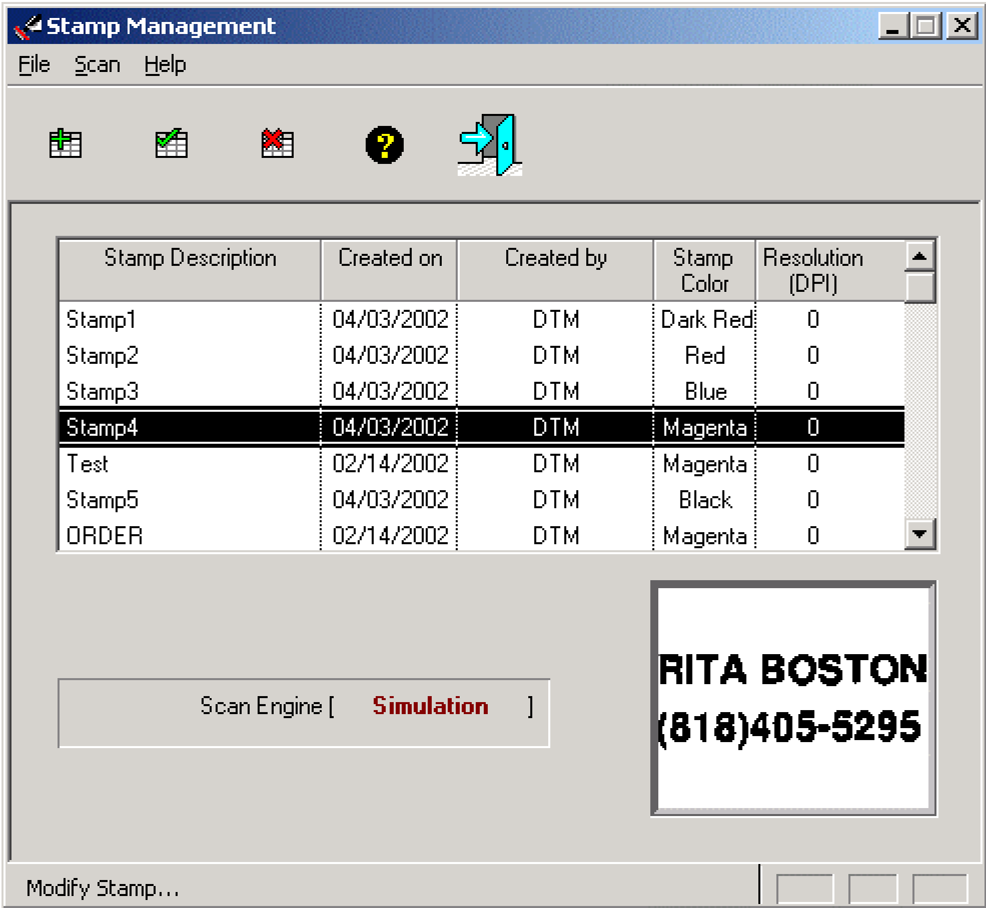


Figure 21: Stamp Management Utility window

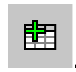
The **Stamp Management** window contains the following information:

- menu and button bars as described in Stamp Management Utility Menus and Buttons.
- table containing data of the existing stamps in the system:

Stamp Management, existing stamp data	
Column	**Description**
Stamp Description	Names of existing stamps in the system.
Created on	Date the stamp was created.
Created by	User who created the stamp.
Stamp Color	Color to be used for the stamp.
Resolution (DPI)	Resolution with which the stamp was scanned.

- Buttons at the lower left are used for the following tasks:
  - create
  - modify
  - delete
- The selected stamp is displayed on the right.

- The **Scan Engine** field displays the scanning device used to create a stamp.

2. To remove a stamp from the system, select it and click **Delete Stamp** .
3. To modify an existing stamp, select the stamp and click **Modify Stamp** .
4. To add a new stamp to the system, click **New Stamp** .
   The Image Viewer appears on the right and the **Create/Modify Stamp** window appears on the left.

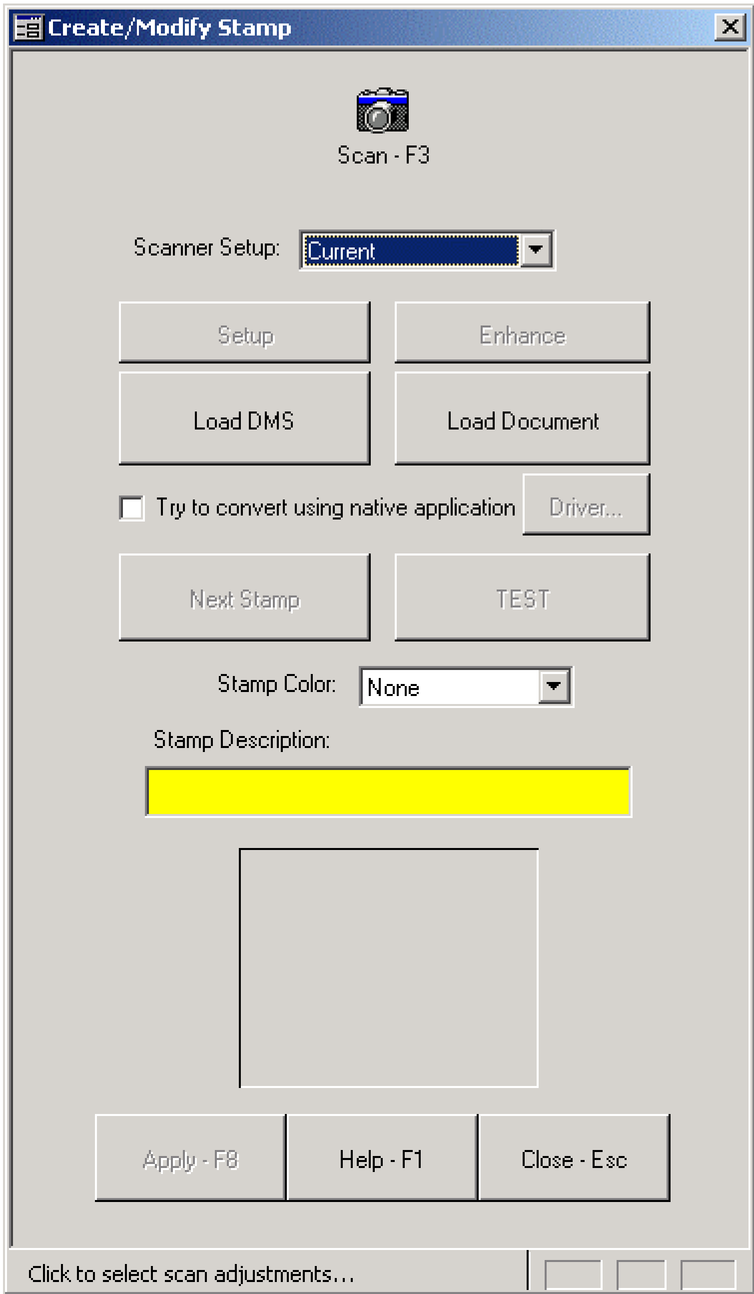


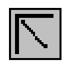
Figure 22: Create/Modify Stamp window

Creating or Modifying Stamps

To create a stamp, perform the following steps:

1. To set up the scanner, click **Setup** and **Enhance.**
2. Click **Scan-F3** or press **F3.**
3. To create a stamp from an existing DMS file, click **Load DMS.**
4. To create the stamp from a TIFF image file, click **Load Document.**
   Regardless of its origin, the image file appears in the Image Viewer.

   When you move the pointer over the image, it changes into the OCR tool:

   To use the **Try to print from native application** feature, a specialized printer driver that is used for conversion into TIFF format must be installed.

   The NED Image Printer installation is available in the install directory under the Exigen Workflow root directory.

5. If the documents are one of the following file types, select the **Try to convert using native application** check box:
   - DOC
   - RTF
   - XLS
   - PDF

   Selecting this check box enables the native application such as Word for DOC and RTF and Excel for XLS to convert documents to DMS format.

   The **Driver** button is enabled.

6. To open the **Driver Setup** window for selecting and configuring the print driver, click **Driver.**
   An appropriate printer driver must be installed, such as one of the following:
   - Informatik Image Driver
   - NED Image Printer
     NED Image Printer is a base driver. The NED Image Printer driver port name length cannot exceed five characters.

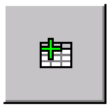
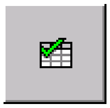
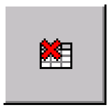
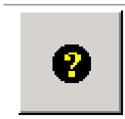
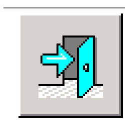
Note: NED Image printer has to be installed before printing Office and PDF files.

7. To configure the print driver, click **Properties** to export appropriate types of images such as A4, monochrome, or color TIFF.
   If you are using an NED printer driver, observe the following restrictions:
   - Do not select a print quality of 100x100 dpi for color images.
   - Ensure sufficient free hard drive space is available when printing color documents, for example, up to 10 MB per page for a resolution of 200x200 dpi.
   - Ensure Excel files are printed only at a DPI resolution of 600x600.

8. To select the area to use for the stamp, position the pointer at the top-left corner of the area you want to use for the stamp, click and drag to the lower right, and release the mouse button.
   The selected area is displayed in the lower part of the **Create/Modify Stamp** window.
9. In the **Stamp Description** field, enter the name of the stamp.
10. In the **Stamp Color** list box, select the color for the stamp.
11. To see how the stamp looks when applied, click **Test.**
    The stamp appears in the top-left corner of the image.
12. To complete the stamp, click **Apply** or press **F8.**
13. To create another stamp, click **Next Stamp.**
14. To close the **Create/Modify Stamp** window, click **Close - Esc.**

Stamp Management Utility Menus and Buttons

The following table describes the **Stamp Management Utility** window button and menu functions:

Stamp Management Utility window buttons and menu functions			
Button	**Shortcut key**	**Menu command**	**Description**
		**File > New Stamp**	**New Stamp** Opens the **Create/Modify Stamp** window to create a new stamp.
		**File > Modify Stamp**	**Modify Stamp** Opens the **Create/Modify Stamp** window to modify the selected stamp.
		**File > Delete Stamp**	**Delete Stamp** Deletes the selected stamp.
		File > Delete All	**Delete All Stamps** Deletes all stamps.
		File > Optimize	**Optimize Stamp Storage** Removes all traces of deleted objects from the DMS file.
		File > Recovery	**Recovery Stamp Storage** Performs recovery operations. This option is used if your last session was interrupted, for example, your computer was rebooted without first closing the application. This operation removes changes made in that session while preserving information entered previously.
		Scan > Select Scan Engine	**Select Scan Engine** A scan device is selected from the list of available ones.
	**F1**	**Help > Context Help**	**Context Help** Opens the help section.
	CTRL+F1	**Help > Help Topics**	**Help Topics** Displays a list of available help topics.
		Help > About Exigen Workflow	**About Exigen Workflow** Displays copyright and release information regarding Exigen Workflow.
	**F12**	**File > Exit**	**Exit** Closes the **Create/Modify Stamp** window.

Chapter 8: Template Management Utility

This section explains how to create Forms Overlay and Forms Optical Character Recognition templates. These templates are used to display and populate database information based on the types of documents being scanned into the system. This section also describes how to assign document templates to projects.

The following topics are described in this section:

- Overview
- Using the Template Management Utility Window
- Creating a Template
- Defining OCR and Overlay Zones
- Assigning a Document Template to a Project
- Template Management Utility Menus and Buttons

Overview

Template Management Utility is used for the following tasks:

- Creating templates for Forms Overlay processing. **Forms Overlay** defines zones on a template where data is placed. Data imported from a text or by other means into the database is overlaid onto an existing template when the Image Viewer is launched. To end users it appears as if the document they are viewing was originally scanned into the system.
- Creating templates for Forms Optical Character Recognition (OCR) processing. **Forms Optical Character Recognition,** or **Forms OCR,** defines zones on a template where data is extracted. This data is used to populate database fields depending on the zone data and Forms OCR Server configuration.
- Assigning document templates to projects. Document templates are draft documents that can be applied when a user processes a task using an external application.

Using the Template Management Utility Window

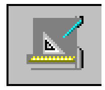
Template Management Utility is used to capture template files and define the zones to be overlaid or extracted. Templates can either be scanned in as new DMS files, or attached as existing DMS or other types of image files.

The following topics are described in this section:

- Opening Template Management Utility
- Using the General Tab
- Using the Detail Tab

Opening Template Management Utility

To open Template Management Utility, in the **Exigen Workflow Explorer** window, select the **Utilities** folder and double-click **Template Management Utility.**



The **Template Management Utility** window appears.

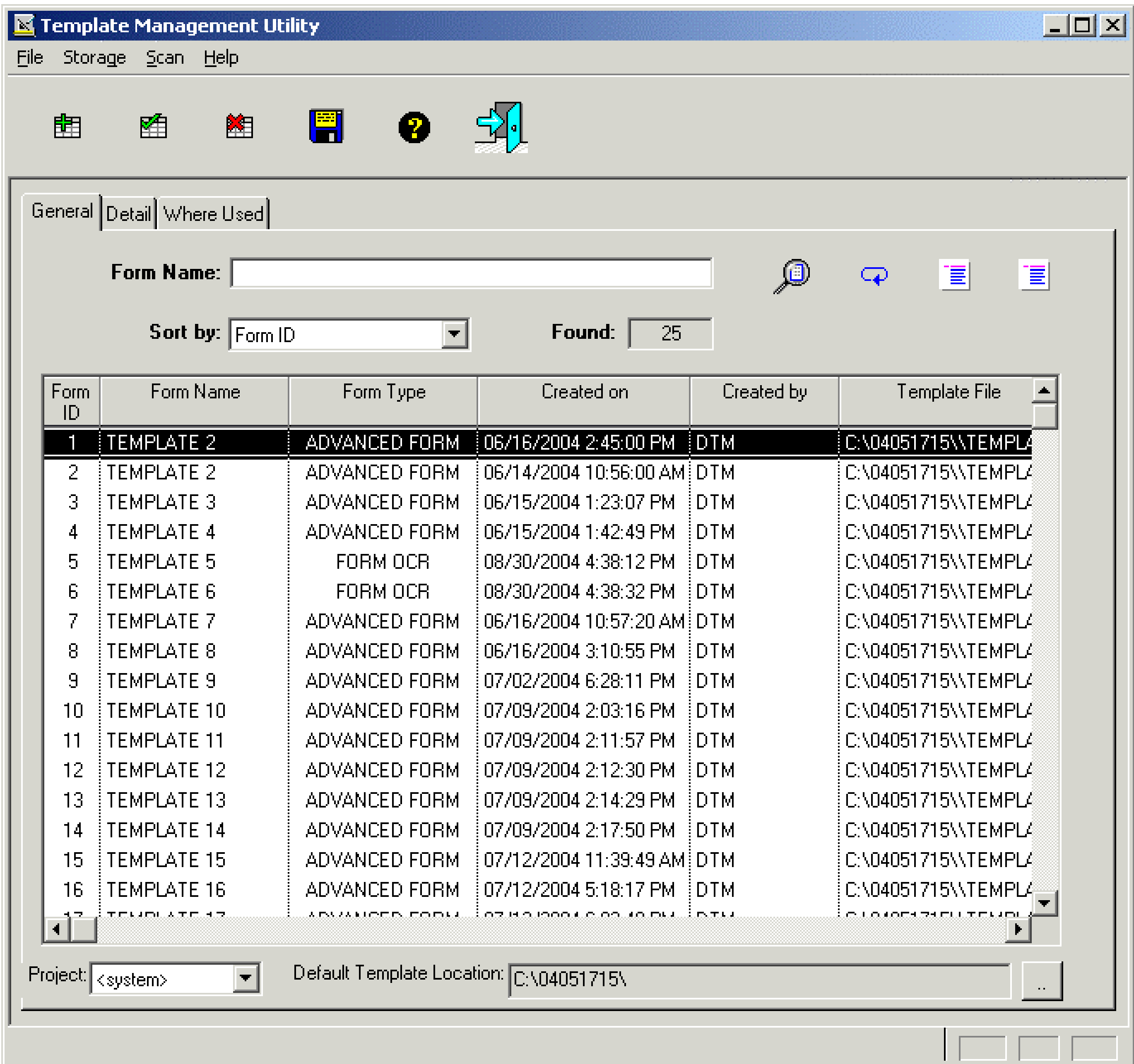


Figure 23: Template Management Utility window with General tab

The **Template Management Utility** window contains the following tabs:

- **General**
- **Detail**
- **Where Used**

Only the **General** and **Detail** tabs apply to Forms OCR Processing. The **Where Used** tab is used to view the projects in which the selected template appears.

Menu commands and buttons are described in Template Management Utility Menus and Buttons.

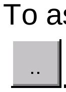
Using the General Tab

The **General** tab lists all form templates that are created in the database. The list can be modified.

The list of form templates contains the following information:

Template Management Utility window, General tab, list of form templates	
Column	**Description**
Form ID	Internal identification number generated when the template was created.
Form Name	Name given to the template when it was created. The name can be up to 32 characters long and must clearly identify the form it is used for.
Form Type	Form type. They are either OCR or Overlay template.
Created on	Template creation date.
Created by	Person who created the template.
Template File	Path to the actual template DMS file. Each template file is named *TEMPLATE.###* with ### representing the Form ID with leading zeros to create a three character file extension.

To use the **General** tab, perform the following steps:

1. To modify an existing template, in the list, highlight it and click **Modify.**
   The **Form Template Maintenance** window appears.
2. In the **Form Template Maintenance** window, modify template zones and their attributes.
3. To remove the selected template from the system, click **Delete.**
4. To create a new form template, click **New.**
   For information on creating a new template, see Creating a Template.
5. To assign the **Default Template Location,** click **Browse** and select a location
   .
   If the location is not configured, a corresponding message appears.
6. To save the selected template path in the `visi.ini` file in the Exigen Workflow `System` directory, click **Yes.**
   All subsequent templates created are located in this directory.

7. Ensure that the template directory location is set in Administrator Utilities in the following location:
   Workflow Tools > Administrator > System Setup > Locations Setup
8. To find a desired template in the form list, in the **Form Name** field, enter all or a portion of the form name and click **Find.**
   All forms that meet the search criteria are displayed. The **Found** field displays the total number of form records matching the search criteria.
9. To display all forms, click **Refresh.**
10. To change the sort order of the list, select the desired sort key from the **Sort By** list box.
    The default sort order is by Form ID value.
11. To display a specific form and the zones assigned in the template, highlight the record and click **Display.**

Using the Detail Tab

To use the **Detail** tab, perform the following steps:

1. To view zone details about a specific template, highlight the template and select the **Detail** tab**.**

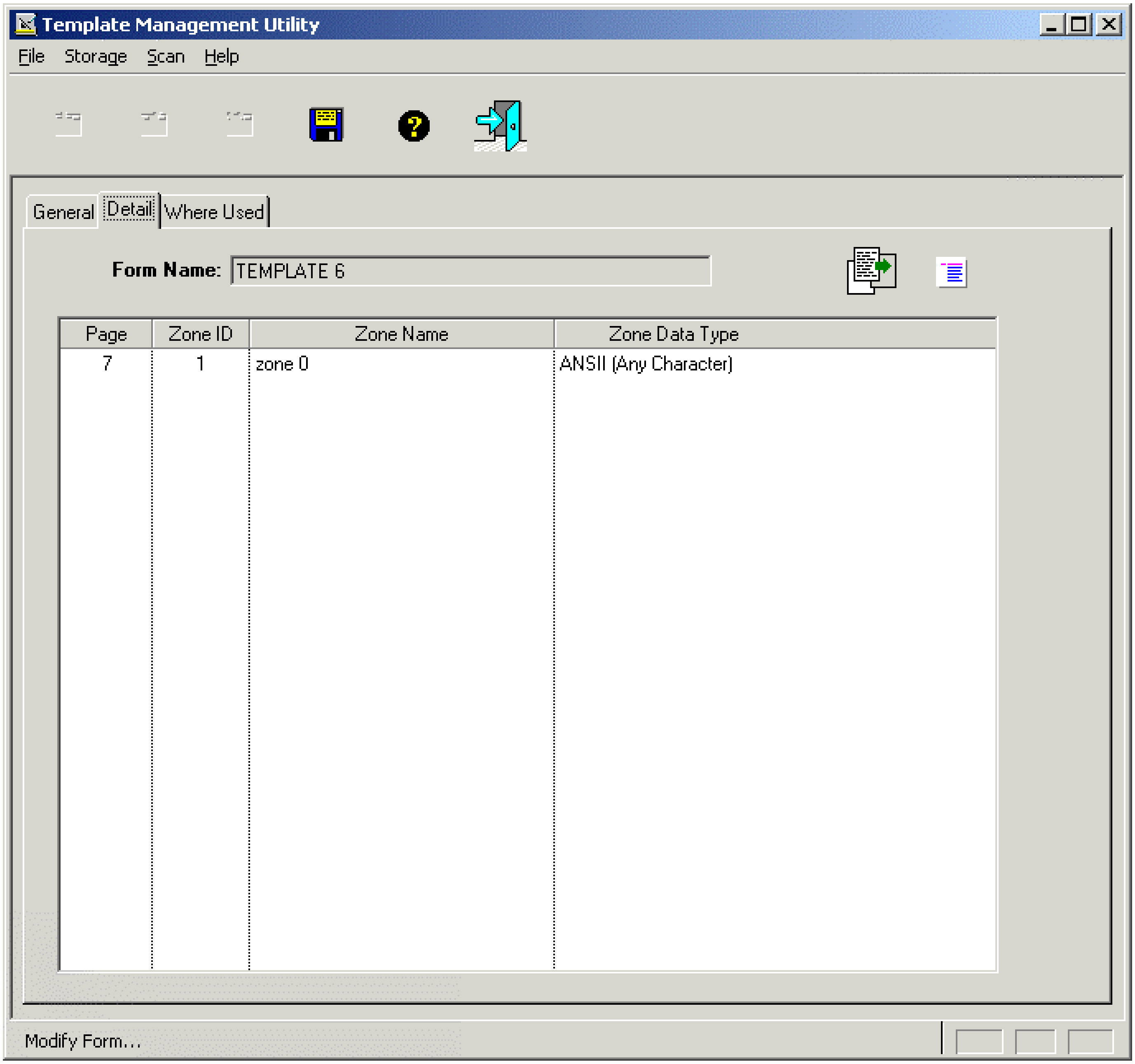


Figure 24: Template Management Utility window with Detail tab

The selected form name is displayed at the top of the window. The table displays the following data:

Template Management Utility window, Detail tab	
Column	**Description**
Page	Zone page number.
Zone ID	Zone internal identification number.
Zone Name	Zone name.

Template Management Utility window, Detail tab	
Column	**Description**
Zone Data Type	Zone data type.

2. To view the entire template and all zones, click **Show All.**
   All zones in the template are displayed.
3. To view a specific zone, highlight the zone record in the table and click **Display.**
   The specified zone is displayed.

Creating a Template

The following topics are described in this section:

- Creating a New Form Template
- Scanning a New Form
- Creating a New Form from the Existing File
- Saving Zones to a File

Creating a New Form Template

To create a new form template, perform the following steps:

1. Select the **General** tab.
2. In the **Template Management Utility** window, click **New** .
   The **Form Template Maintenance** window appears with the **Preparation** tab displayed.

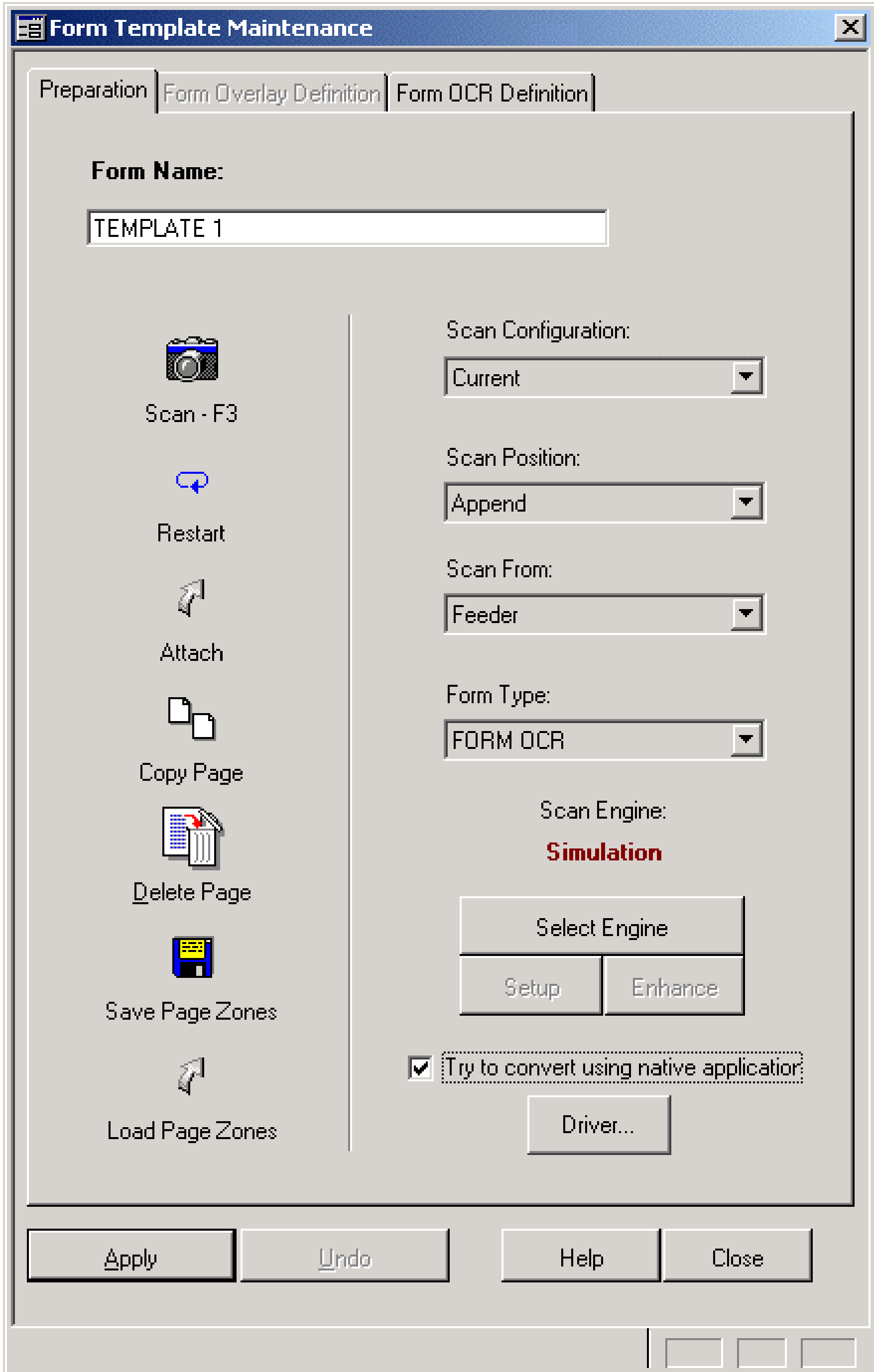


Figure 25: Form Template Maintenance window with Preparation tab

The **Preparation** tab is used to scan in a new DMS file or retrieve an existing one that is used to create the new template.

When the window is launched, a default template name is applied. The name consists of the word *Template* followed by the numeric form ID and cannot be changed until the image file is scanned or loaded.

Scanning a New Form

To create a form template from a newly scanned image, perform the following steps:

1. Click **Select Engine** and select the appropriate scan engine from the list.
2. Click **Setup.**

   The available settings depend on which scan engine is selected.
3. After you configure and save the scanner settings, in the **Scan Config** list box, select the necessary configuration from the predefined settings.
4. To use the **Try to print from native application** feature, ensure a specialized printer driver that is used for conversion into TIFF format is installed.

   NED Image Printer installation is available in the install directory in the Exigen Workflow root directory.
5. If your documents are one of the following file types, select the **Try to print from native application** check box:
   - DOC
   - RTF
   - XLS
   - PDF

   Selecting this check box enables the native application such as MS Word for DOC and RTF and MS Excel for XLS to convert documents to DMS format.

   The **Driver** button is enabled.
6. To open the **Driver Setup** window for selecting and configuring the print driver, click **Driver.**

   An appropriate printer driver must be installed, such as one of the following:
   - Informatik Image Driver
   - NED Image Printer

     NED Image Printer is a base driver. The NED Image Printer driver port name cannot exceed 5 characters.
7. To configure the print driver, click **Properties** to export appropriate types of images such as A4, monochrome, or color TIFF.

   If you are using an NED printer driver, observe the following restrictions:
   - Do not select a print quality of 100x100 dpi for color images.
   - Ensure sufficient hard drive space is available when printing color documents, for example, up to 10 MB per page for a resolution of 200x200 dpi.
   - Ensure Excel files are printed only at a DPI resolution of 600x600.
8. To perform additional scanning enhancements, click **Enhance.**

Note: **Setup** and **Enhance** are enabled only if a scanner is connected to the system. Enhance features work only with a Kofax driver version and a scanner that supports the enhance functionality.

The **Scan Position** list box is used to notify the system where the new page appears in the selected document.

9. To place the new page at the end, in the list, select **Append.**

10. To place the new page before an existing page, scroll through the document until the existing page is displayed in the viewer and in the list, select **Before.**
11. To place a page after an existing page, scroll through the document until the existing page is displayed and in the list, select **After.**
12. To replace an existing page, scroll through the document until the existing page is displayed and in the list, select **Replace.**
13. In the **Scan From** list box, select **Feeder** or **Flat Bed,** depending on the type of feeder you are using.
14. To begin scanning, click **Scan-F3** or press **F3.**
15. When all pages are scanned, in the **Form Name** field, change the form name.

    The name must reflect the purpose of the form to facilitate selection of the template during the Forms OCR or ERM Server configuration process.

16. To copy a page within the scanned form, display the page in the Image Viewer and click **Copy Page.**

    The page is pasted into the form at the position specified in the **Scan Position** field.

17. To remove a page, display the page and click **Del Page.**

Before you create zones for the template, it is a good idea to clean the scanned document by removing scanning defects. Cleaning the document is done by using filters and other enhancement tools to ensure zones are clearly defined.

To clean the document, perform the following steps:

1. To use the **Filter** service, in the Image Viewer, select the **Filter** check box.

   This check box is located to the right of the **Magnify** check box.

2. Open the **Edit Tools** window and click **Filters.**

For information on Image Viewer, see the *Exigen Workflow User's Guide*, Chapter 11: Image Viewer.

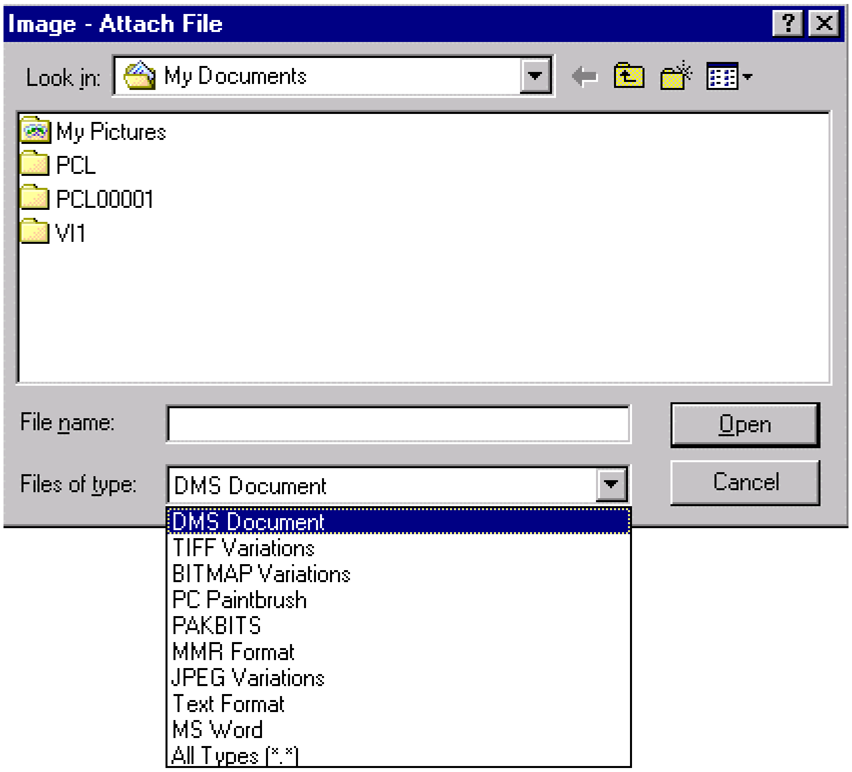
Creating a New Form from the Existing File

To create a form template from an existing file, perform the following steps:

1. Click **Attach.**

Note: Only VCET Engine supported file types can be used.

The **Image - Attach File** window appears.



2. Locate the desired file and click **Open.**
   The selected file appears in the Image Viewer.

Note: As a result of VCET conversion, DOC files appear black and white.

Saving Zones to a File

To save zones set up on a template to a file, perform the following steps:

1. Click **Save Page Zones.**
   The **Save Page Zone Template** window appears. It allows a file with the extension `.pzn` to be saved in the selected directory.
2. To assign saved zones to a new template, click **Load Page Zones.**
3. Select the zone file you want to apply to the new template and click **Open.**

Defining OCR and Overlay Zones

To enable the **Form Overlay Definition** or **Form OCR Definition** tab, select one of the following options from the **Form Type** list box:

- **OVERLAY**
- **FORM OCR**

The following topics are described in this section:

Form Overlay Definition

The **Form Overlay Definition** tab is used to configure the location and appearance of the database information that is overlaid onto the form.

The **Form Overlay Definition** window appears with the template displayed on the right side of the window in the Image Viewer.

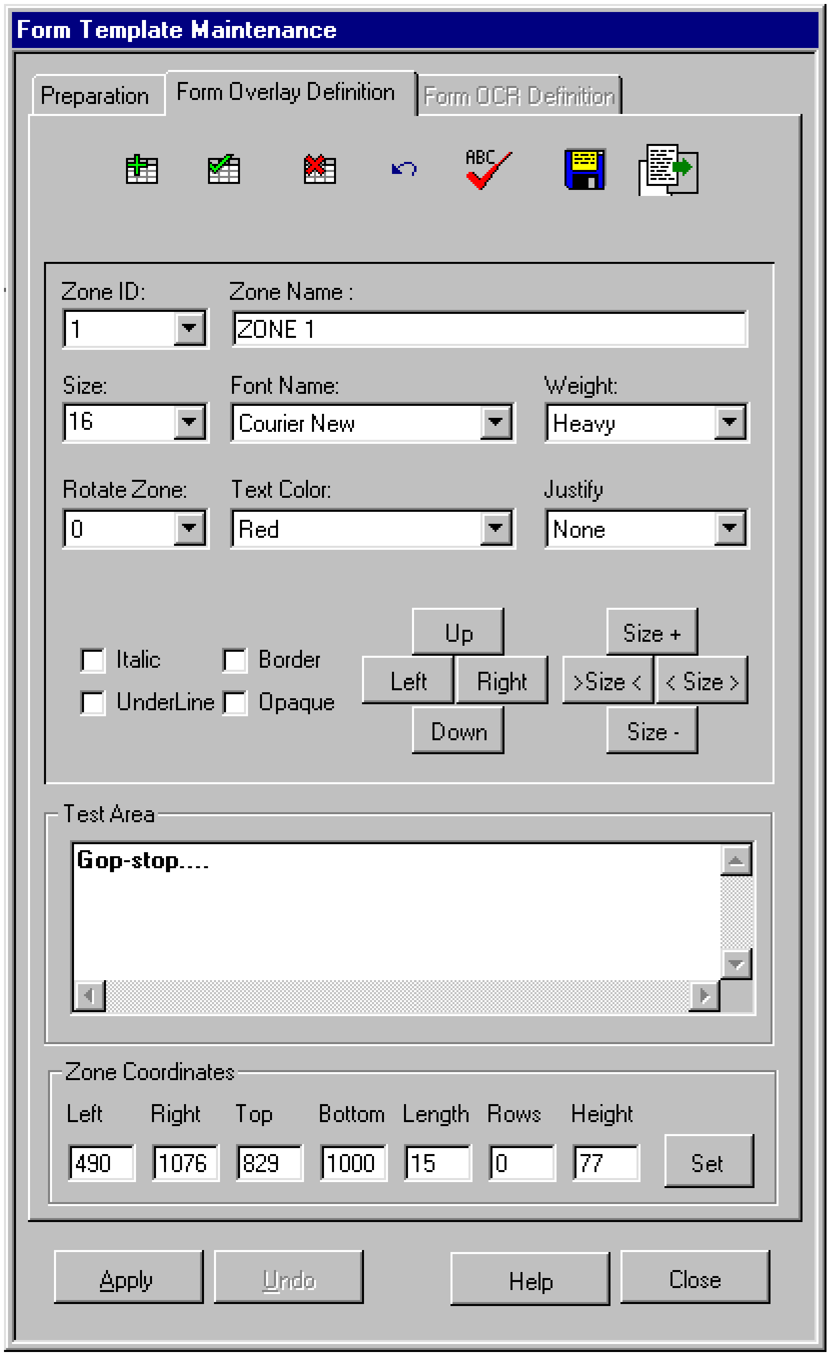


Figure 26: Form Template Maintenance window with Form Overlay Definition tab

This section describes how to add a zone to a template using the following procedures:

- Defining a Zone
- Modifying and Deleting a Zone
- Testing and Saving a Zone

Defining a Zone

To define a zone, proceed as follows:

1. Click **New.**

   The cursor changes to the Zone tool.

2. Position the new cursor at the top left corner of the area being defined as the zone.
3. Click and drag to the lower right corner of the area.

   A box appears while the cursor is dragged.

4. When the zone is completely outlined, release the mouse button.

   The **Zone ID** is generated when a new zone is added to the template.

Modifying and Deleting a Zone

To modify or delete a zone, proceed as follows:

1. To modify an existing zone, in the **Zone ID** list box, select the appropriate zone and click **Modify.**
2. To delete an existing zone, in the **Zone ID** list box, select the appropriate zone and click **Delete.**
3. In the **Zone Name** field, enter a descriptive title for the current zone.

   This name is used during the ERM Server setup to define the database fields used to populate this zone.

4. To specify how the data is displayed when overlaid, make appropriate selections in the following list boxes:
   - Size
   - Font Name
   - Weight

   Different fonts appear in different sizes.

5. Before saving a template, test all fonts.
6. In the **Rotate** list box, select the angle of rotation for the overlaid text.

   The following options are available:

   - **0**
   - **90**
   - **180**
   - **270**

   The **Text Color** list box is used to define the color in which the overlaid text appears.

   Unless you are using a color printer, the text is printed in black.

   The **Justify** list box is used to specify the placement of a zone around selected text. The **Justify** list box setting must be specified before the zone is drawn.

7. To specify the placement of a zone around selected text, select one of the following options in the **Justify** list box:

Justify list box	
Option	**Description**
None	Zone remains at its original position.
Left Justify	Zone is positioned so that the selected text is justified left.
Right Justify	Zone is positioned so that the selected text is justified right.
By Example	Zone is resized to match the selected text exactly.

8. To assign additional formatting to alter the overlaid text appearance, select any of the following formatting options:

Additional formatting options	
Check box	**Description**
Italic	Displays the text in italics.
Underline	Underlines the text.
Border	Creates a frame around the text.
Opaque	Overlays any background information within the zone.

9. To move the zone in the desired direction, click the following buttons:
   - **Up**
   - **Left**
   - **Right**
   - **Down**
10. To increase or decrease zone height, click **Size +** and **Size–.**
11. To increase or decrease zone width, click **>Size<** and **<Size>.**

    The **Zone Coordinates** values display the left, right, top, and bottom coordinates in pixels of the zone.

    The zone length, number of rows, and height are displayed. This information is generated when the zone is set up, and can be changed.
12. To update the zone coordinates, click **Set.**

Testing and Saving a Zone

To test and save a zone, proceed as follows:

1. To use the test area to test the settings for the zone, enter a sample of the database information in the test area and click **Test.**

   The text appears in the Image Viewer in the current zone. You can verify that the proper font size, name, and weight are used as well as any additional attributes you assigned.
2. To save the settings for a zone, click **Save.**
3. When all zones are set up, to save all changes in the template, click **Apply.**
4. To display all zones in the current template, click **Show.**
5. To cancel the current changes, click **Undo.**

Defining Form OCR

The **Form OCR Definition** tab is also used to assign zones to a template. Rather than overlaying data from the database, the text is later extracted from the form and used to populate specified database fields.

The **Form OCR Definition** window displays the template on the right side of the window in the Image Viewer.

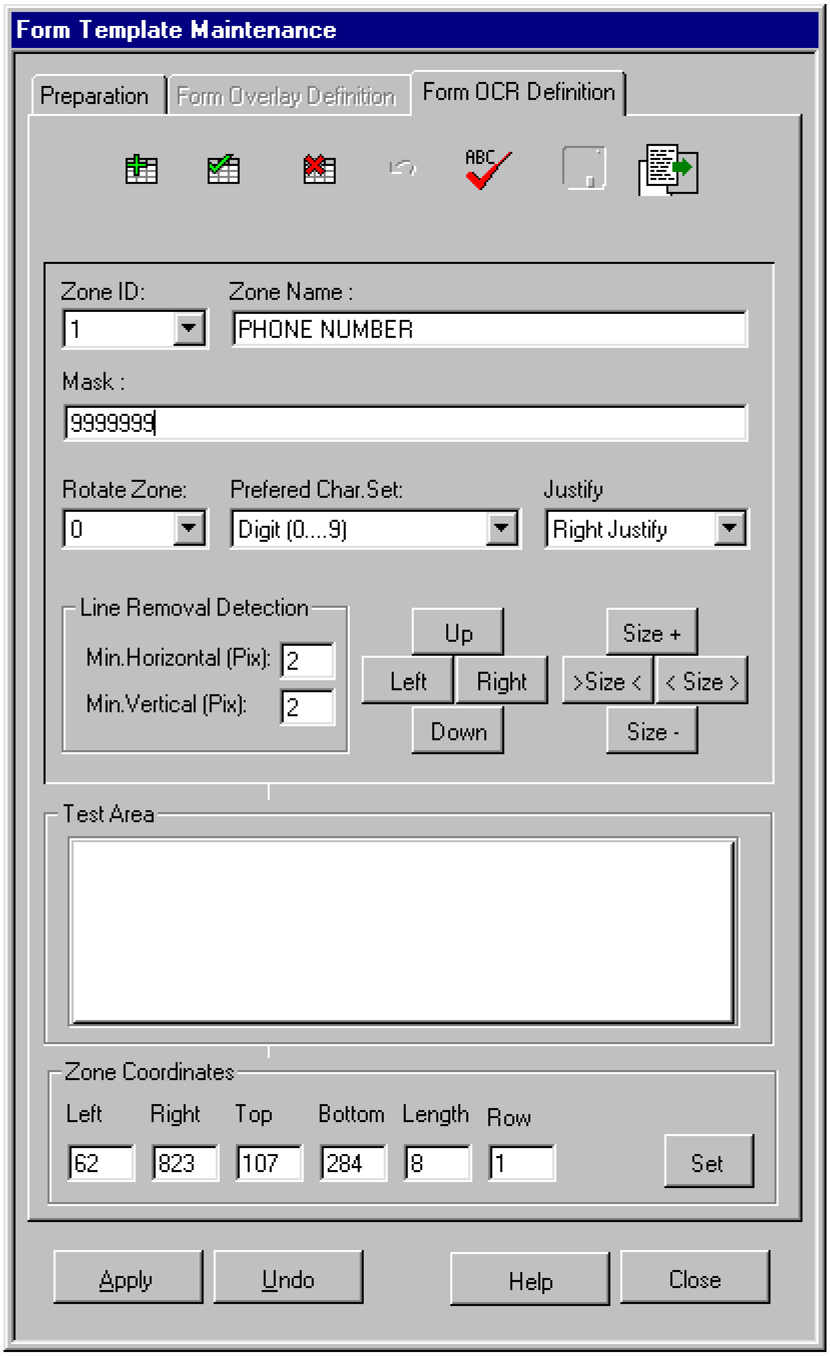


Figure 27: Form Template Maintenance window with Form OCR Definition

When creating a form template, it is necessary to create a signature zone. A **signature zone** is used in the Form OCR Server setup to identify the incoming form. This zone must be defined with the ID number *1* and the zone name *signature*. For more information on Form OCR Server, see the *Exigen Workflow Administrator's Guide, Part 2: Business Component Reference*, Chapter 5: Form OCR Server.

This section describes how to add a signature zone to a template using the following procedures:

- Defining a Signature Zone
- Modifying or Deleting a Signature Zone

Defining a Signature Zone

To define a signature zone, proceed as follows:

1. Click **New.**

   The cursor changes to the Zone tool.
2. Position the new cursor at the top left corner of the area you are defining as the zone.
3. Click and drag to the lower right corner of the area.

   A box appears while the cursor is dragged.
4. Once the zone is completely outlined, release the mouse button.

Note: As scaling is a complex process, it is recommended that the zone borders on the template be larger than the actual zone.

When creating zones for Form OCR Processing, it is important to allow for deskewing and differences in potential print sizes for the incoming forms. Consider these factors when creating each zone and allow space on all sides to ensure that the zone is captured properly each time.

The Zone ID is generated by the system when a new zone is added to the template.

Modifying or Deleting a Signature Zone

To modify or delete a signature zone, proceed as follows:

1. In the zone list, select a zone ID and click the appropriate button.
2. To name the zone, in the **Zone Name** field, enter a descriptive title.

   This name is used during OCR server setup to define the database fields that are populated by the extracted data.
3. In the **Mask** field, enter the mask for the anticipated value for the zone.

   It is recommended that a generic mask is used rather than specific characters for all zones except the signature zone. If the signature zone is a specific word, such as *INVOICE* for invoice forms, use the exact value to ensure a proper match.

   The following characters are used to create generic masks:

Generic mask characters	
Symbol	**Meaning**
X or x	Any character in the case entered.
!	Any character.
A or a	Alpha characters in the case entered.
A	Alpha characters, uppercase.
9	Digits 0 to 9.
N or n	Alphanumeric characters in the case entered.
N	Alphanumeric characters, uppercase.
[x]	Check box.
!!!! !!!	Bar code.

The **Justify** list box is used to specify the placement of a zone around selected text. The **Justify** list box setting must be specified before the zone is drawn.

4. To specify the placement of a zone around selected text, in the **Justify** list box, select one of the following options:

Justify list box options	
Option	**Description**
None	Zone remains at its original position.
Left Justify	Zone is positioned so that the selected text is justified left.
Right Justify	Zone is positioned so that the selected text is justified right.
By Example	Zone is resized to match the selected text exactly.

5. To move the current zone, click the following buttons:
   - **Up**
   - **Left**
   - **Right**
   - **Down**
6. To increase or decrease zone height, click **Size +** and **Size –.**
7. To increase or decrease zone width, click **>Size<** and **<Size>.**
8. To check whether the line removal settings are correct, click **Test.**

   The zone text appears in the **Test** window with the lines removed according to the settings.

   The **Zone Coordinates** values display the left, right, top, and bottom coordinates in pixels of the zone. The zone length, number of rows, and height are also displayed. This information is generated when the zone is set up and can be changed.

Note: **Test** is disabled if Image Enhancement Engine is not installed.

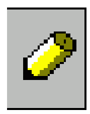
9. To save the zone coordinates, click **Set.**
10. To remove scanning defects from the zone area, in the **Line Removal Detection** section, enter appropriate values as described in the following table:

Line Removal Detection section

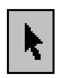
Name	Description
Min. Horizontal (Pix)	Minimum size, in pixels, of horizontal lines to be deleted. This value must be large enough to ensure that horizontal lines such as the horizontal portions of the letter *T* are not removed.
Min. Vertical (Pix)	Minimum size, in pixels, of vertical lines to be deleted. This value must be large enough to ensure that vertical lines such as the vertical portions of the letter *H* are not removed.

The cleaning is applied just before Forms OCR Processing to achieve an accurate result. Changes are not saved in the document.

11. If the selected mask is a check box, enter values as follows:
    - In the **Min. Horizontal (Pix)** and **Min. Vertical (Pix)** fields, enter **30.**
    - Use the Erase edit tool to clear the area defined as the zone. Ensure the area defined as the zone is blank.
12. To apply permanent horizontal and vertical line removal within each zone created, use the **Highlight edit tool** to highlight the line to be removed.



13. Click **Modify edit tool** and double-click the highlighted area.



The **Object Settings** window appears.

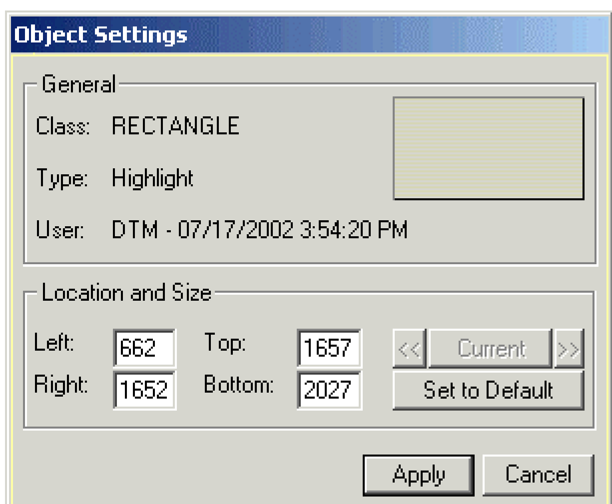


Figure 28: Object Settings window

The **Location and Size** section displays the coordinates for the line.

14. To obtain the value for the **Horiz. Line Removal** setting, subtract the value in the **Right** field from the value in the **Left** field.

15. To obtain the value for the **Vert. Line Removal** setting, subtract the value in the **Bottom** field from the value in the **Top** field.
16. To perform line removal for the zone, enter these values in the appropriate fields.
17. To save settings for a zone, click **Save.**
18. When all zones are set up, to save all the changes made in the template, click **Apply.**
19. To display all zones existing in the current template, click **Show.**
20. To cancel the current changes, click **Undo.**

Assigning a Document Template to a Project

Document templates are draft documents created in an external application such as Word or Excel. Document templates are applied when a user processes a task using an external application.

Note: This feature is not available in standard Exigen Workflow client/server and Web applications. It is supported by programmable extensions only, and is available via application programming interfaces (APIs). For information on how to acquire this feature, contact Exigen Support Services.

For more information on setting up document templates for tasks, see the *Exigen Workflow Administrator's Guide, Part 1: Design and Configuration,* Chapter 4: Setting Up Exigen Workflow, Setting Up Document Templates for Tasks.

Template Management Utility is used to assign document templates to a project.

To assign a document template to a project, proceed as follows:

1. Ensure that the document template is saved on the computer where Exigen Workflow is installed.
2. Open Template Management Utility as described in Opening Template Management Utility.

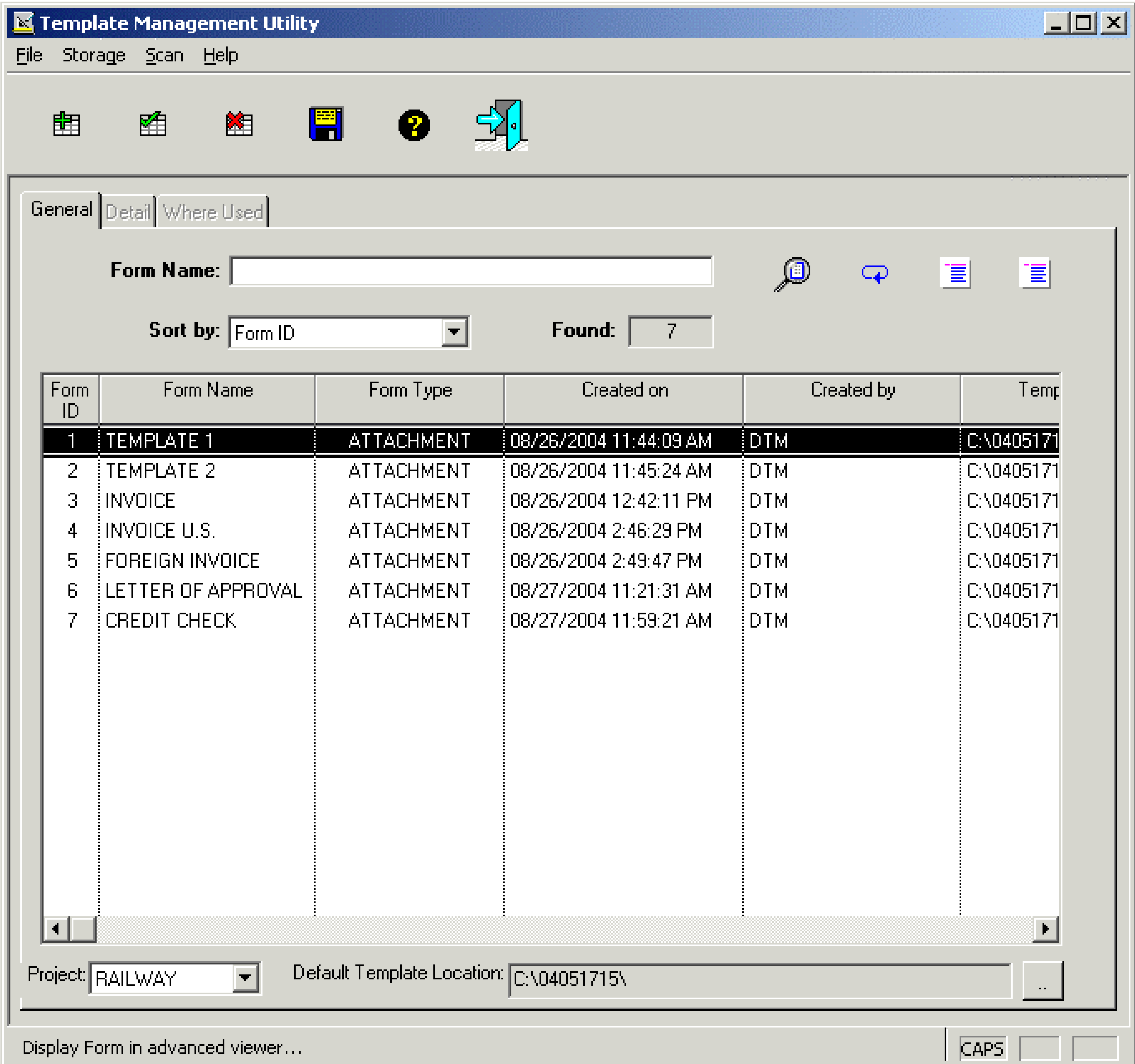
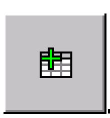


Figure 29: Opening Template Management Utility

3. In the **Project** list box, select the project.
4. Click **New** .

   The **Form Template Maintenance** window appears with most controls disabled. This window is used to assign document templates to projects. This window appears only when a project is selected in the **Template Management Utility** window. If a project is selected, the **Form Overlay Definition** and **Form OCR Definition** tabs are disabled.

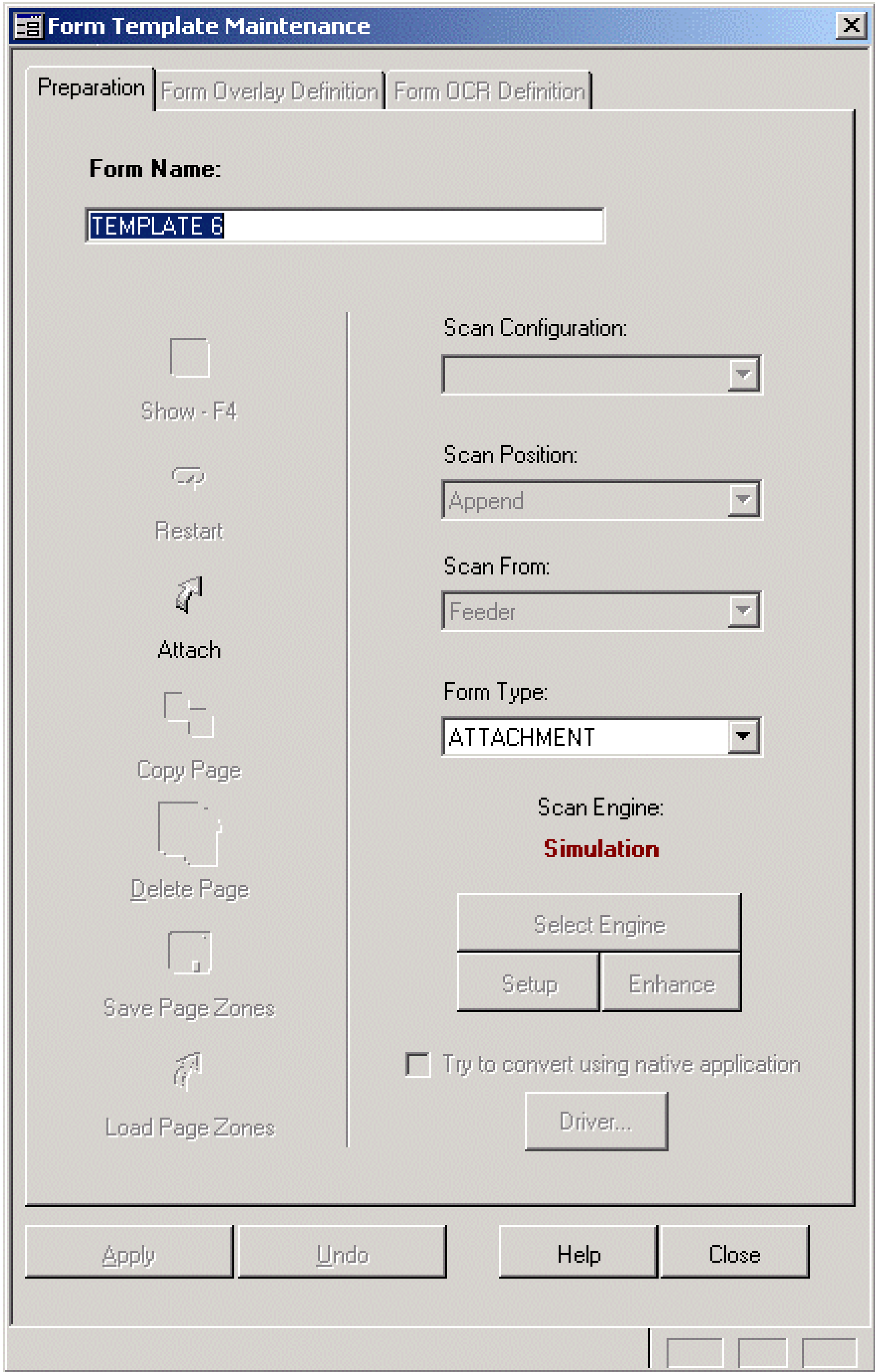


Figure 30: Assigning a document template to a project

5. In the **Form Name** box, enter a name for the template, for example, *INVOICE.*
6. To select the document template, click **Attach.**
   The **Select Template** window appears.
7. In the **Files of Type** box, select the task, for example, *Pre_Inv (*.doc).*
   A task can be selected only if tasks are defined for the project.

8. Select the template file.
9. Click **Open.**
10. To view the template, click **Show.**
11. To copy the template to the default template location, click **Apply.**

    If a file with the same name exists in the default template directory, an error message appears.

    If file with the same name does not exist in the default template directory, a confirmation window appears.
12. To save the template, click **Yes.**
13. To close the **Form Template Maintenance** window, click **Close.**

The **Template Management Utility** window appears with the new document template in the list.

Template Management Utility Menus and Buttons

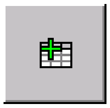
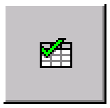
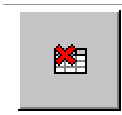
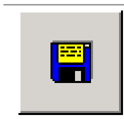
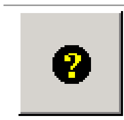
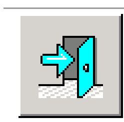
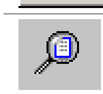
This section describes Template Management Utility menus and buttons.

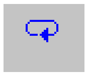
The following topics are described in this section:

- Form Manager Window
- Form Template Maintenance Window

Form Manager Window

The following table describes the **Form Manager** window button and menu functions:

Form Manager window buttons and menu functions			
Button	**Menu command**	**Shortcut key**	**Description**
	**File >** **New**		**New Form** Opens the **Form Template Maintenance** window to create a new form template.
	**File >** **Modify**		**Modify Form** Opens the **Form Template Maintenance** window to modify the selected form template.
	**File >** **Delete**		**Delete Form** Deletes the selected form template from the system.
	**File >** **Save Configuration**		**Save Configuration** Saves the configuration of the **Form Manager** window.
	File > **Delete All**		**Delete All Forms** Deletes all form templates listed from the system.
	Storage > Optimize Template Storage		**Optimize Template Storage** Compresses all template files to optimize the storage space.
	Storage > **Recover Template Storage**		**Recover Template Storage** Recovers any template files that cannot be opened due to invalid closing or shutdown procedures run the last time the template was accessed.
	Scan > Select Scan Engine		**Select Scan Engine** Opens a dialog box to select the scanning device to be used.
	**Help > Context Help**	**F1**	**Help** Opens the help section.
	Help > Help Topics	**CTRL+F1**	**Help Topics** Displays a list of available help topics.
	Help > About Exigen Workflow		**About Exigen Workflow** Displays copyright and release information regarding Exigen Workflow.
	**File >** **Exit**		**Exit** Closes the **Form Manager** window.
			**Find Specific Form** Queries the list for form names matching the search criteria entered in the field of the same name.

	**Refresh** Refreshes the form list.
	**Display Template** Displays the selected template in the Image Viewer on the right side of the window.

Form Template Maintenance Window

This section describes **Form Template Maintenance** window menus and buttons.

The following topics are described in this section:

- Preparation Tab
- Form Overlay Definition Tab
- Form OCR Definition Tab

Preparation Tab

The appearance of the **Preparation** tab differs depending on whether a project is selected in the **Template Management Utility** window:

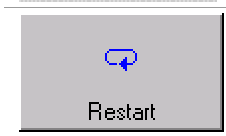
- If no project is selected, the **Preparation** tab displays the buttons required for creating form templates.
- If a project is selected, the **Preparation** tab displays the buttons required to assign document templates to projects.

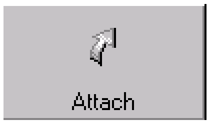
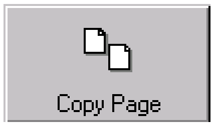
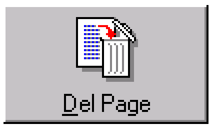
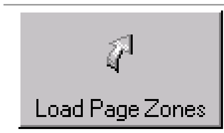
The following topics are described in this section:

- Preparation Tab for Form Templates
- Preparation Tab for Document Templates

Preparation Tab for Form Templates

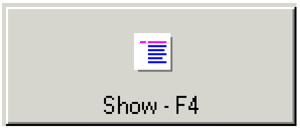
The following table describes the buttons in the **Form Template Maintenance** window **Preparation** tab when it is used to create form templates:

Form Template Maintenance window, Preparation tab buttons for form template creation	
Button	**Description**
	**Scan** Begins the scanning process. **F3** is the shortcut for this button.
	**Restart** Deletes any scanned or loaded image associated with the current form template, allowing another image to be inserted. This feature works with the add and modify template functions.

Form Template Maintenance window, Preparation tab buttons for form template creation	
Button	**Description**
	**Attach Image** Opens the **Image-Attach File** window to use existing DMS files to create templates.
	**Copy Page** Copies the page displayed either at the end or after the current page.
	**Delete Page** Deletes the page displayed.
	**Save Page Zones** Saves the zones assigned to a page in a file format.
	**Load Page Zones** Loads previously saved page zones onto new form templates.
	**Select Engine** Selects the engine to be used for scanning.
Setup	**Setup** Opens the **Setup** window to adjust the scanner settings.
Enhance	**Enhance** Opens the **Enhance** window to improve the image quality.
Apply	**Apply** Applies all changes made to the current form template.
Undo	**Undo** Reverses the last modification made.
	**Driver** Opens the **Driver Setup** window for selecting the needed driver.
Help	**Help** Opens help.
Close	**Close** Closes the **Form Template Maintenance** window without saving modifications in the current form template.

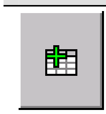
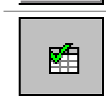
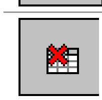
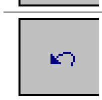
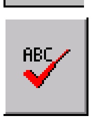
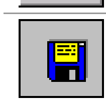
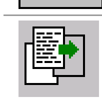
Preparation Tab for Document Templates

The following table describes the buttons in the **Form Template Maintenance** window **Preparation** tab when it is used to assign document templates to a project:

Form Template Maintenance window, Preparation tab buttons for document templates	
Button	**Description**
	**Show** Displays a document template. This button is enabled only if a document template is selected.
	**Attach** Selects a document template.
Apply	**Apply** Copies the document template to the default template location.
Help	**Help** Opens help.
Close	**Close** Closes the **Form Template Maintenance** window.

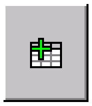
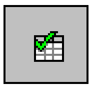
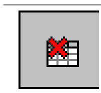
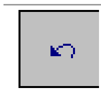
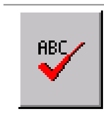
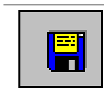
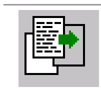
Form Overlay Definition Tab

The following table describes the **Form Template Maintenance** window **Form Overlay Definition** tab button and menu functions:

Form Overlay Definition tab buttons	
Button	**Description**
	**New** Changes the mouse into the zone tool to add a new zone to the template.
	**Modify** Modifies the selected zone.
	**Delete** Deletes the selected zone.
	**Undo** Undoes the last change to the selected zone.
	**Test** Checks the size, location and other attributes of the selected zone before saving it.
	**Save** Saves all attributes for the current zone.
	**Show All** Displays all zones for the current template in the Image Viewer.

Form OCR Definition Tab

The following table describes the **Form Template Maintenance** window **Form OCR Definition** tab button and menu functions:

Form OCR Definition tab buttons	
Button	**Description**
	**New** Changes the mouse into the Zone tool to add a new zone to the template.
	**Modify** Modifies the selected zone.
	**Delete** Deletes the selected zone.
	**Undo** Undoes the last change to the selected zone.
	**Test** Checks the size, location, and other attributes of the selected zone before saving it.
	**Save** Saves all attributes for the current zone.
	**Show All** Displays all zones for the current template in the Image Viewer.

Chapter 9: Transfer Utility

This section explains how to use Transfer Utility.

The following topics are described in this section:

- Overview
- Preparing to Transfer Documents
- Transferring Documents
- Transfer Utility Menus and Buttons

Overview

Transfer Utility is used to move image files from one physical location to another, for example, from a raid unit to a server. The process includes changing the database pointers for each document file moved.

Preparing to Transfer Documents

To prepare to transfer documents, perform the following steps:

1. Review the documents to be transferred.
   The documents must be displayed.
2. If you are planning to transfer data to optical storage, ensure that the optical configurations are specified.
   For more information on optical configurations, see the *Exigen Workflow Administrator's Guide, Part 1: Design and Configuration,* Chapter 4: Setting Up Exigen Workflow.

Transferring Documents

The following topics are included in this section:

- Initiating Document Transfer
- Using the Transfer Utility Window
- Identifying the Files to Be Transferred
- Running Transfer Server

Initiating Document Transfer

To begin transferring documents, perform the following steps:

1. In the **Exigen Workflow Explorer** window, select the **Utilities** folder, and double-click **Transfer Utility.**

   The **Workflow Transfer Utility** window appears.

2. In the **Workflow Transfer Utility** window, select the project and workflow.

   The **Transfer** window appears. For more information on transfers, see Using the Transfer Utility Window.

3. Identify the documents to be transferred.

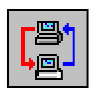
   This can be done using the Control file or by entering a direct database query, as described in Identifying the Files to Be Transferred.

4. Select the **Select Data from** and **Transfer Data to** types.
5. To start the transfer process, click **Transfer.**

Using the Transfer Utility Window

To use the **Transfer Utility** window, perform the following steps:

1. To open Transfer Utility, in the **Exigen Workflow Explorer** window, select the **Utilities** folder and double-click **Transfer Utility.**



   The **Workflow Transfer Utility** window appears.

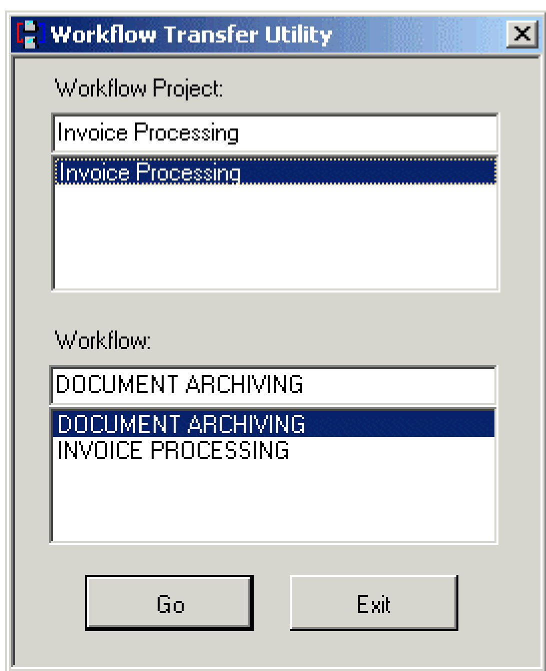


Figure 31: Exigen Workflow Transfer Utility window

2. In the **Workflow Project** field, select the project to transfer.

3. In the **Workflow** field, select the workflow to transfer.
4. Click **Go.**

The main **Transfer Utility** window appears.

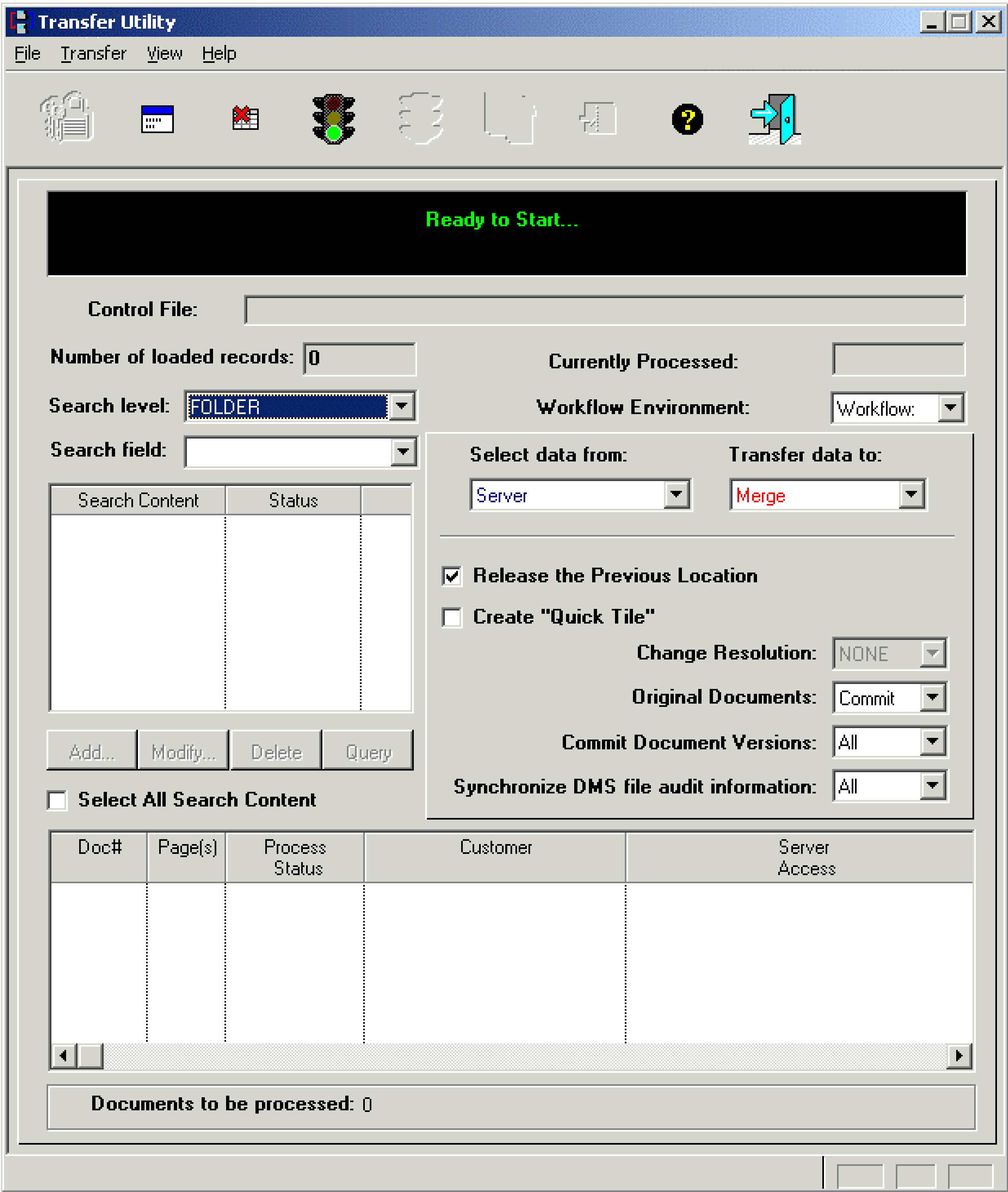


Figure 32: Transfer Utility window

For information on menus and buttons in the **Transfer Utility** window, see Transfer Utility Menus and Buttons.

The **Transfer Utility** window contains the following fields and tables:

Transfer Utility window	
Field	**Description**
Status and processing field	Transfer Utility status and processing messages.
Control File	Path to the text file containing a field value for each document record.
Number of Loaded Records	Number of records that are selected for transfer.
Currently Processed	Number of records processed by the transfer.
Search Level	List box that displays the tables used for the search criteria. Searches can be performed in either the **Folder** or **Document** table.
Search Field	List box that displays all fields existing in the table, which is selected in the **Search Level**. The table and the field must be selected.
Exigen Workflow Environment	Exigen Workflow environment. The following options are available: • **Archive** for transferring documents that are already committed • **Workflow** for selecting documents in the active workflow
Select Data from	Storage medium of the documents to be transferred. The following options are available: • Optical • Server • Magnetic • Any Devices If a specific device is selected, only those documents residing on the device and meeting the search criteria are transferred.
Transfer Data to	Target storage medium. The following options are available: • **Optical:** Enables the **Setup** button and is used to perform Optical Volume Maintenance. For more information on how to configure optical volumes, see the *Exigen Workflow Administrator's Guide*, *Part 1: Design and Configuration,* Chapter 4: Setting Up Exigen Workflow. • **Magnetic:** Enables the **Select Target Directory** dialog box and is used to map the target location. • **Merge:** Combines all segments into a DMS file if you commit documents to **Optical** with the **Partial** option and have a DMS file presented in chunks with the extension DMS, 001, 002. • **Trash** prompts if you want to save the documents to a specific directory. **NO** deletes the documents. **YES** opens the **Select Trash Directory** dialog box. The path to the trash directory must be selected, and **OK** must be clicked.
Release Previous Location	Instructs the system to move the files from the source medium to the target. If it is cleared, the files are copied.
Create "Quick Tile"	Creates thumbnail views of the documents. If thumbnail views do not exist, the option must be selected.
Change	Changes resolution of the image files during the transfer process. The following options are

Transfer Utility window	
Field	**Description**
Resolution	available: • 100 • 150 • 200 DPI • None **None** is selected to retain the current DPI setting. Decreasing the resolution also decreases the image file size, and you cannot increase it later. The image quality is decreased permanently.

5. Select the settings and click **Start Transfer.**

Identifying the Files to Be Transferred

You can identify the documents for performing a transfer in the following ways:

- Using the Control File
- Performing a Direct Query

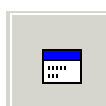
Using the Control File

The **control file** is a flat file that contains a field value for each document record. This field value must correspond with the Search Level and Search Field selections.

For example, if one of the folder fields in your project is Tax ID, or A_TAX_ID, and you want to transfer accounts with a specific tax ID, you can generate a flat file named `taxid.txt` that contains all tax IDs and can be used as a control file.

To use the control file, perform the following steps:

1. To register the control file, click **Load Control File.**



2. To locate the path to the `taxid.txt` file, browse the directories.

   The `taxid.txt` file contains account numbers that are part of the folder table.

3. In the **Search level** field, select **Folder.**
4. In the **Search field,** select **A_TAX_ID.**

   Once the text file and search criteria are selected, the values listed in the control file are displayed in the table located in the middle-left of the window. Each record found is listed.

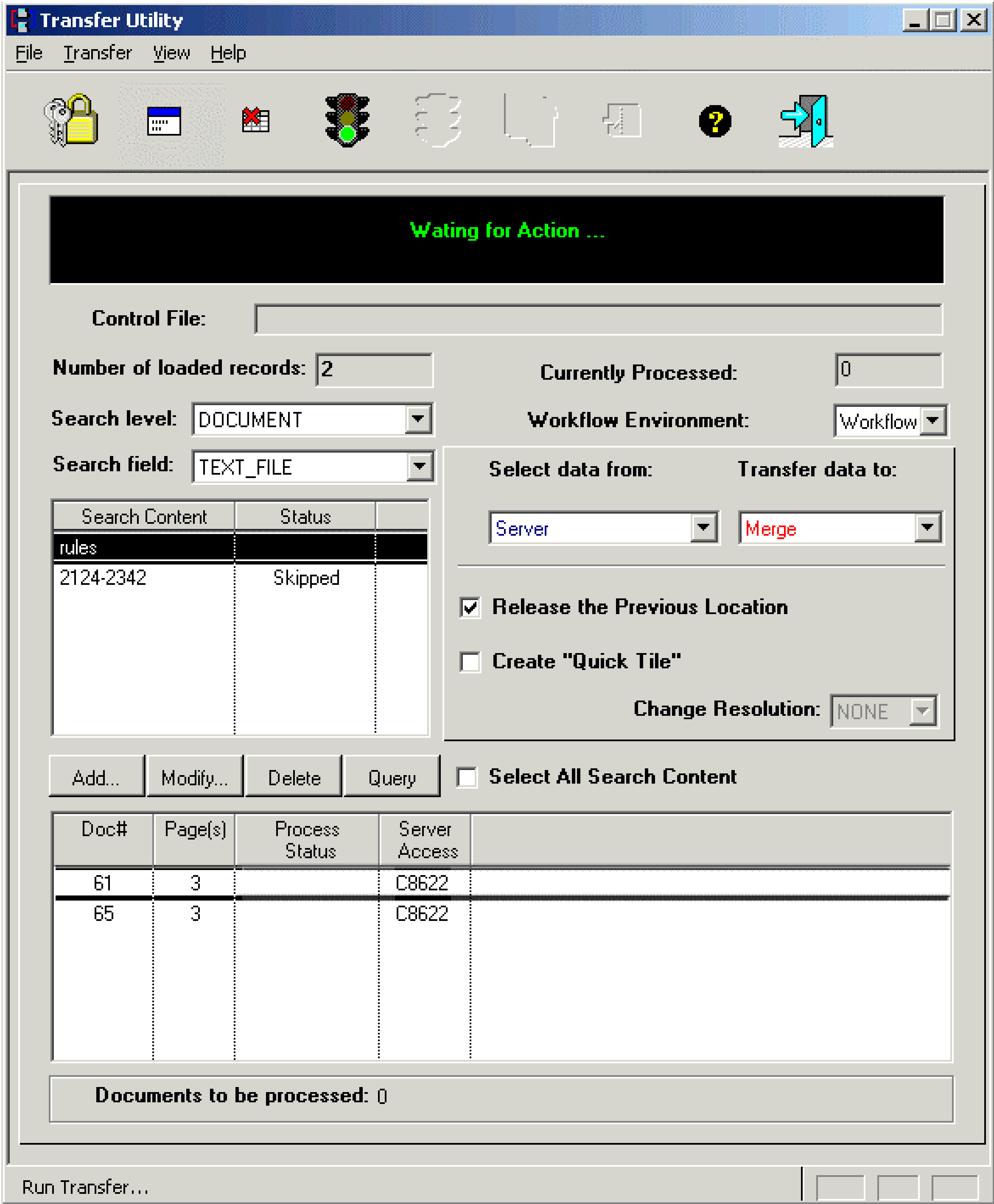


Figure 33: Transfer Utility window with control file

Performing a Direct Query

If you do not want to use a control file, you can perform a direct query on the database. To perform a direct query on the database, perform the following steps:

1. Select the level and field to query.

2. Click **Query.**

   The **Add/Modify Search Content** window appears.

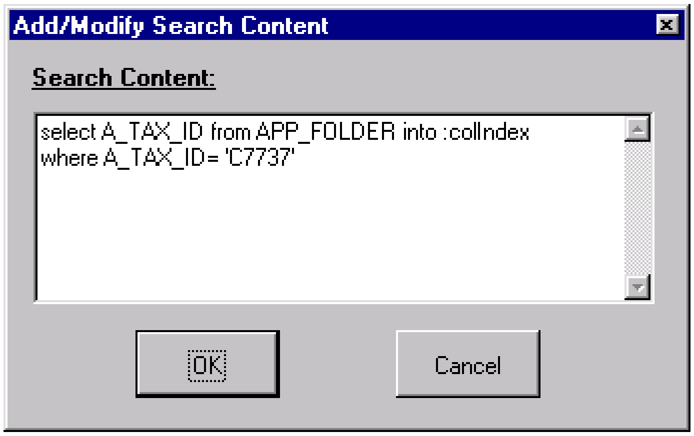


Figure 34: Add/Modify Search Content

3. To define the search criteria, make appropriate entries in the **Search Content** field.

   For the preceding example, if the folder table also contained a Tax ID, or A_TAX_ID, with a valid value, the following search string is used for folders:

   WHERE A_TAX_ID = 'C7737'.

4. To execute the query, click **OK.**

   The records located are displayed in the **Search Content** table in the middle-left of the window.

5. To alter the records, click one of the following options:
   - **Add**
   - **Modify**
   - **Delete**
6. If **Add** or **Modify** is selected, enter a new value or change the existing value, and click **OK.**
7. To delete a record, select the record and click **Delete.**
8. To highlight all records in the list, select the **Select All Search Content** check box.

   The table at the bottom displays the documents found for the records listed. These documents are transferred when you click **Start Transfer** as described in Running Transfer Server.

9. Select individual records using standard Windows selection options.

Running Transfer Server

After you select the records to be transferred, and locate and configure the source and target medium locations, you can begin the transfer process. To run Transfer Server, perform the following steps:

1. Click **Start Transfer.**

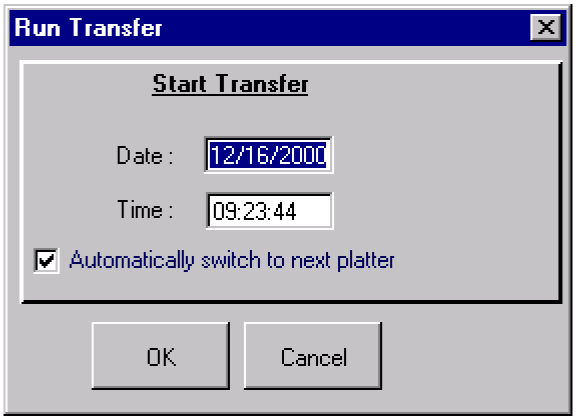


Figure 35: Run Transfer window

2. To stop the transfer of documents at any time during the process, click **Stop Process.**
3. If you transfer in error, to return the transferred files to the source, click **Undo**.
   When the transfer is completed, a message appears.

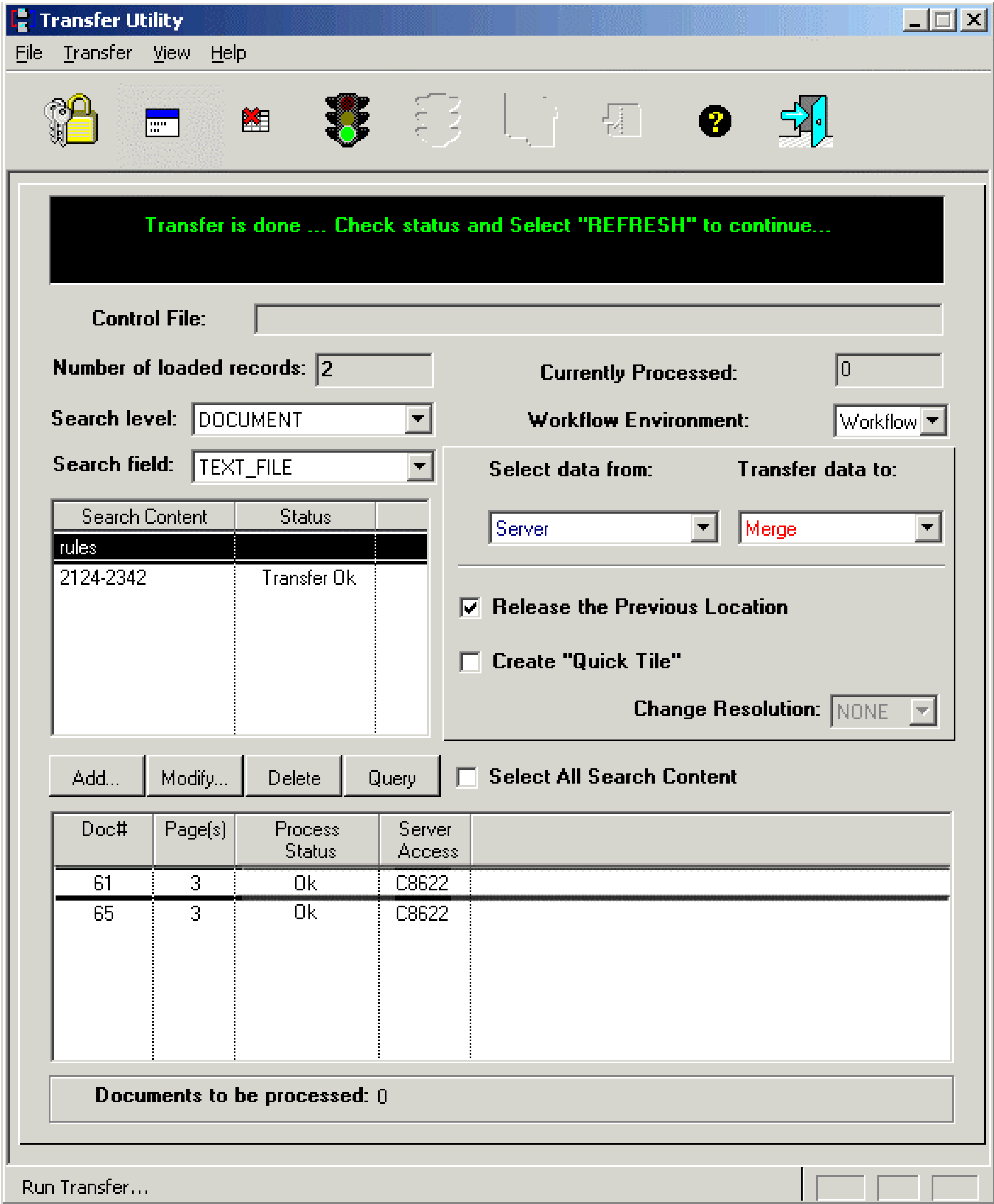
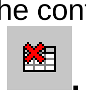


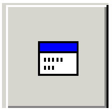
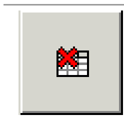
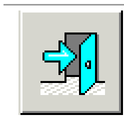
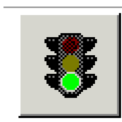
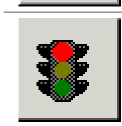
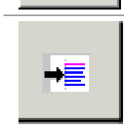
Figure 36: Transfer completed

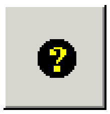
4. To change the control file or perform another database query for additional documents, click **Delete the content** .
5. To confirm the choice, click **Yes.**
   Clicking **Delete the content** releases the selected control file and resets all query information.

6. Modify the query criteria as described in Performing a Direct Query.

Transfer Utility Menus and Buttons

The following table describes the **Transfer Utility** window buttons and menu functions:

Transfer Utility window buttons and menu functions			
Button	**Menu command**	**Shortcut key**	**Description**
			**Load Control File** Loads the control file.
	File > Refresh Document List	**F5**	**Refresh Document List** Refreshes the document list.
	File > Check Folder	**CTRL+C**	**Check Folder** Checks search result documents to determine whether the selected folder exists. The command is enabled only if a search is conducted by FLD_RSN field in the DOCUMENT table.
	File > Save Control File	**CTRL+F**	**Save Control File** Saves the control file.
			Control List Opens the **File** dialog box to select the control list file to be used for the transfer.
	**File > Delete Search Content**	**CTRL+DEL**	**Delete Search Content** Clears the **Search Content** window and all related queries. Deletes the values in the **Search Content** column.
	**File > Exit**	**F12**	**Exit** Closes the main **Transfer Utility** window.
	**Transfer > Setup…**		**Setup…** Opens the **Optical Disk Volumes Maintenance** window, which is used to configure the optical drives for storage.
	**Transfer > Start Transfer**	**CTRL+T**	**Start Transfer** Starts document transfer.
	**Transfer > Stop Transfer**	**CTRL+S**	**Stop Transfer** Stops document transfer.
			**Undo Transfer** Returns selected transferred documents to the original storage medium.
	**View > Display Image**	**CTRL+L**	**Display** Displays the selected document in the Image Viewer.

Transfer Utility window buttons and menu functions			
Button	**Menu command**	**Shortcut key**	**Description**
	View > Show Original	**CTRL+O**	**Show Original** Displays the original version of the selected document.
	View > Show Versions	**CTRL+V**	**Show Versions** Displays a list of all versions of the selected document. The current version is displayed at the bottom of the list.
	**Help > Context Help**	**F1**	**Context Help** Opens the help section.
	Help > Help Topics	**CTRL+F1**	**Help Topics** Displays a list of available help topics.
	Help > **About Exigen Workflow**		**About Exigen Workflow** Displays copyright and release information regarding Exigen Workflow.

Chapter 10: E-Capture Definition Utility

This section describes how to use E-Capture Definition Utility. The following topics are described in this section:

Overview

The definition utility module of Exigen E-Capture prepares form templates for recognition and data extraction.

Tasks performed using E-Capture Definition Utility include the following:

- registering individual form templates and assigning necessary attributes
- mapping form templates, which includes selecting areas on a template of the electronic document that contain the information you want to recognize and extract
- testing form maps for accuracy
- specifying if and how E-Capture Server processes and verifies extracted information

Getting Started

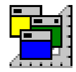
Before using E-Capture Definition Utility, you must set up the E-Capture environment using Exigen E-Capture Administrator. These procedures are described in the *Exigen Workflow Administrator's Guide, Part 1: Design and Configuration*.

E-Capture Definition Utility requires Adobe Acrobat Reader for displaying PDF files.

The following topics are described in this section:

Starting E-Capture Definition Utility

To start E-Capture Definition Utility, perform the following steps:

1. In the **Exigen Workflow Explorer** window, select **Administration Tools > Utilities.**
2. Double-click the **E-Capture Definition Utility** icon .
   The **E-Capture Definition Utility** window appears.

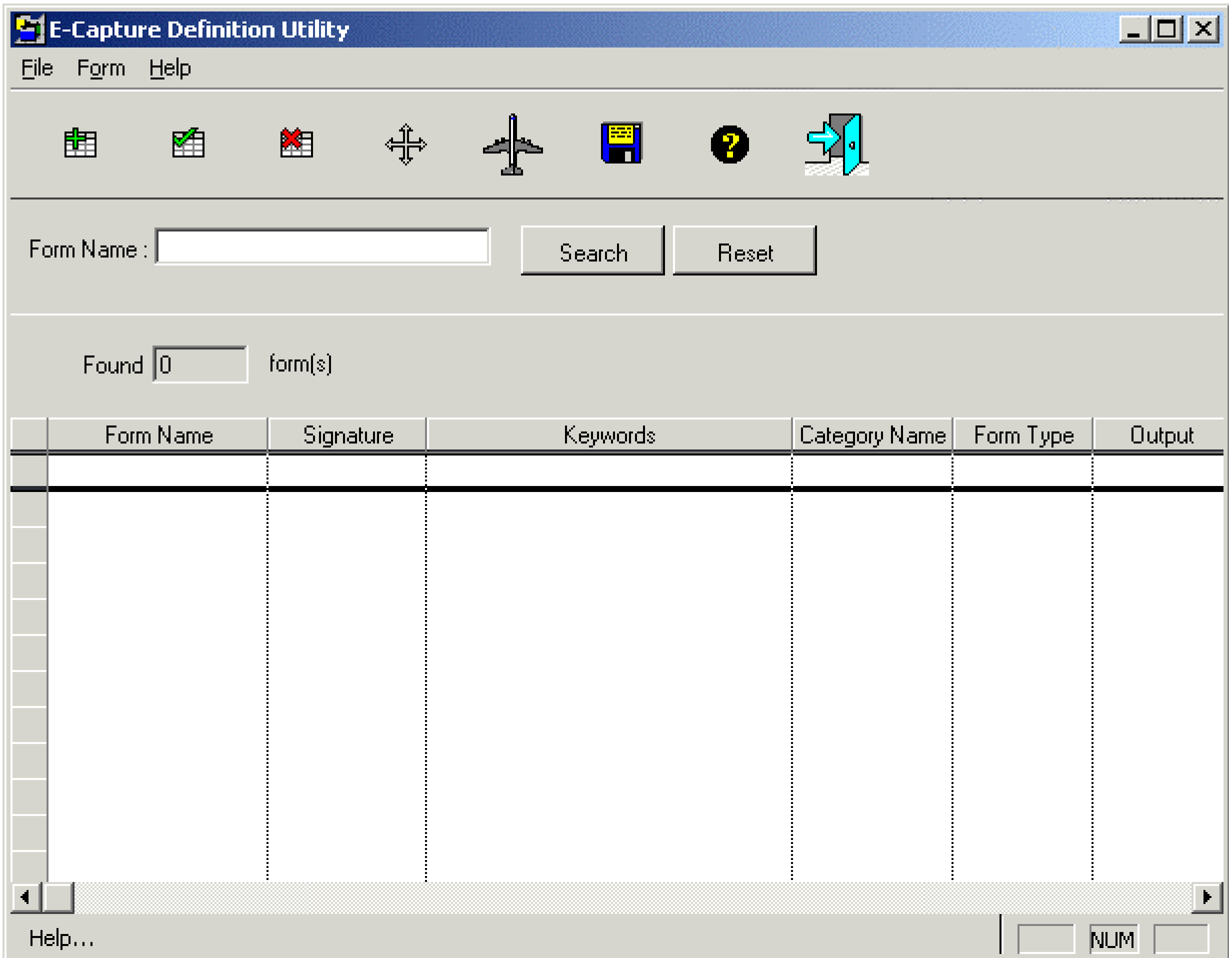


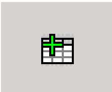
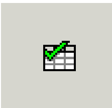
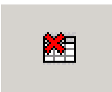
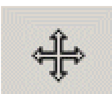
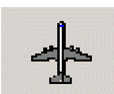
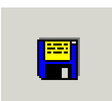
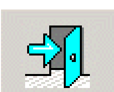
Figure 37: E-Capture Definition Utility window

The records in the **E-Capture Definition Utility** window display the names of registered forms and a number of other attributes. These attributes are described in the following table:

E-Capture Definition Utility window attributes	
Attribute	**Description**
Form Name	Form template name. The name must be descriptive so that the form is easy to recognize. Form names must be unique.
Signature	Unique code that distinguishes a form, usually located in its bottom or upper corner. The signature must only be on the first page of a form, and often includes the form number and edition date. However, not all forms have a signature, and some multipage forms have a signature on each page. The signature can be used as the form name if only one type of software was used to produce the form.
Keywords	List of words used to identify the first page of a form. At least one keyword selection is mandatory. Keywords are useful because sometimes the signature does not provide the specificity required to differentiate between forms, such as multipage forms that have signatures on each page, and forms that refer to a signature in the actual form content. Only keywords from the first page of the template form are selected.
Category Name	Category associated with the form. Categories are set up using E-Capture Administrator.
Form Type	Form type associated with the form. Form types are set up using E-Capture Administrator.
Output	Output group associated with the form. Output groups are set up using E-Capture Administrator.
Company Name	Company to which the form is assigned. Companies are set up using E-Capture Administrator.
Vendor Name	Software used to create the form. If you handle one form that is produced using different software types, each version of the form must be mapped. Vendors are set up using E-Capture Administrator.
First Page	If other forms are not in the file that contains the template, the number **1** appears by default. Otherwise, the number of the first page of the template form is selected within the file.
Last Page	If other forms are not in the file that contains the template, the total number of pages in the template appears. Otherwise, the number of the last page of the template form within the file is selected.
File Name	Full file path of the source template file.
Description	Additional optional comments that help administer and maintain a form template.
St. Top	Numerical value of the top coordinate of the horizontal strip that contains the form's signature. If the form does not have a signature, this number represents the top coordinate of a strip containing keywords. In this case, all keywords must be located within the strip specified here. The strip feature is useful in preventing recognition errors caused by signatures contained within the content of other forms.
St. Bottom	Numerical value of the bottom coordinate of the horizontal strip that contains the form's signature. If the form does not have a signature, this number represents the bottom coordinate of a strip containing all keywords.
Orientation	Orientation of the form template: *Landscape* or *Portrait*.
Multipage Ind	Multipage indicator. This is described in Multipage Indicator.

E-Capture Definition Utility Tools

The following table describes the buttons and menu commands in the **E-Capture Definition Utility** window:

E-Capture Definition Utility window buttons and menu functions			
Button	**Menu command**	**Shortcut key**	**Description**
	**File > New**	**F2**	Adds a form.
	**File > Open**	**F3**	Opens an existing form for modification.
	**File > Delete**	**F5**	Deletes a form.
	**Form > Detail**	**F6**	Maps a form.
	**Form > Test**	**F7**	Tests a form.
	**File > Save Configuration**		Saves the size and position of the current window for the next time when the window is opened.
	**Help > Index**	**F1**	Opens help.
	**File > Exit**	**F12**	Closes the application.
	File > Save As	**F4**	Renames an existing form.

Searching Registered Forms

A search for registered forms by full name or partial name can be performed using the **E-Capture Definition Utility** window.

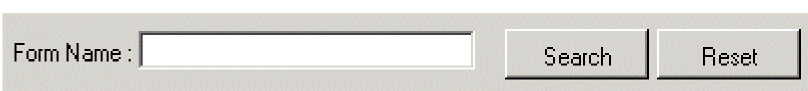


Figure 38: Searching for a form

The following topics are described in this section:

- Searching by Exact Name
- Searching by Partial Name

Searching by Exact Name

To search the list of registered forms by exact name, perform the following steps:

1. In the **Form Name** field, enter the exact name.
2. Click **Search.**
   If the form is found, its record appears in the table. If no match is found, the table does not show any records.
3. To clear the search and return to the complete list of form records, click **Reset.**

Searching by Partial Name

To search the table of registered forms by partial name, perform the following steps:

1. In the **Form Name** field, enter the partial name, replacing the unknown portion with the % symbol
2. Click **Search.**
   Records of forms containing the character string you entered are displayed. If no matches are found, the table does not show any records.
3. To clear the search and return to the complete list of form records, click **Reset.**

Registering a Form

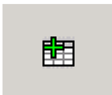
The following topics are described in this section:

- Opening the Add Form Window
- Viewing the Form Text and Template Source File
- Assigning Attributes

Opening the Add Form Window

To open the **Add Form** window to register a form, perform the following steps:

1. In the **E-Capture Definition Utility** window, click **Add.**



   The **Add Form** window appears.

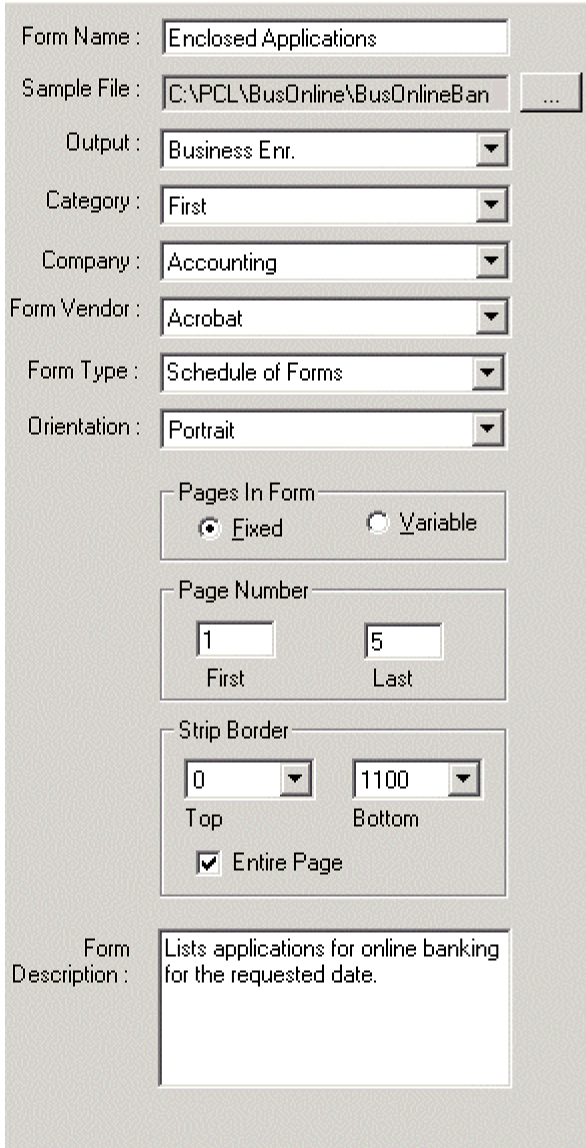


Figure 39: Add Form window

2. To define form attributes, enter values in the following tabs:
   - **General**
   - **Signature**
   - **Tables**

Viewing the Form Text and Template Source File

E-Capture's built-in text recognition capability reads the text of the following file types:

- PDF
- PCL

The text of the source template file appears in the **Document Text** field.

The panel at the bottom of the **Add Form** window contains tools for navigating through both the document text and original template source file.

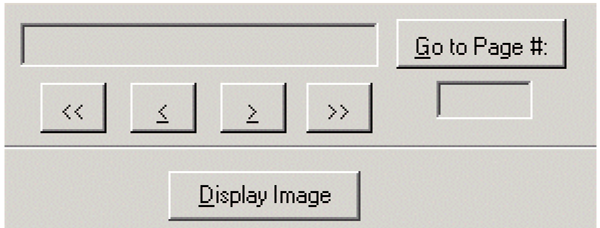


Figure 40: Viewing document text and source template file

Viewing the Form Text

To view the form text, use either of the following methods:

- In the **Go To Page** field, enter the number of the page and click **Go To Page.**
- To view the pages of the form, use the scroll bars and standard arrow buttons.

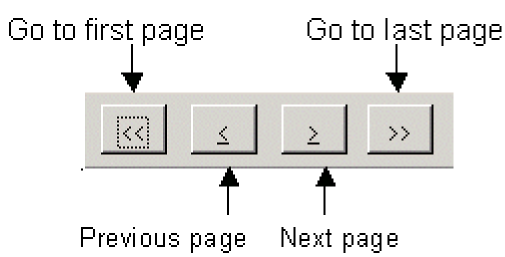


Figure 41: Labeled buttons of navigation panel

Viewing the Source File

To view the original form template's source file, click **Display Image.**

If the form template is a PDF file, the Adobe Acrobat Reader is launched. Otherwise, the Exigen Workflow Image Viewer is launched to display an image of a PCL file.

Assigning Attributes

The following topics are described in this section:

- Assigning Form Attributes in the General Tab
- Selecting Keywords and a Signature
- Selecting Keywords
- Modifying and Deleting Keywords
- Multipage Indicator
- Selecting a Signature

- Verifying Coordinates of the Selected Text
- Modifying and Deleting a Signature
- Rules for Selecting a Signature

Assigning Form Attributes in the General Tab

The **General** tab is used to perform the following actions:

- specify general form attributes
- define a strip border
- view the form text and source template file

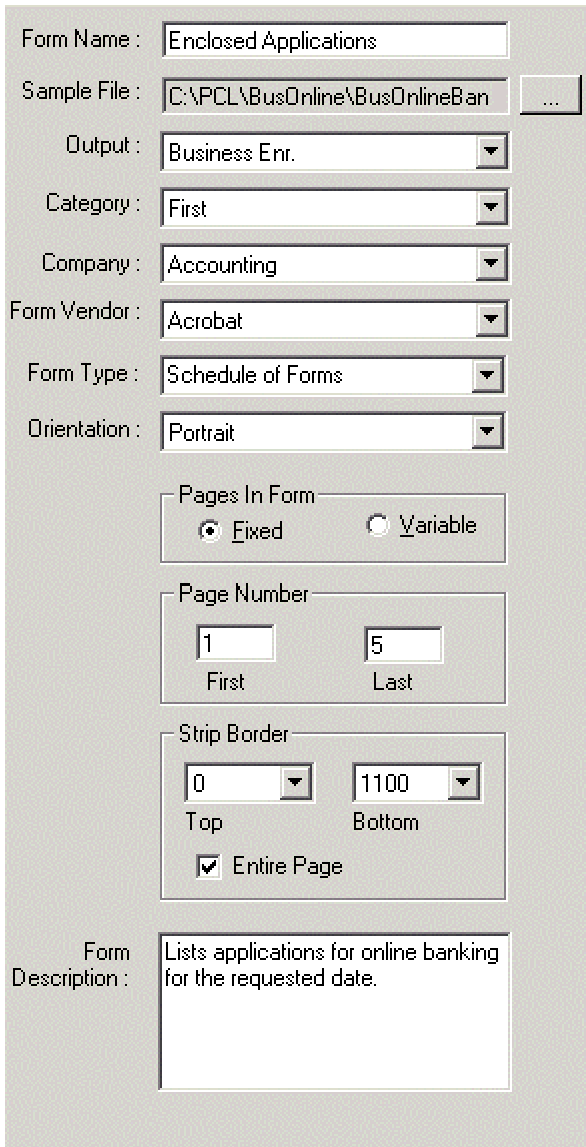
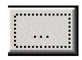


Figure 42: General tab

The procedures that can be performed using the **General** tab are described in this section.

To assign form attributes in the **General** tab, perform the following steps:

1. In the **Form Name** field, enter a unique name for the form.
2. To browse for a template file, click the browse button next to the **Sample File** field.



The **Open File** window appears.

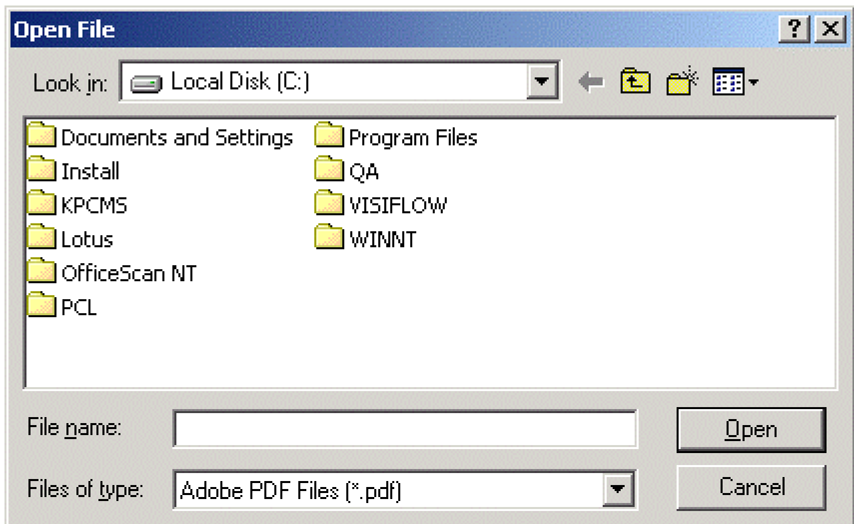


Figure 43: Selecting template file

3. To select the file type, in the **Open File** window, select a value in the **Files of type** list box
   You can only open files with the following extensions.
   - `.pcl`
   - `.pdf`
4. Select the source template file and click **Open.**
   The file name appears in the **Sample File** field.
5. In the **Output** list box, select the output group to which to assign the form.
6. In the **Category** list box, select the category to which to assign the form.
7. In the **Company** list box, select the company to which to assign the form.
8. In the **Form Vendor** list box, select the software vendor of the form.
9. In the **Form Type** list box, select the form type.
10. In the **Orientation** list box, select **Portrait** or **Landscape.**
11. In the **Pages in Form** panel, if you know the exact number of pages in the form, select the **Fixed** radio button. If you do not know the exact number of pages in the form, select **Variable.**
12. In the **Page Number** panel, enter the number of the first and last pages shown on the form template.

Note: You cannot modify the **Page Number** panel later.

13. To scan the full form page for keywords and a signature using E-Capture Server, in the **Strip Border** panel, leave **Entire Page** selected. To select a strip border, clear the **Entire Page** check box.

    The box is selected by default.

    In the **St. Top** and **St. Bottom** fields of the **Strip Border** panel, use the signature tab to determine these coordinates, and enter the number of the top and bottom coordinates of the strip that contains the signature or keywords of the form.

Selecting Keywords and a Signature

To select a signature and keywords for the form template, in the **Signature** tab of the **Add Form** window, enter values in the fields.

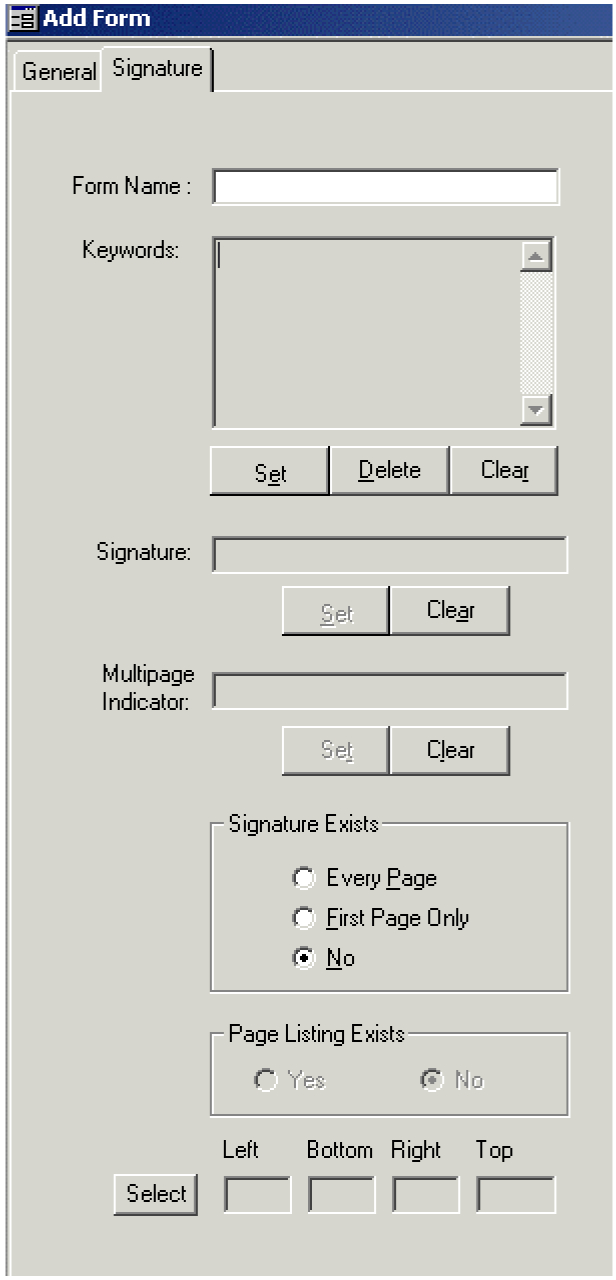


Figure 44: Signature tab

The **Form Name** field displays the name you entered in the **General** tab. The text of the named form appears to the right in the **Document Text** area.

Selecting Keywords

Keywords are used to recognize the first page of a form. You can select any number of keywords or keyword phrases. Review the following list of rules for selecting keywords.

- You must select at least one keyword. If the signature is sufficient to identify the form, use it as a keyword and select **No** in the **Signature Exists** panel.

- Keyword phrases must not contain commas.
- You cannot select part of a word as a keyword.
- Select all keywords from the first page of the form only.
- A keyword phrase can contain any number of words, but no commas.
- Each word inside a keyword phrase is used as a separate keyword. Word order and selection order are not relevant.
- If the form does not have a signature, ensure that all keywords are located within the coordinates of the strip border you defined on the **General** tab.
- The set of keywords and signature for each registered form of a given vendor must ensure correct recognition of the form. This means that the set of keywords and signature for any registered form must not be identical to or a subset of another set of keywords and signature for a form belonging to the same vendor.

To select a keyword or keyword phrase, perform the following steps:

1. In the **Document Text** area, highlight the keyword.

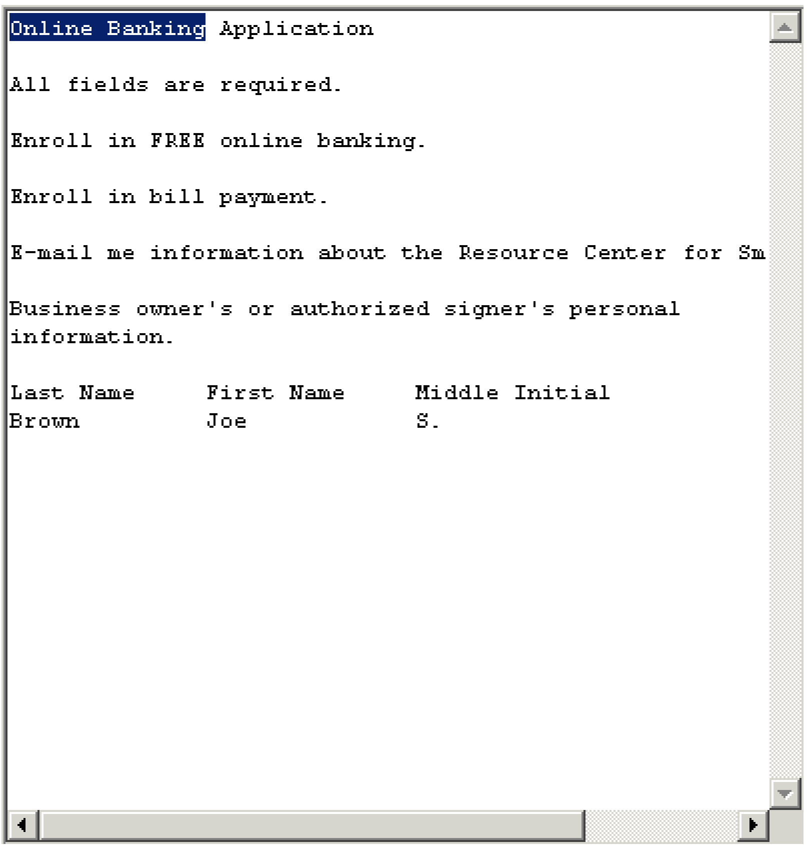


Figure 45: Selecting keywords

2. To save your selection, in the **Keywords** panel, click **Set.**
   The captured keyword or keyword phrase appears in the box.

Figure 46: Using Keyword panel to apply keyword selection

Modifying and Deleting Keywords

To prevent spelling errors, text cannot be typed into the **Keywords** box. Instead, you must delete and reselect the keyword or keyword phrase.

To delete your selections, perform the following steps:

1. In the **Document Text** area, highlight the keyword or keyword phrase.
2. In the **Keywords** panel, click **Delete.**

   The selected word or phrase is removed from the **Keywords** field. If you select a word that appears within a keyword phrase, the entire phrase is removed.
3. To delete all keywords, click **Clear.**

Multipage Indicator

A **multipage indicator** is text that E-Capture Server uses to differentiate between multipage forms. You can use the signature, for example, if it is listed on each page of the form. The most common multipage indicators are *Page* and *of* to indicate **Page X of XX.**

If a MASTER or SLAVE form is assigned to the template, the multipage indicator feature cannot be used, and the **Multipage Indicator** field must be empty.

To use this feature, in the **Pages in Form** panel, select the **Variable** radio button.

Selecting a Multipage Indicator

To select a multipage indicator, perform the following steps:

1. In the **Document Text** area, highlight a multipage indicator from the **second** page of the form.

   Your selection must indicate that the form has multiple pages.
2. In the **Multipage Indicator** panel, click **Set.**

   The selection appears in the field.

Figure 47: Selecting a multipage indicator for forms with more than one page

3. To delete the selection, click **Clear.**

Rules for Selecting a Multipage Indicator

Review the following rules for selecting a multipage indicator:

- A multipage indicator selection cannot contain commas.
- The total length of the selection cannot exceed 20 characters.

Selecting a Signature

Signatures often use a standard and identifiable format. For example, signatures may contain the date and edition number of the form. If signatures on your forms share a standard, you can use the signature as a means of validation. You can prepare custom scripts to implement the validation.

Selecting a signature is similar to selecting a keyword. To select a signature, perform the following steps:

1. In the **Signature Exists** panel, select the correct option, as described in the following table:

Signature Exists options	
Name	**Description**
Every Page	**Every Page** is selected if the signature appears on each page of a multipage form.
First Page Only	**First Page Only** is selected if the signature appears on the first page of a form.
No	**No** is selected if the form does not have a signature. **No** is selected by default.

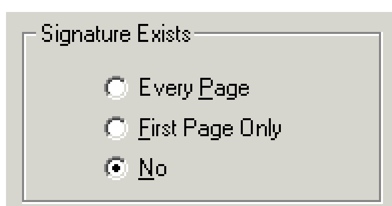


Figure 48: Selecting the correct option in the Signature Exists panel

2. In the **Page Listing Exists** panel, select **Yes** only if the following conditions apply:
   - The source template file is paginated.
   - A multipage indicator is selected.
   - The number of pages in the form varies, for instance, if you selected **Variable** in the **Pages in Form** panel in the **General** tab.

Figure 49: Selecting a pagination option

3. If you select **Fixed** in the **Pages in Form** panel in the **General** tab, in the **Pages Listing Exists** panel, select **No.**
4. In the **Document Text** area, highlight the signature.

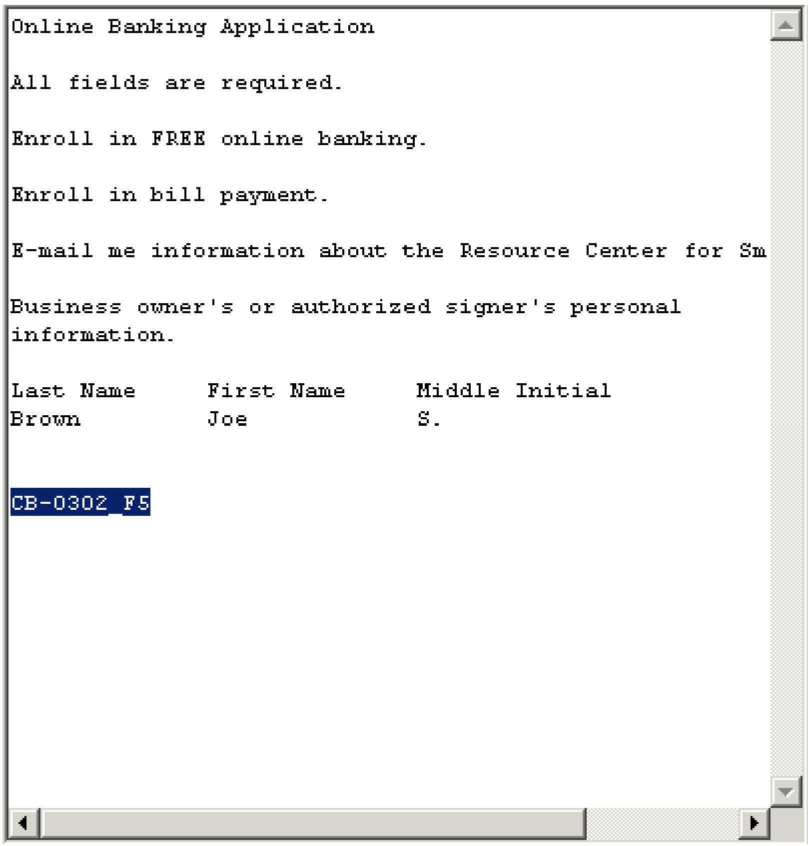


Figure 50: Highlighting the template file's signature

5. In the **Signature** panel, click **Set.**

Figure 51: Using the Signature panel to apply signature selection

The captured signature appears in the **Signature** field.

Verifying Coordinates of the Selected Text

To verify the coordinates of the selected text, in the **Signature** tab, click **Select.**

The coordinates of the selected text appear in the **Left, Bottom, Right,** and **Top** fields.

This information is used when the strip border is selected for the signature or keywords in the **General** tab.

Modifying and Deleting a Signature

To prevent spelling errors, text cannot be typed into the **Signature** field. To modify or delete a selected signature, perform the following steps:

1. In the **Signature** panel, click **Clear.**
   The selected signature is removed.
2. To select a new signature, follow the steps for selecting a signature as described in Selecting a Signature.

Rules for Selecting a Signature

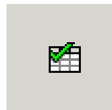
Review the following list of rules for selecting a signature:

- The signature cannot contain commas.
- The total length of the signature cannot exceed 20 characters
- The signature field can contain only one selection.

Modifying a Registered Form

To modify the general attributes, signature, keywords, and virtual calculation tables of a registered form, perform the following steps:

1. In the **E-Capture Definition Utility** window, select the form to modify.
2. Double-click the form, or click **Modify.**



The **Edit Form** window appears.

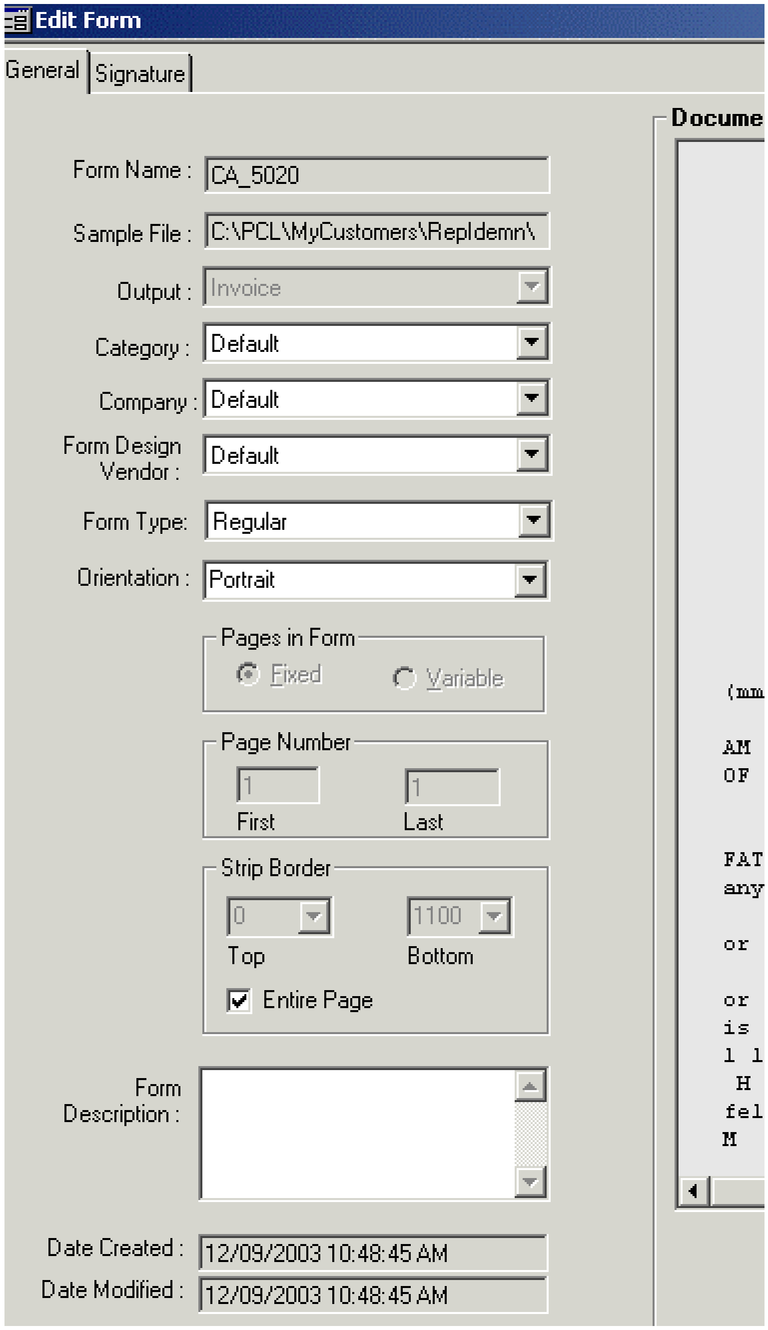


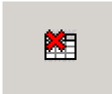
Figure 52: Modifying a registered form using the General tab

3. To modify form attributes, use the **General** and **Signature** tabs as described in Registering a Form. In the **General Tab,** you can modify all attributes except the following:
   - form name
   - source file path
   - output group assigned to the form
   - numbers of the first and last pages of the form template
4. To save the changes, click **OK.**

Deleting a Registered Form

To delete a registered form, perform the following steps:

1. In the **Registered Form** window, select the form you want to delete.
2. Click **Delete.**



A confirmation window appears.

3. To delete the form, click **Yes.**
4. To cancel your request, click **No.**

Mapping a Form

The following topics are described in this section:

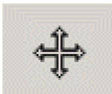
- Map Form Tool
- Mapping a Field
- Modifying a Mapped Field
- Deleting a Mapped Field

Map Form Tool

The **Map Form** tool is used to select locations containing information you want to capture, and to specify how you want this information entered in an Exigen Workflow database.

To map a form, perform the following steps:

1. In the **E-Capture Definition Utility** window, select the form you want to map.
2. In the toolbar, click **Map Form.**



The **Form Definition Details** window appears.

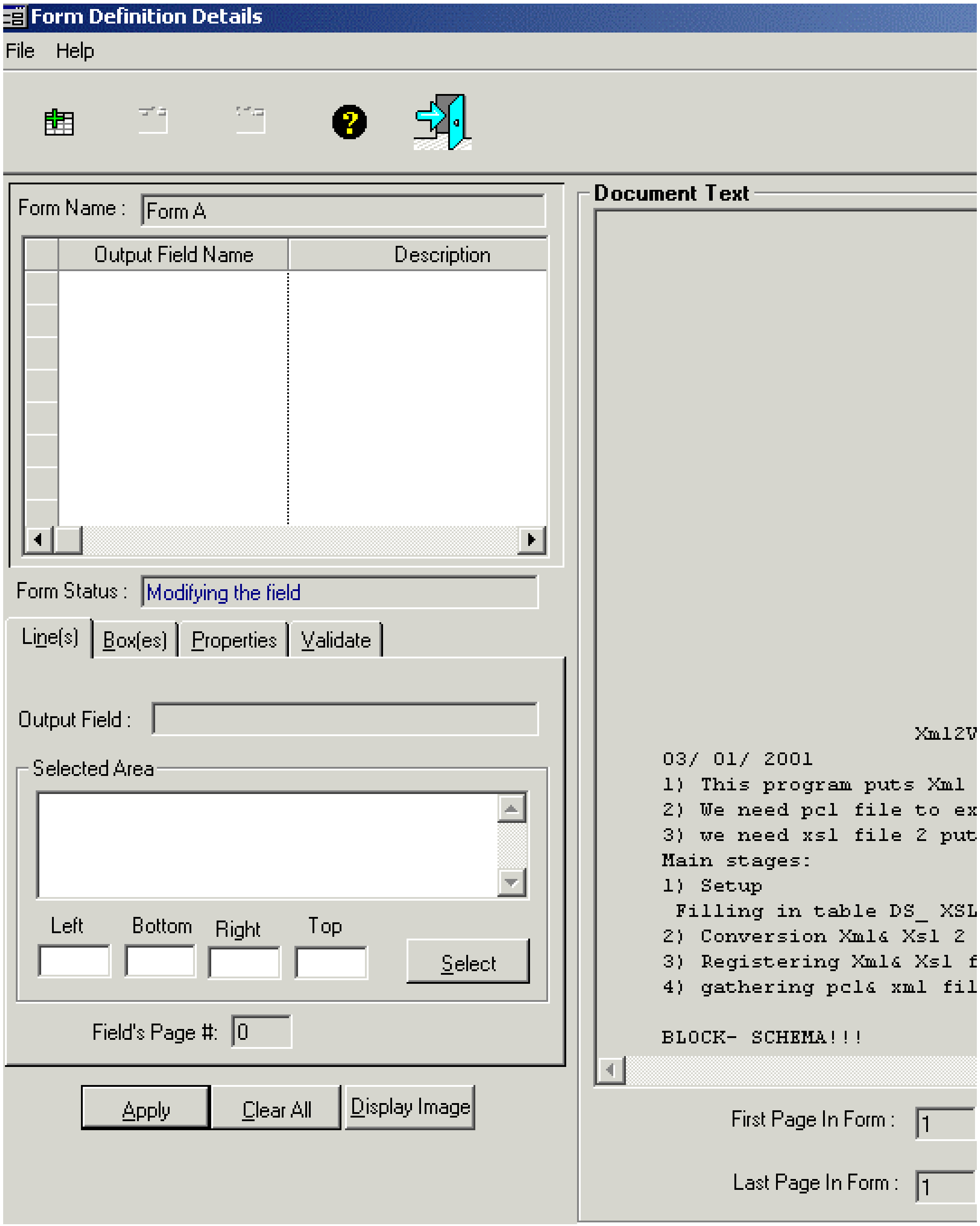


Figure 53: Mapping form with Line(s) tab

The **Form Definition Details** window displays the name of the form in the **Form Name** field. The **Document Text** area displays the text of the form template.

3. To view the document text, use the navigation panel located under the **Document Text** area.
4. To view the original template PDF or PCL source file, click **Display Image.**
5. To add, modify, and delete mapped fields, use the **Form Definition Details** interface.

   These procedures are described in the following sections.

6. To save the form map, click **Apply.**

Mapping a Field

The following topics are described in this section:

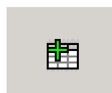
- Selecting an Output Field
- Selecting Text for Capture
- Additional Settings

Selecting an Output Field

E-Capture Administrator is used to define output fields.

To select an output field, perform the following steps:

1. In the **Form Definition Details** window, click **Add.**



The **Output Fields** window appears.

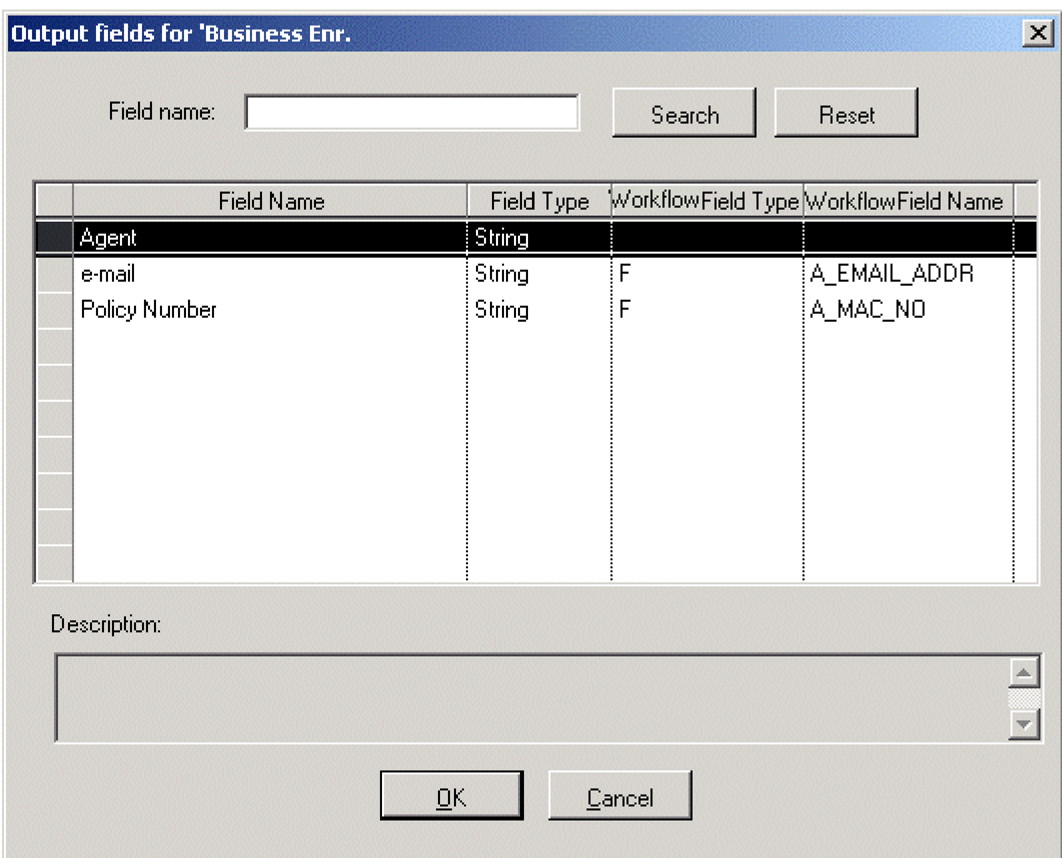


Figure 54: Selecting an output field

The **Output Fields** window displays all fields assigned to the output group named in the title bar. Each record also displays the E-Capture field type, workflow field type and workflow field name associated with the field. If a SLAVE template is used, the registered folder, subfolder, and document fields are not displayed.

2. Select an output field.

   You can also search for an output field by exact name or partial name.

3. To search for the field name, perform the following steps:
   1. In the **Field Name** field, enter the exact name or a character string, replacing the unknown portion of the name with %.
   2. Click **Search.**
      Records of fields containing the name or character string are displayed. If no matches are found, the table does not show any records.
   3. To clear the search and return to the complete list of output fields, click **Reset.**

4. Click **OK.**

   The name of the field you selected appears in the **Form Definition Detail** window in the **Output Field.**

   The **Form Status** field displays the following message:

   ```
   Adding a new field.
   ```

Selecting Text for Capture

E-Capture Definition Utility is used to select lines and boxes of text for capture from the **Document Text Area.**

To select individual words or a phrase contained in one line of text, use the **Line(s)** tab.

If you select multiple lines of text using the **Line(s)** tab, the top leftmost and the bottom rightmost words define the text coordinates. This can lead to a conflict between the right and left coordinates in cases where the text area in the question is not completely filled. To resolve this problem, use the **Box(es)** tab to select the text.

To select text using the **Line(s)** tab, perform the following steps:

1. In the **Form Definition Details** window, select the **Line(s)** tab.

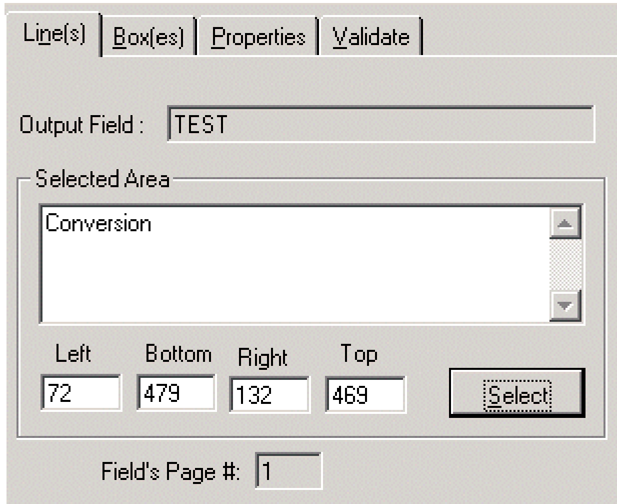


Figure 55: Selecting text with the Line(s) tab

The selected output field appears in **Output Field.**

2. In the **Document Text** area, highlight the text you want to assign to the selected field.

   The selection can be a single word, several words, or several rows of text, but cannot contain commas.

3. Click **Select.**

   The text appears in the **Selected Area** text field of the **Line(s)** tab. The **Field's Page #** field displays the page number on which the selected text is located.

   The numerical coordinates of the selected area appear in the **Left, Bottom, Right,** and **Top** fields.

4. If necessary, to extend the selection area, change the numerical coordinates manually.
5. To save your selection, click **Apply.**

   The field name appears in the **Output Field Name** table.

6. To delete the selection, click **Clear All.**

To select text using the **Box(es)** tab, perform the following steps:

1. In the **Form Definition Details** window, select the **Box(es)** tab.

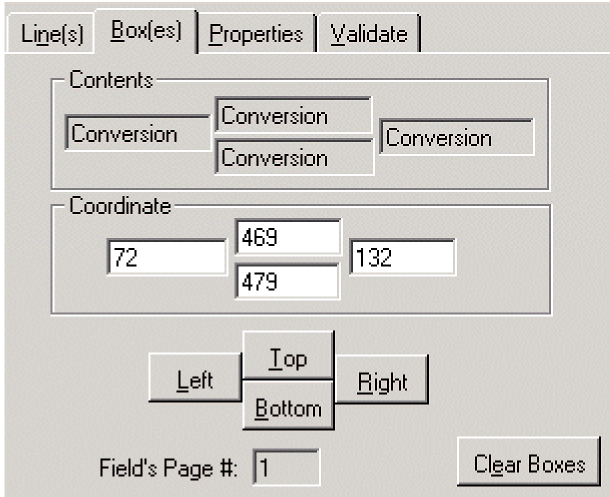


Figure 56: Selecting text with the Box(es) tab

2. Highlight the word at the far left of the rectangle zone in the **Document Text** area.
   For example, to select the box, highlight **TEST.**
3. To apply the selection, click **Left.**
   The selected word and its coordinate appear in the **Contents** and **Coordinate** panels.
4. Highlight the word at the top of the rectangle zone, for example, **TEST.**
5. To apply the selection, click **Top.**
6. Highlight the word at the far right of the rectangle zone, for example, **23356.**
7. To apply the selection, click **Right.**
8. Highlight the word at the bottom of the rectangle zone, for example, **23356.**
9. To apply the selection, click **Bottom.**
10. To cancel your selection, click **Clear Boxes.**

Additional Settings

E-Capture Server processes and verifies the data in each mapped field according to default settings. The default procedures can be changed using the following tabs:

- Properties
- Validate

Properties

The **Properties** tab is used to modify default procedures regarding error messages and temporary data storage.

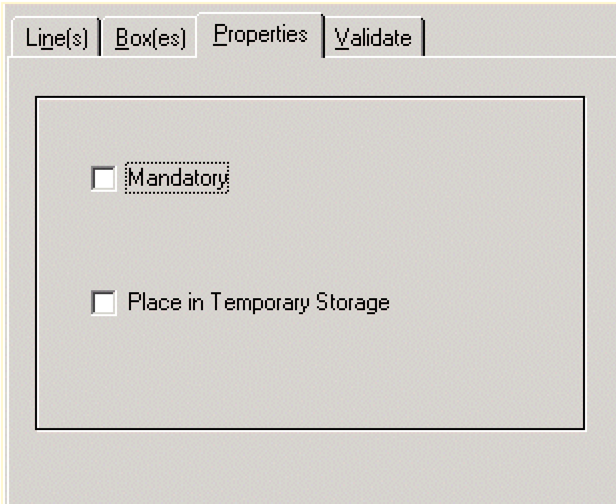


Figure 57: Selecting processing options with the Properties tab

To use the **Properties** tab, perform the following steps:

1. To send an error diagnosis to Exigen Workflow if the mapped field does not contain data using E-Capture Server, select **Mandatory.**

   A custom script can be used to handle this problem.

2. To place extracted data into the **Temporary Storage** table using E-Capture Server, select **Place in Temporary Storage.**

   While in the **Temporary Storage** table, the data is available to other applications.

Validate

The **Validate** tab is used to have E-Capture Server validate and transform the data contained in the field.

Examples of simple transformations include changing case and date format. Custom scripts are used to handle these and all other validation and transformation requirements.

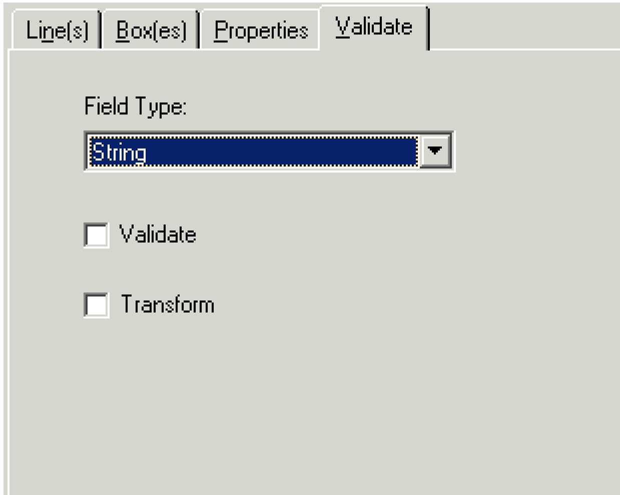


Figure 58: Selecting processing options with the Validate tab

Selecting either box instructs E-Capture to execute custom scripts prepared to validate and transform data. If no script is used and the **Transform** option is selected, by default, E-Capture Server deletes dashes and blanks from the corresponding extracted text.

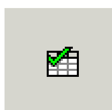
By default, both boxes are cleared.

E-Capture Administrator is used to register and assign scripts.

Modifying a Mapped Field

To modify a mapped field, perform the following steps:

1. In the **Form Definition Details** window, in the list of mapped fields, select the field to modify.
2. Click **Modify.**



   The name of the field you selected appears in **Output Field.**

   The **Form Status** field displays the following message:

   ```
   Modifying the Field.
   ```

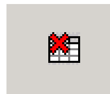
3. To select text and specify handling instructions, use the following tabs:
   - **Line(s)**
   - **Box(es)**
   - **Properties**
   - **Validate**

   For information on using these tabs, see Selecting Text for Capture and Additional Settings.
4. To save the changes, click **Apply.**

Deleting a Mapped Field

To delete a mapped field, perform the following steps:

1. In the **Form Definition Details** window, in the list of mapped fields, select the field to delete.
2. Click **Delete.**



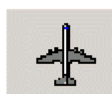
The field is removed from the list of mapped fields.

Testing Form Definitions

Testing a form definition verifies whether the fields you mapped captured the correct data. For example, testing the form definitions verifies if the selected keywords provide the required information, or if you overlooked information that must be mapped.

To test a form definition, perform the following steps:

1. In the **E-Capture Definition Utility** window, select the form you want to test.
2. Click **Test Form.**



The **Verify Input** window opens.

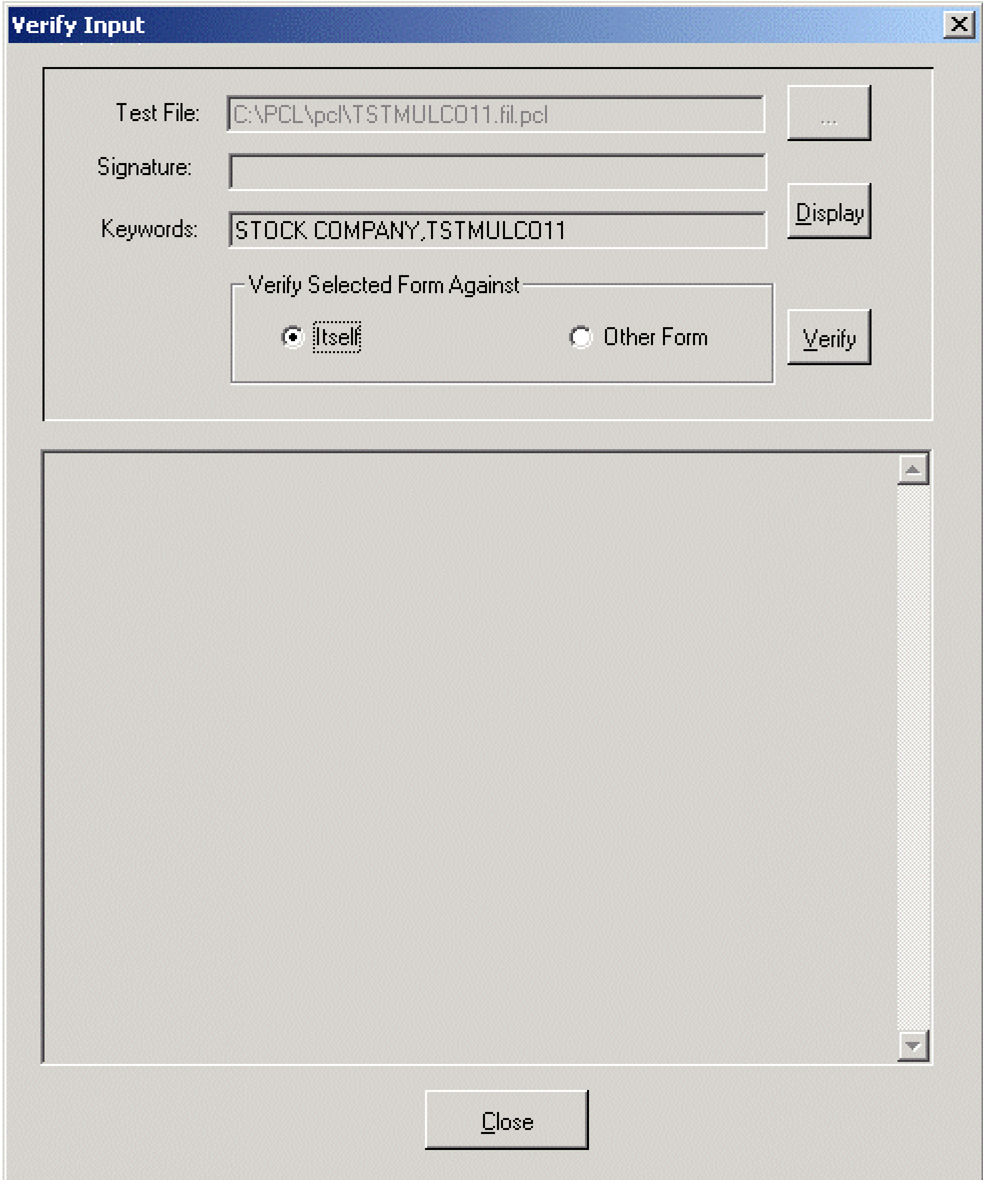
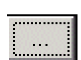


Figure 59: Testing form definition

The **Test File** field displays the name and path of the form template. If a signature exists, the **Signature** field displays it. The **Keywords** field displays all selected keywords.

3. To verify the named form against itself, click **Verify.**
4. To verify the form against another form, perform the following steps:
   1. In the **Verify Selected Form Against** panel, select **Other Form.**
   2. To browse for an alternative file, click the browse button next to the **Test File** field.

      The **Open File** window appears.

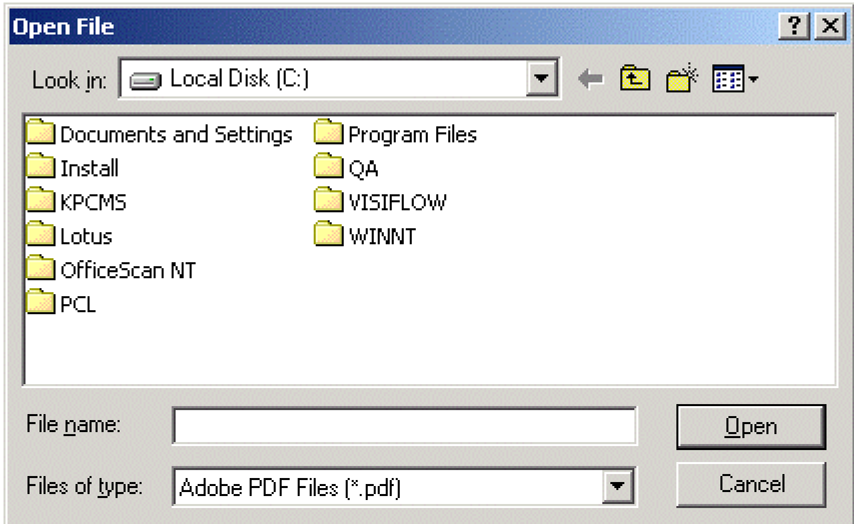


Figure 60: Browsing for an alternative testing template

3. Select a file and click **Open.**
The path and name of the file appear in the **Test File** field.

4. To test the form, click **Verify.**
   Information appears in the **Verify Input** window.

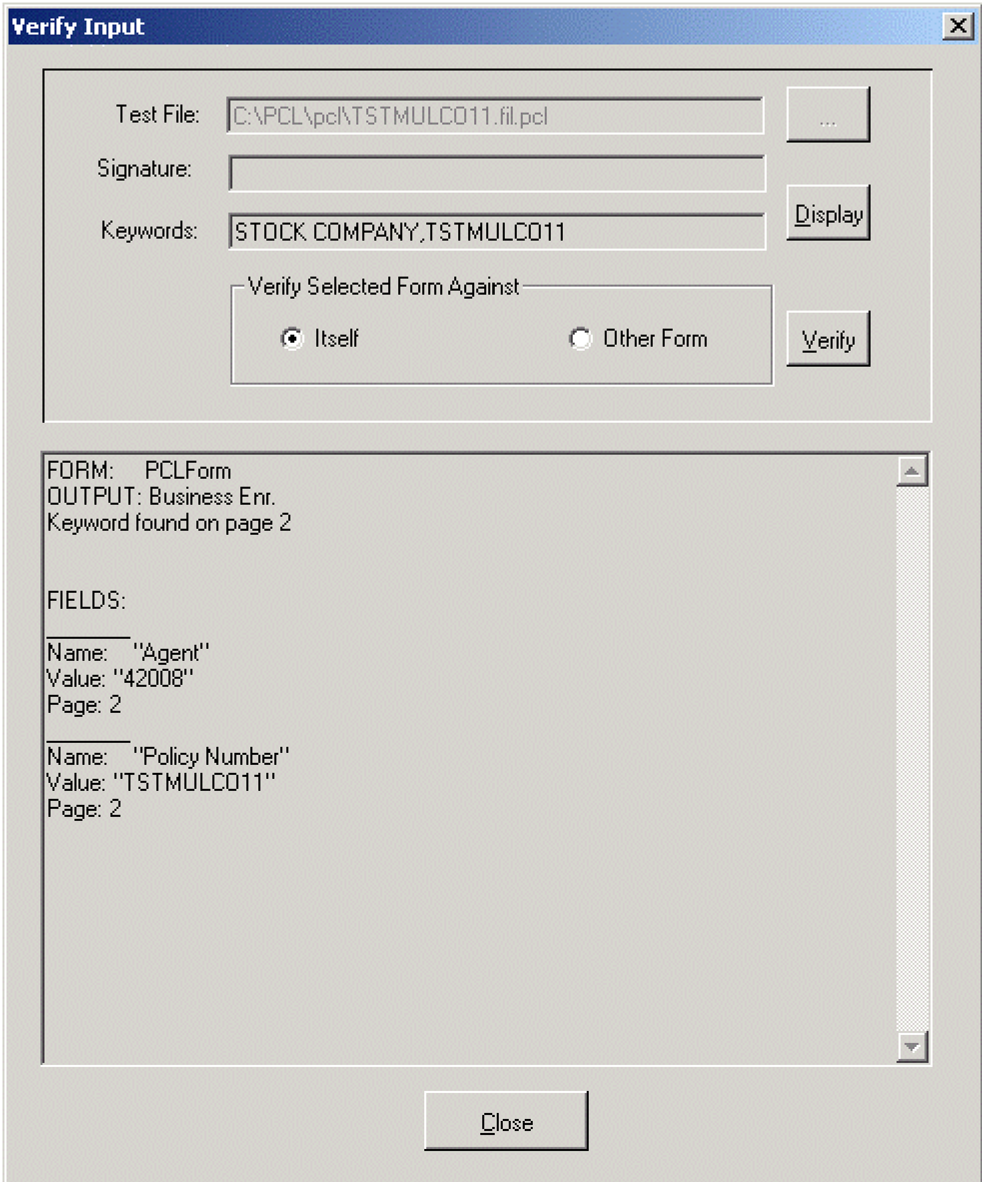


Figure 61: Sample test results

The **Verify Input** window displays the following information:

- form name
- output group
- number of the page on which keywords are located
- names of each mapped field
- extracted data
- number of the page on which the field is located

5. To view the selected form template, click **Display.**
6. To return to the **E-Capture Definition Utility** window, click **Close.**

Exporting and Importing Templates

E-Capture templates can be imported and exported. This makes it possible to use a template in another environment.

An environment is defined by one or more of the following factors:

- network
- computer
- Windows version
- Exigen Workflow project

A template can be imported into an environment that already has registered E-Capture templates. The import procedure checks the integrity of the existing templates and the imported templates.

The import procedure checks E-Capture environment variables that are specified manually in the E-Capture Administrator. The environment variables in the export environment are compared with those in the import environment.

The following topics are included in this section:

- Exporting Templates
- Importing Templates

Exporting Templates

To export templates, proceed as follows:

1. In the E-Capture Definition Utility window, select **File > Export.**
   The **Export Templates Setup** window appears.

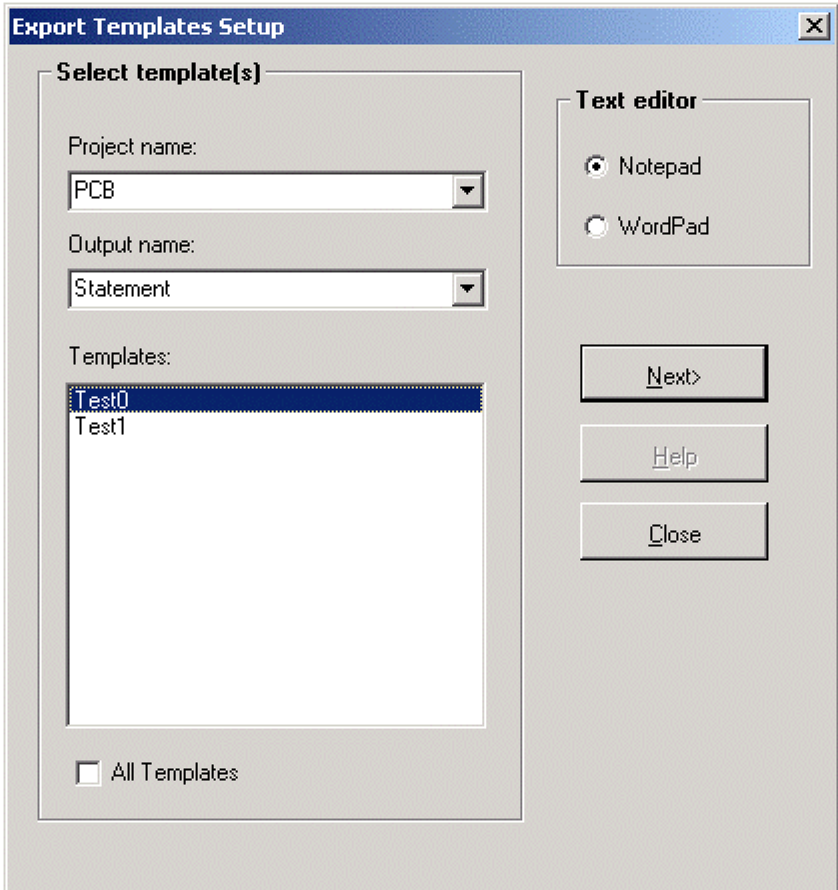


Figure 62: Exporting template setup

2. In the **Project name** list box, select the Exigen Workflow project containing the E-Capture templates to be exported.

   If only one E-Capture project is available, it is displayed and selected by default.

3. In the **Output name** list box, select the output from which the templates are exported. For example, if the templates are assigned **Invoice** output, **Invoice** must be selected.

   All templates from the specified project and with the specified output are displayed in the **Templates** box.

4. In the **Templates** box, select one or more templates to export.
5. To export all templates, select **All Templates.**
6. In the **Text Editor** section, specify the text editor used to edit the exported templates. The following text editor options are available:

   - **Notepad**
   - **WordPad**

   An existing text editor can be changed before exporting templates.

7. To continue the export process, click **Next.**

   The **Export Template Data** window appears.

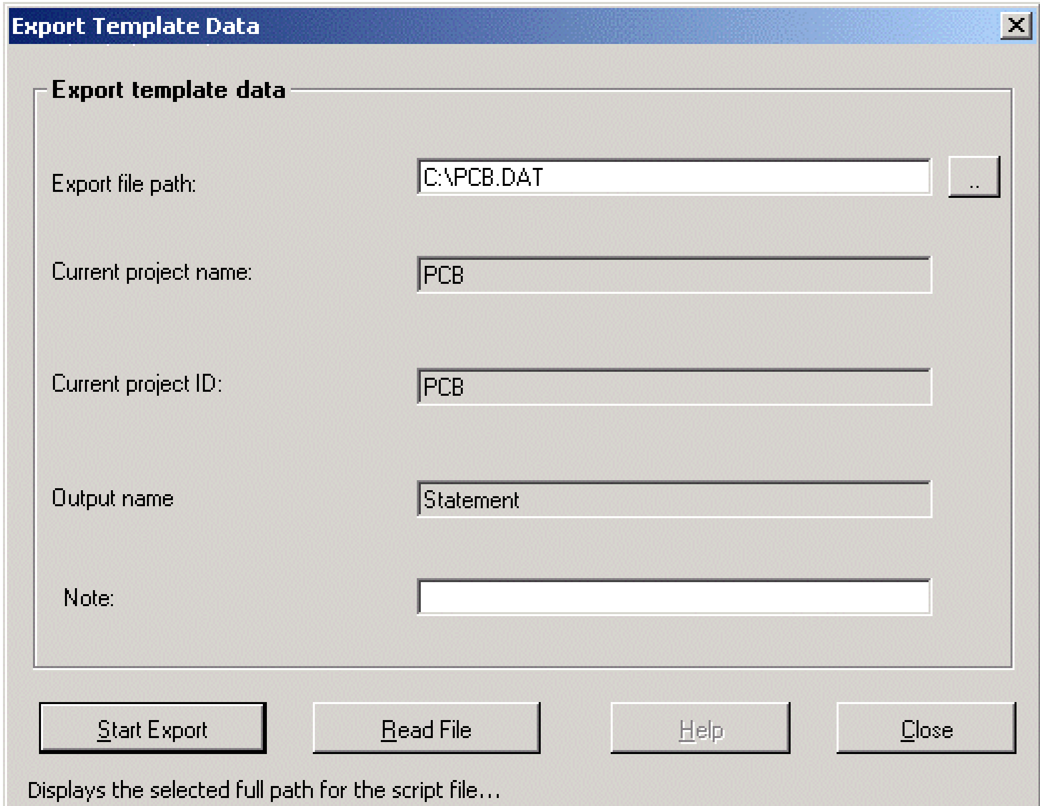


Figure 63: Exporting template data

8. To select an existing path and file name for exporting data, next to the **Export file path** field, click the browse button.
9. To specify a new file for exporting data, in the **Export file path** field, enter the path and file name.
   The file for exported data must have a `.dat` extension. If several templates are exported, all data is exported to a single `.dat` file.
10. In the **Note** field, enter an optional note.
11. To view the template data to be exported, click **Read File.**
12. To start export, click **Start Export.**
    The template files are exported.
13. To close the window, click **Close.**

Importing Templates

During the template import process, the following actions occur:

- The **Import Template Data** window is used to import template-related data.
- The user moves the templates to the new location.

To import templates, proceed as follows:

1. In the **E-Capture Definition Utility** window, select **File > Import.**
   The **Import Template Data** window appears.

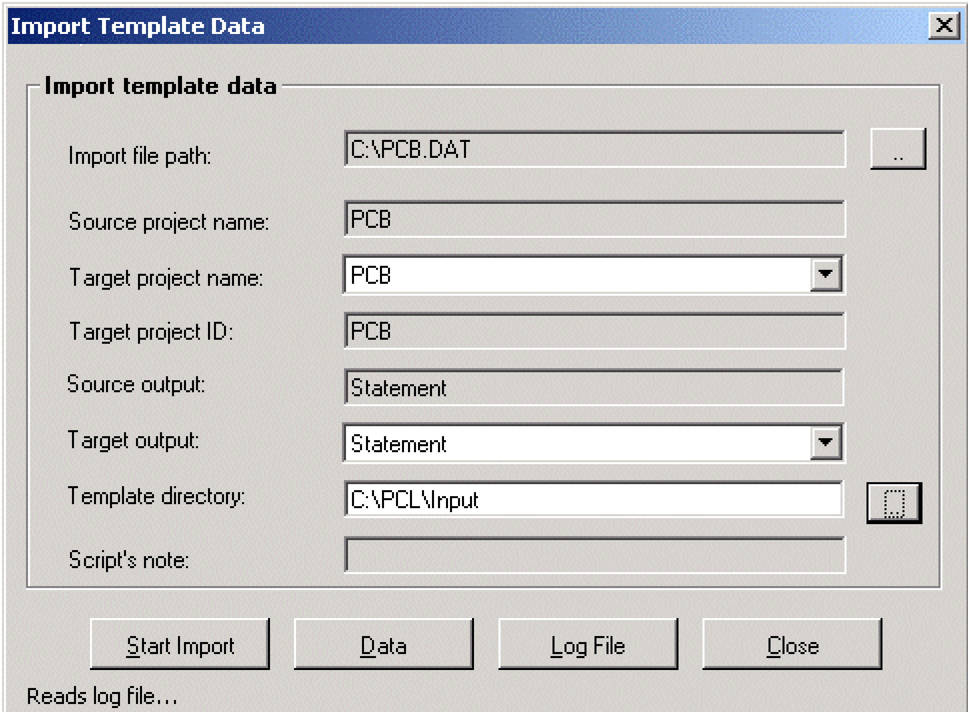


Figure 64: Importing template data

2. To select the path and file name from which template data is imported, click the browse button next to the **Import file path** field.
   The file must have the `.dat` extension.
3. In the **Target project name** field, select the target project for template import.
4. In the **Target output** field, select the destination output for the imported template.
5. To select the directory for the templates, click the browse button next to the **Template directory** field.
   The directory is the location to which the user physically moves the templates.
6. Move the templates to the selected directory.
7. To view the import data, click **Data.**
8. To view a description of possible problems that occurred during export, click **Log File.**
9. To import information related to the templates, click **Start Import.**
10. To close the window, click **Close.**
    The templates are imported.

Chapter 11: Publisher Packager Utility

This section describes the Exigen Publisher system and explains how to use its components. The following topics are described in this section:

- Exigen Publisher System Overview
- Using Exigen Publisher Packager

Exigen Publisher System Overview

Exigen Publisher is a subsystem of Exigen Workflow used to create a collection of documents that is viewable remotely without being connected to the Exigen Workflow system database. Exigen Publisher allows you to gather documents from the Exigen Workflow database into one data collection and to copy them to a CD where they can be viewed from a machine that is not connected to Exigen Workflow.

Exigen Publisher consists of the following components:

- Exigen Publisher Collector
- Exigen Publisher Packager
- Exigen Publisher Cabinet

The following diagram shows how the components in the system work together.

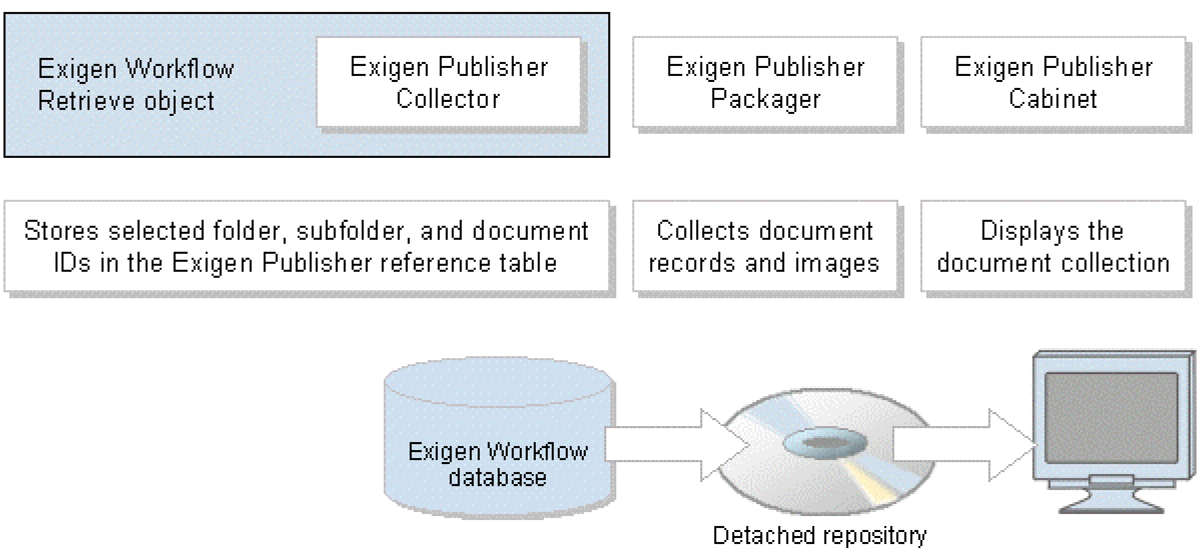


Figure 65: Process of data publishing with Exigen Publisher

Exigen Publisher Collector

Exigen Publisher Collector assembles documents from an Exigen Workflow project into one collection. Each data collection consists of image files, folders, subfolders, and document records collected within the existing Exigen Workflow database. Exigen Publisher Collector is run from the Exigen Workflow Retrieve object.

Exigen Publisher Packager

After a collection of folder, subfolder, and document records and images is created, the Exigen Publisher Packager application is run to package the data collection together with the Exigen Workflow system files into one directory, which can be written onto a CD. The CD also includes Exigen Publisher Cabinet.

Exigen Publisher Cabinet

Exigen Publisher Cabinet is used to view the data collection that was packaged onto the CD without being connected to the Exigen Workflow system.

Exigen Publisher components must be installed. If Exigen Publisher is not installed, perform the following steps:

1. Insert the Exigen Workflow installation CD and run `setup.exe`.
2. In the **Exigen Workflow Setup** window, select **Upgrade and Modify.**
3. In the **Select Components** window, under **Workflow Optional Components,** select **Publisher.**

Using Exigen Publisher Packager

This section describes how to use the Exigen Publisher Packager. The following topics are described in this section:

- Overview
- Preliminaries for Packaging
- Packaging Steps
- CD Contents

Overview

Exigen Publisher Packager is used during the second stage in the file distribution process of Exigen Workflow Publisher. The following actions occur in this stage:

1. The collection of files to be exported is defined.
2. The collection is packaged and copied to a CD.

The packaged data consists of the following contents:

- folder
- subfolder
- document indexing data
- corresponding image files
- Exigen Publisher Cabinet application

Exigen E-Forms documents cannot be viewed in Exigen Publisher Cabinet.

Preliminaries for Packaging

Before running Exigen Publisher Packager, create a collection of document records and images using Exigen Publisher Collector. For more information about Exigen Publisher Collector, see the *Exigen Workflow User's Guide,* Chapter 10: Exigen Publisher Collector.

Packaging Steps

To open the Exigen Publisher Packager utility, in Exigen Workflow Explorer, in the **Utilities** folder, double-click **Publisher Packager.**

Exigen Publisher Packager consists of the following steps:

- Step 1. Creating a CD Export Directory
- Step 2. Creating a Copy Directory
- Step 3. Finishing the Export Process

Step 1. Creating a CD Export Directory

When Exigen Publisher Packager is launched, the **Create CD Export Directory: Step 1 of 3** window appears.

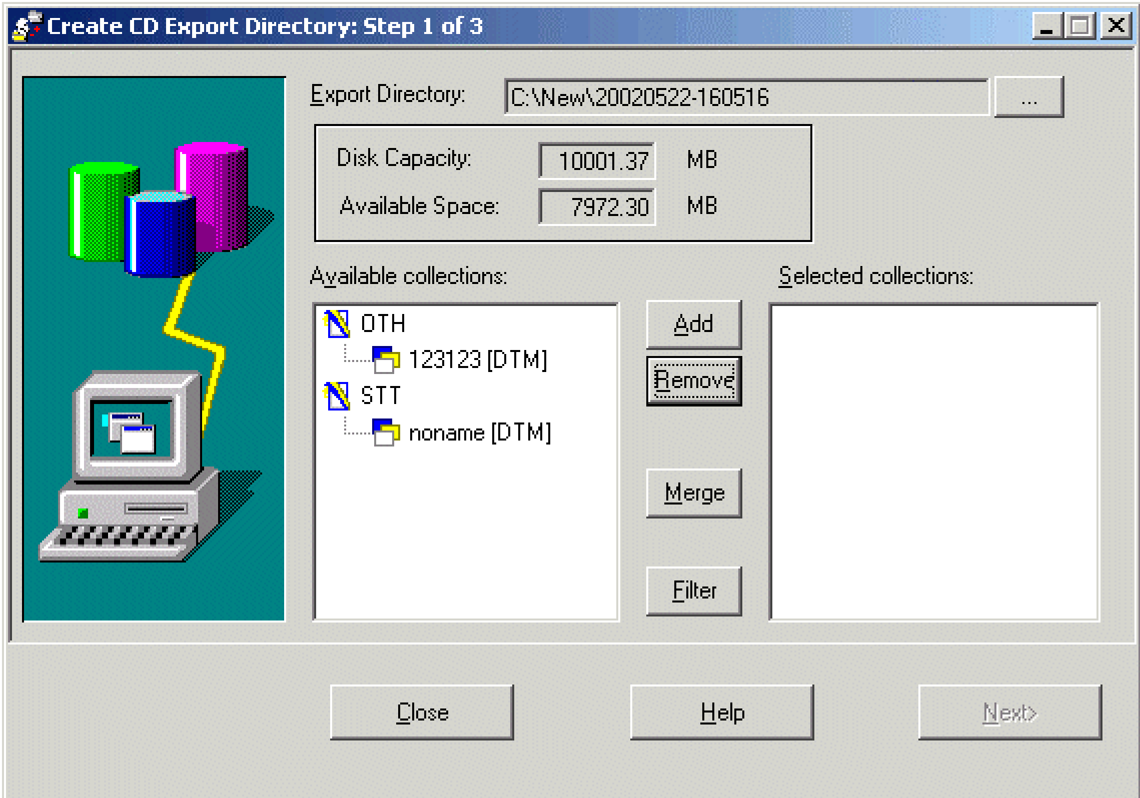


Figure 66: Creating CD Export Directory: Step 1 of 3

The **CD Export Directory** window contains the following fields:

Create CD Export Directory window fields	
Field	**Description**
Export Directory	Destination directory where the data is published before it is copied onto a CD. The collection is saved in a new directory with a unique name, which includes the packaging date and time.
Disk Capacity and **Available Space**	Fields that display the disk capacity and available space according to the specified destination.
Available collections	Field that displays the Exigen Workflow projects with collections available for copying.
Selected collections	Field that displays the collections selected for copying onto the CD.

To work with collections, perform the following steps:

1. To add collections to the directory, select the collections you want to copy onto the CD and click **Add.**

   The selected collections are disabled in the **Available collections** list.

2. To remove a collection from the **Selected collections** list, click **Remove.**
3. To merge several collections into one, select them in the **Selected collections** list and click **Merge.**

   A new window appears, prompting you to enter a name for the merged collection.

4. To find a collection, click **Filter.**

   The **Filter** window appears.

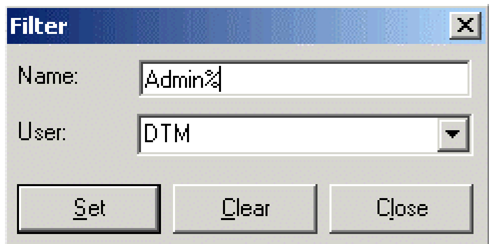


Figure 67: Filter window

   In this window, you can specify a collection or multiple collections that appear in the **Available collections** field.

5. To display a particular collection, enter the collection's name in the **Name** field and click **Set.**

Note: Use the "%" symbol in the **Name** field to represent one symbol or several symbols in the name of collections to be displayed. The "%" symbol is used to display a range of collections with a similar name pattern.

6. To display collections of a particular user, in the **User** dropdown list, select the user and click **Set.**

   The **Name** and **User** fields can be used simultaneously.

7. To empty both fields, click **Clear.**
8. To exit the **Filter** window without filtering, click **Close.**
9. When all required collections are in the **Selected** list, click **Next.**

Step 2. Creating a Copy Directory

The **Create Copy Directory: Step 2 of 3** window appears.

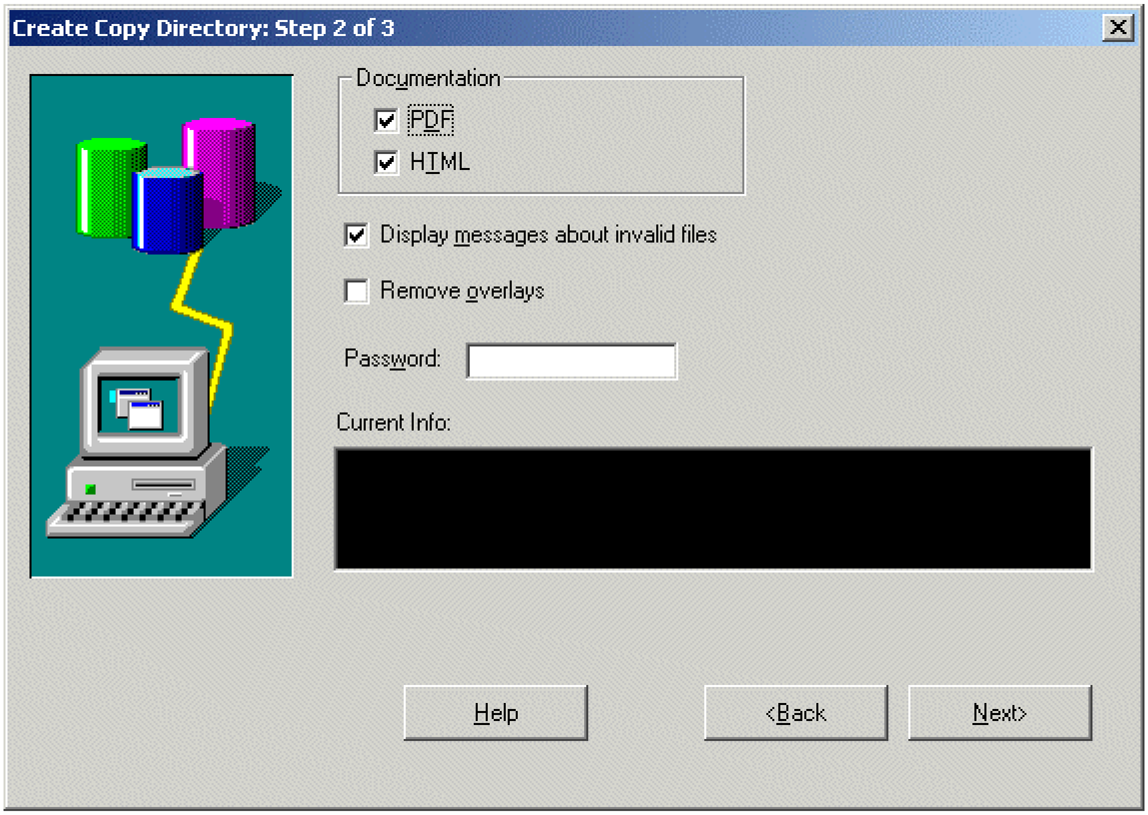


Figure 68: Creating Copy Directory: Step 2 of 3

The following check boxes are used to set conditions for the packaging process:

Creating Copy Directory, Step 2, options	
Option	**Description**
PDF	*Exigen Publisher Cabinet User's Guide* in PDF format is copied onto the CD.
HTML	*Exigen Publisher Cabinet User's Guide* in HTML format is copied onto the CD.
Display messages about invalid files	Error messages that occur while processing the files are displayed.
Remove overlays	Image overlay documents are not packaged in the repository.

To set conditions for the packaging process, perform the following steps:

1. In the **Create Copy Directory** window, select the appropriate options.
2. In the **Password** field, enter the password that is used later when opening Exigen Publisher Cabinet.

   The **Current Info** field displays information about the current status, for example, a warning that the selected directory is not empty.
3. When all the fields in this step are complete, to begin copying the packaged data, click **Next.**

The application starts packaging the files and displays the current operation in the **Current Info** window.

If the **Display messages about invalid files** check box is selected in the **Setup** window, a message window is displayed when a problem occurs.

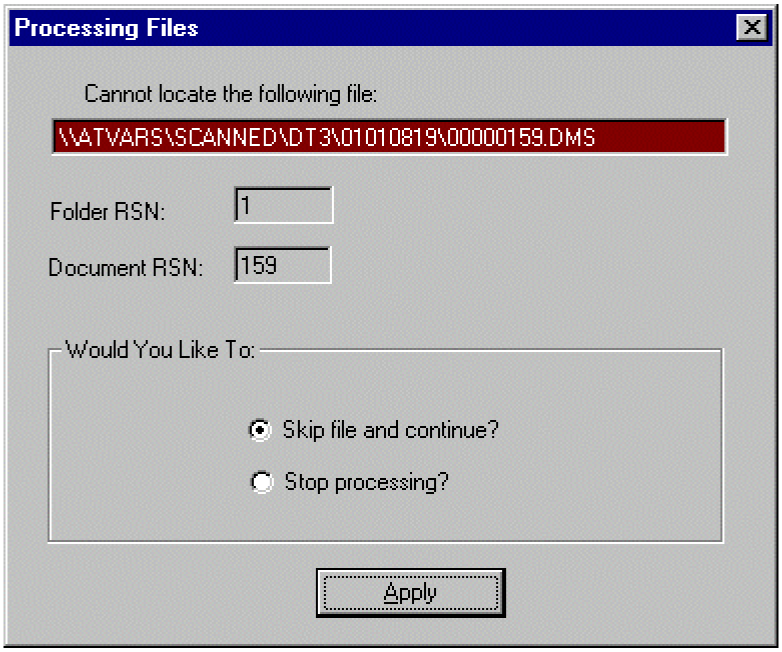


Figure 69: Processing Files error message window

The full name of the missing file is displayed in the **Cannot locate the following file** field.

The **Processing Files** window also displays the Folder RSN and Document RSN. These are internal numbers assigned to each folder, document, batch, parcel record, and other records in the Exigen Workflow database.

4. If the **Processing Files** window appears, in the **Would You Like To** section, select either of the following options:
   - To end the search and continue the copy process, **Skip file and continue.**
   - To end the copy process, **Stop processing.**
5. When the packaging process is complete, to proceed to the third step, click **Next.**

Step 3. Finishing the Export Process

During the final step, it is possible to make manual changes to the copy directory that was created in step 2.

As the packaged data is created, the **Export Finish: Step 3 of 3** window appears.

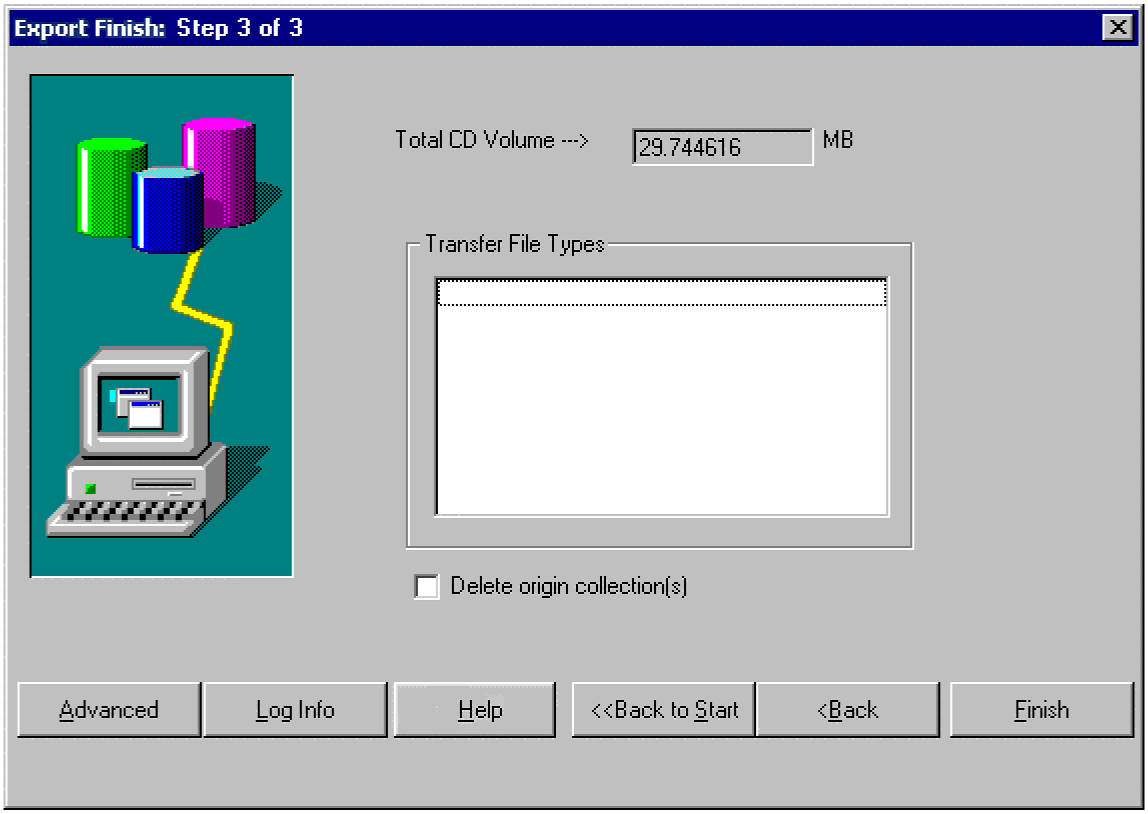


Figure 70: Export Finish: Step 3 of 3

The **Total CD Volume** field indicates the number of megabytes that are used on the CD for the current collection.

The **Transfer File Types** window displays the actual image file types in the collection. In the previous example, only DMS files were copied. The following file types can be included:

- DOC
- TXT
- XLS
- any other file type used within the Exigen Workflow system

If the **Delete origin collection(s)** check box is selected, the packaged collection is deleted from the Exigen Workflow database after it is packaged.

To make manual changes to the packaged files, perform the following steps:

1. Click **Advanced.**

   The **Manual Changes** window appears.

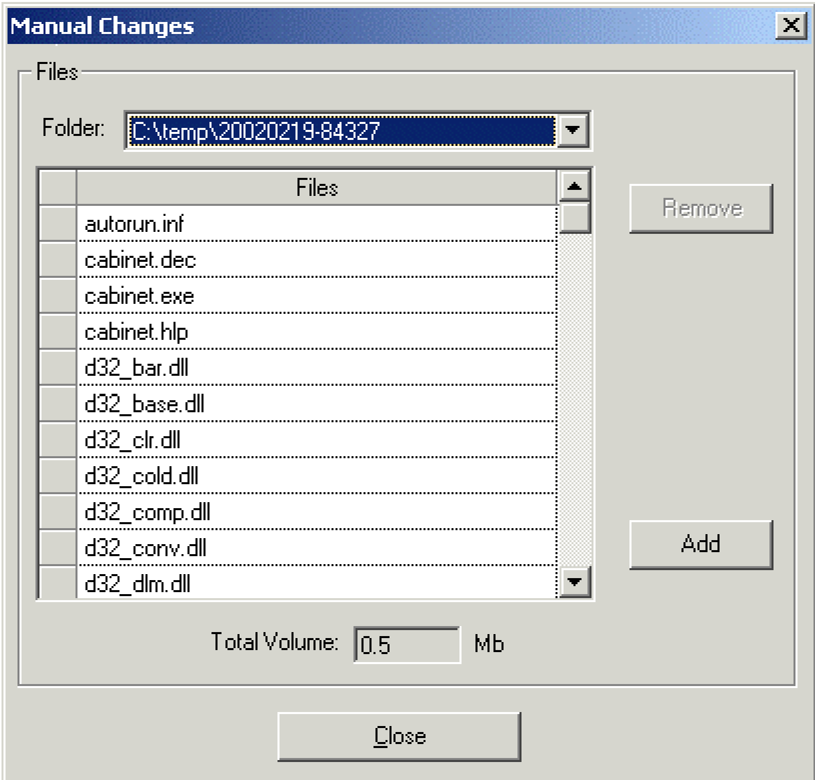


Figure 71: Manual Changes window

2. Specify the files to add to or delete from the final package.

   In this window, you can remove or add files. The **Folder** drop-down list contains paths to the export directory and its subdirectories. A list of files appears in the **Files** table when a directory is selected.

3. To remove a file, select the file and click **Remove.**

4. To complete the process, click **Close.**

5. To add a file, perform the following steps:

   1. Click **Add.**
      The **Find File** dialog box appears.
   2. Select the file to be added.
   3. In the **Folder** drop-down list, specify the directory where the file is to be added.
   4. Select one of the options listed in the following table:

Add file directory, folder dropdown options	
Option	**Description**
Etdm	Exigen Workflow ERM data files and respective templates.
Ftx	Files required to perform Full Text Search.
Image	All image files in the collection.
Info	All information files, such as `message.txt`, associated with the collection.

Add file directory, folder dropdown options	
Option	**Description**
Task	Files that are not processed internally by Exigen Workflow, such as Word and Excel files.
Xml	Reference files in XML format. These files are used internally and contain essential information for opening images.

The last six directories reside in the root directory specified in step 1 of the package-creation process.

5. To complete the process, click **Close.**
   The **Total Volume** value indicates the total size of the files to be copied onto the CD. This value changes as files are added to or deleted from the export directory.

6. If system files, folders, or documents could not be copied into the export directory, to view the information, click **Log Info.**

   The **Missing Files** window appears.

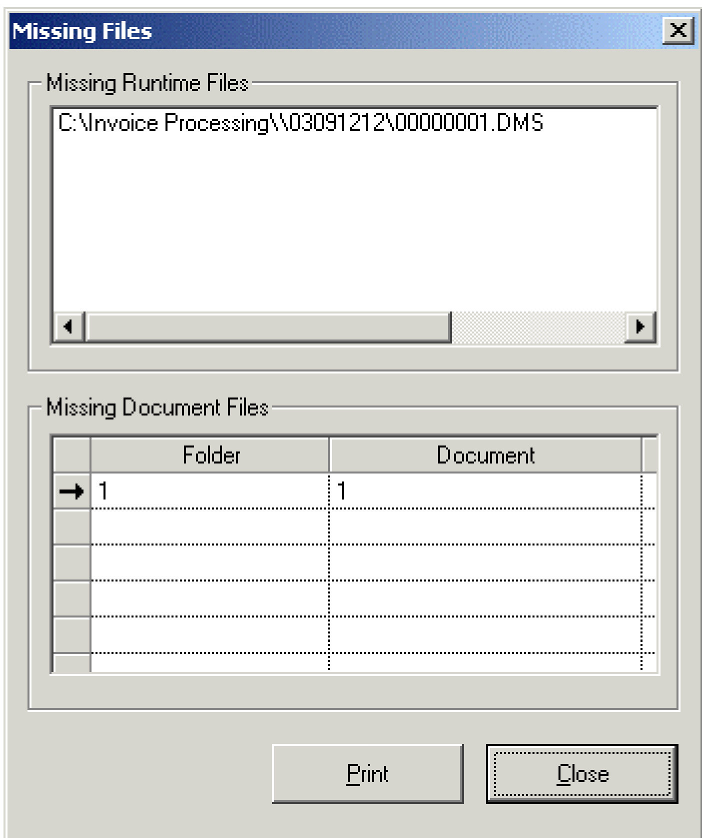


Figure 72: Missing Files window

The **Missing Runtime Files** section lists any files that are necessary to run Exigen Workflow from the CD but could not be copied.

The **Missing Document Files** section lists the folder numbers and document numbers for any documents that could not be copied.

7. To open the `packlog.txt` file in Notepad, click **Print.**
   This file can be printed.
8. To exit the **Missing Files** window, click **Close.**
9. To complete the packaging process, click **Finish.**

CD Contents

The export directory contains the following contents:

Folders	Files		
ETDM	autorun.inf	d32_enh.dll	d32_sms.dll
Image	cabinet.dec	d32_eti.dll	d32_tifs.dll
Info	cabinet.exe	d32_etv.dll	d32_view.dll
Task	cabinet.hlp	d32_etz.dll	d32_word.dll
Xml	d32_bar.dll	d32_gbvw.dll	d32_xls.dll
	d32_base.dll	d32_gui.dll	Exigen Publisher Cabinet User Guide.pdf
	d32_clr.dll	d32_mnr.dll	mfc42.dll
	d32_comp.dll	d32_ocr.dll	msvcrt.dll
	d32_conv.dll	d32_prfx.dll	msvcrtd.dll
	d32_dlm.dll	d32_rus.dll	redirect.ini
	d32_dsp.dll	d32_serv.dll	sm.dll

The contents of the export directory can be copied onto a CD or be distributed by other means, such as email.

Chapter 12: Migration Utility

This section describes how to migrate document versions from the XML based versioning mechanism to the database based versioning mechanism using Migration Utility.

The following topics are described in this section:

Migration Utility Overview

Migration Utility is an application that converts existing XML based document versions used in previous Exigen Workflow versions to the new database based document version format.

Migration Utility must be used only when XML based document versions are already present in the system and Exigen Workflow is upgraded to use the new versioning mechanism.

Migrating Document Versions

To migrate document versions using Migration Utility, proceed as follows:

1. In the `<Exigen Workflow installation directory>\SYSTEM` directory, launch the `utilvers.exe` file.

   The Exigen Workflow login window appears.
2. Enter the user name and password.
3. Click **Connect.**

   The **Migration Utility** window appears with the **Start** tab displayed.

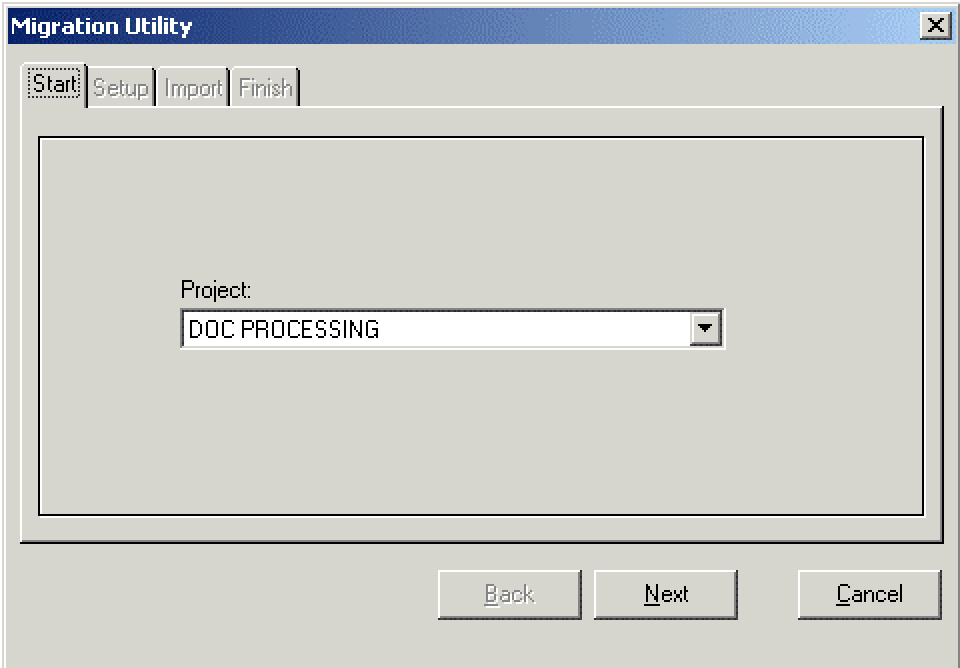


Figure 73: Selecting the project

4. In the **Project** list box, select the project in which document versions must be converted.
5. Click **Next.**
   The **Setup** tab is displayed.

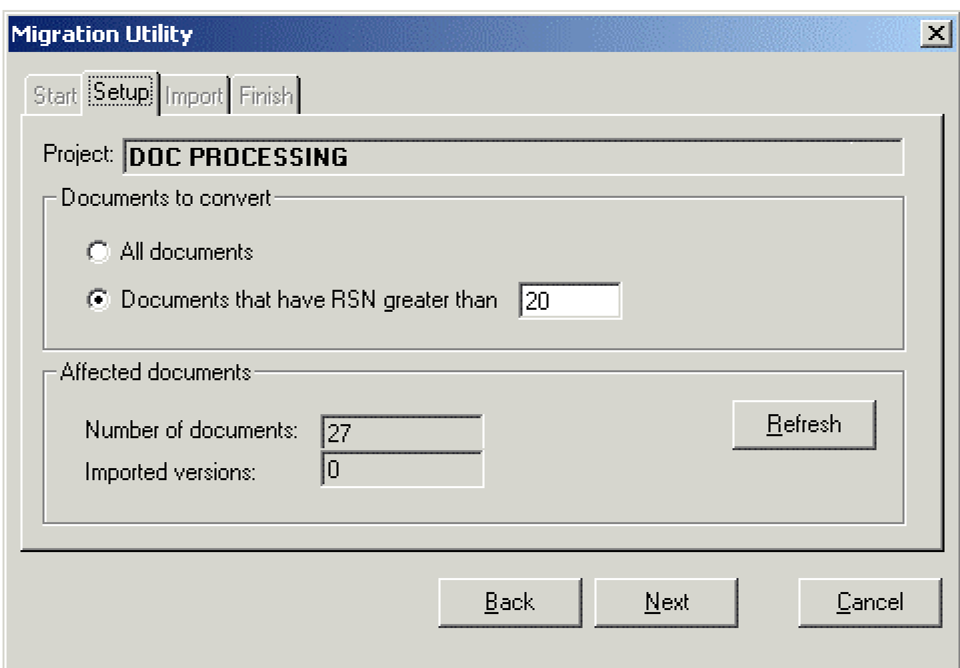


Figure 74: Selecting documents to convert

The **Number of documents** field displays the number of documents in the selected project that contain versions that must be migrated. The **Imported versions** field displays the number of versions that are already converted in the project.

6. To refresh the **Number of documents** and **Imported versions** fields, click **Refresh.**
7. In the **Documents to convert** box, select one of the following options as appropriate:

Document version conversion options	
Option	**Description**
All documents	Converts all document versions in the project.
Documents that have RSN greater than	Converts all document versions for which the document identifier is greater than the document identifier specified in the field. This option is useful in cases when the conversion process is interrupted. When Migration Utility is launched again, the document identifier of the last processed document is automatically entered in the field.

8. Click **Next.**

   The **Import** tab is displayed.

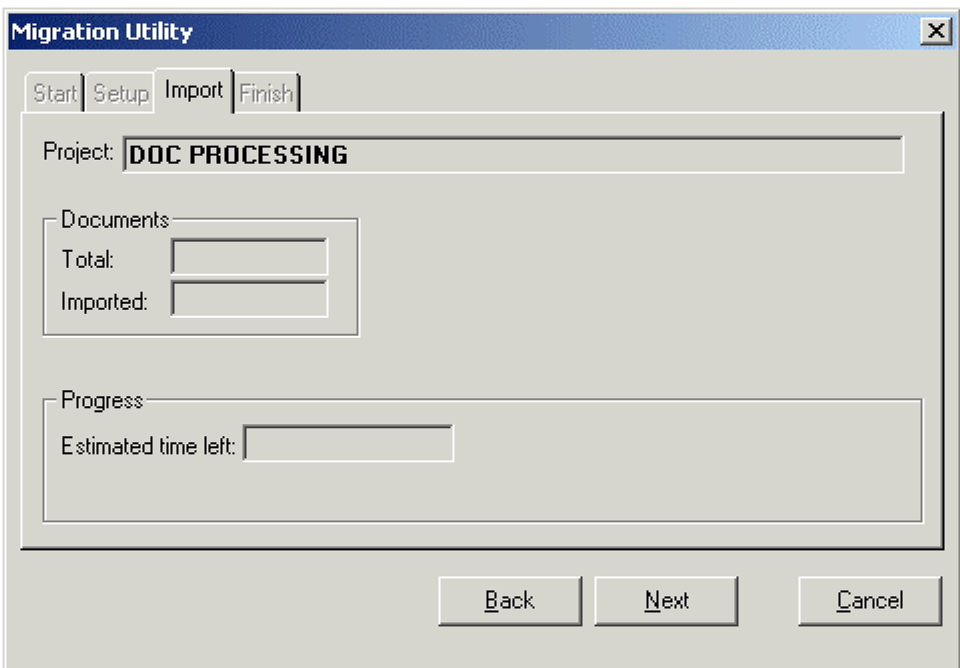


Figure 75: Viewing the conversion progress

9. To convert document versions in the selected project, click **Next.**

   Migration Utility converts document versions. The progress of the conversion is displayed in the **Import** tab.

   When all documents are processed, the **Finish** tab is displayed.

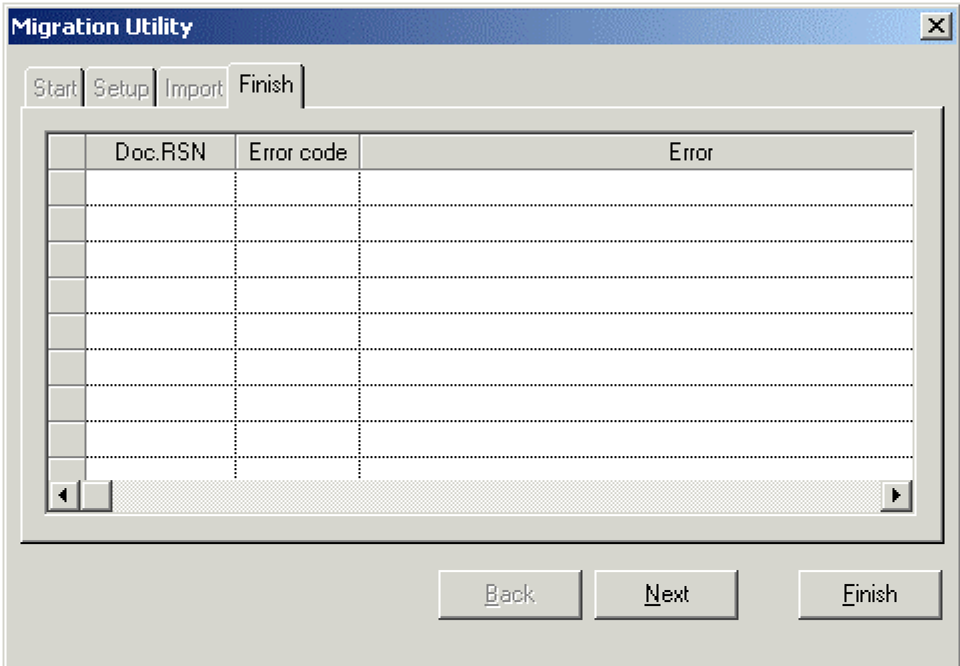


Figure 76: Finishing the migration

If the list in the **Finish** tab is empty, it means that all documents are processed successfully. If any errors are encountered during the conversion, the document identifier of the defective documents and corresponding error messages are displayed in the **Finish** tab.

10. To convert documents in another project, click **Next.**
11. To exit Migration Utility, click **Finish.**

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