

# PaperVision® Capture

## User Guide

Version 85.0



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# CONTENTS

---

## CHAPTER 1 Introduction

|  |    |
|--|----|
| Welcome .....  | 12 |
| System Requirements .....                                    | 12 |
| Minimum Software Requirements .....                          | 12 |
| Minimum Hardware Requirements .....                          | 12 |
| Sharing a Database with PaperVision Enterprise .....         | 13 |
| Terms You Should Know .....                                  | 13 |
| Batch .....  | 13 |
| Batch Priority .....   | 13 |
| Detail Sets .....  | 14 |
| Document .....   | 14 |
| Forms Magic Worker .....                                     | 14 |
| Forms Magic Communication Server .....                       | 14 |
| Forms Magic Project .....                                    | 14 |
| Image .....  | 14 |
| Index .....  | 15 |
| Job .....  | 15 |
| Job Step .....   | 15 |
| Master Batch Repository .....                                | 15 |
| Page .....   | 15 |
| PaperVision Capture Administration Console .....             | 15 |
| PaperVision Capture Automation Service .....                 | 15 |
| PaperVision Capture Data Transfer Agent Service .....        | 15 |
| PaperVision Capture Gateway Server .....                     | 16 |
| PaperVision Capture Operator Console .....                   | 16 |
| Get Product Support .....                                    | 16 |
| Additional Contact Information .....                         | 16 |
| Log In to the Operator Console .....                         | 17 |
| To log in to the PaperVision Capture Operator Console .....  | 17 |
| Log Out of the Operator Console .....                        | 17 |
| To log out of the PaperVision Capture Operator Console ..... | 17 |
| To log out and then log in as another user .....             | 17 |
| Change Your Password .....                                   | 18 |
| To change your password .....                                | 18 |

## CHAPTER 2 Work with Batches

|  |    |
|--|----|
| Batch Overview .....                                       | 20 |
| Batch Grids Summary .....                                  | 21 |
| To update the batches that appear on the batch grids ..... | 21 |
| Batches Waiting Grid .....                                 | 21 |
| Batches Owned Grid .....                                   | 22 |
| Customize Columns on the Batch Grids .....                 | 22 |
| To customize columns on the batch grids .....              | 22 |
| Filter Columns on the Batch Grids .....                    | 23 |
| To filter columns on the batch grids .....                 | 23 |
| Take Ownership of Batches .....                            | 23 |
| To take ownership of a batch .....                         | 23 |
| To take ownership of and open a batch .....                | 23 |
| Create Batches .....                                       | 23 |
| To create a new batch .....                                | 24 |
| Undo Batch Ownership .....                                 | 25 |



|   |    |
|---|----|
| To undo batch ownership .....                         | 25 |
| Open Batches .....                                    | 26 |
| To open an owned batch .....                          | 26 |
| To take ownership of and open a batch .....           | 26 |
| Submit Batches .....                                  | 26 |
| To submit a complete batch .....                      | 26 |
| To submit an incomplete batch .....                   | 26 |
| To retransmit a batch .....                           | 26 |
| Specify Batch Options .....                           | 27 |
| Batch Creation Options .....                          | 27 |
| To specify batch creation options .....               | 27 |
| Auto Batch Assignment Options .....                   | 27 |
| To specify auto batch assignment options .....        | 27 |
| Batch Population and Refresh Options .....            | 28 |
| To specify batch population and refresh options ..... | 28 |

### CHAPTER 3 Standard Options for Job Steps

|  |    |
|--|----|
| Standard Options Overview .....                        | 30 |
| Standard Toolbar and Menu Commands .....               | 30 |
| Page and Image Options .....                           | 34 |
| Navigate Pages .....                                   | 35 |
| To access page navigation commands .....               | 35 |
| Print Pages .....                                      | 35 |
| To print pages in the current document .....           | 35 |
| Cut, Copy, and Paste Pages .....                       | 36 |
| To cut and paste pages .....                           | 36 |
| To copy and paste pages .....                          | 37 |
| Extract and Copy a Page Region .....                   | 37 |
| To extract and copy a page region .....                | 37 |
| To remove a region .....                               | 38 |
| Delete Pages .....                                     | 38 |
| To delete pages .....                                  | 38 |
| Invert Polarity .....                                  | 39 |
| To invert and save page polarity on pages .....        | 39 |
| Re-Save Pages .....                                    | 40 |
| To re-save pages .....                                 | 40 |
| Import Images .....                                    | 40 |
| To import images .....                                 | 40 |
| Rotate Images .....                                    | 41 |
| To rotate and save images .....                        | 41 |
| Reset Images .....                                     | 42 |
| To reset an image .....                                | 42 |
| Image Information .....                                | 42 |
| To view image information .....                        | 42 |
| Document Options .....                                 | 42 |
| Navigate Documents .....                               | 43 |
| To access document navigation commands .....           | 43 |
| Add Documents .....                                    | 44 |
| To add a document .....                                | 44 |
| Copy Documents .....                                   | 44 |
| To copy a document .....                               | 44 |
| Delete Documents .....                                 | 44 |
| To delete a document .....                             | 44 |
| To delete documents from the Browse Batch window ..... | 45 |
| Insert Document Breaks .....                           | 45 |
| To insert a document break .....                       | 45 |
| Remove Document Breaks .....                           | 46 |

|  |    |
|--|----|
| To remove a document break .....                       | 46 |
| Shuffle Documents to Duplex .....                      | 46 |
| To shuffle a document to duplex .....                  | 46 |
| Merge Like Documents .....                             | 47 |
| To merge like documents .....                          | 47 |
| To undo a document merge .....                         | 47 |
| Document History .....                                 | 47 |
| To view document history .....                         | 47 |
| Batch Options .....                                    | 48 |
| Submit a Complete Batch .....                          | 48 |
| To submit a complete batch .....                       | 48 |
| Submit an Incomplete Batch .....                       | 48 |
| To submit an incomplete batch .....                    | 48 |
| Submit a Batch and Create a New One .....              | 49 |
| To submit a batch and create a new one .....           | 49 |
| Batch Information .....                                | 50 |
| To view batch information .....                        | 50 |
| Browse Batch Window .....                              | 50 |
| To open the Browse Batch window .....                  | 50 |
| To locate documents from the Browse Batch window ..... | 51 |
| To delete documents from the Browse Batch window ..... | 51 |
| To print rows from the Browse Batch window .....       | 52 |
| To export rows from the Browse Batch window .....      | 52 |
| To configure columns on the Browse Batch window .....  | 52 |
| View Options .....                                     | 52 |
| Scale Options .....                                    | 53 |
| To scale an image .....                                | 53 |
| To reset the scale of an image .....                   | 53 |
| Zoom Options .....                                     | 54 |
| To zoom in or out on an image .....                    | 54 |
| To reset the zoom of an image .....                    | 54 |
| Zoom Zones and Scaling (Order of Operations) .....     | 54 |
| To set the Hold Zoom Regions system preference .....   | 55 |
| Single Display View .....                              | 55 |
| To open the single display view .....                  | 55 |
| Multiple Display View .....                            | 56 |
| To open the multiple display view .....                | 56 |
| Toolbars .....   | 56 |
| To display or hide toolbars .....                      | 56 |
| To customize toolbars .....                            | 56 |
| Status Bar .....                                       | 57 |
| To display or hide the status bar .....                | 57 |
| Batch Scroll Bar .....                                 | 57 |
| To display or hide the batch scroll bar .....          | 57 |
| Windows .....  | 58 |
| To display or hide windows .....                       | 58 |
| Thumbnails Window .....                                | 58 |
| To open the Thumbnails window .....                    | 58 |
| Custom Code .....                                      | 59 |
| To execute custom code .....                           | 59 |

## CHAPTER 4 Capture Step

|                             |    |
|-----------------------------|----|
| Capture Step Overview ..... | 62 |
| Import Batch .....          | 62 |
| To import a batch .....     | 62 |
| Scanner Commands .....      | 64 |

## CHAPTER 5 Indexing Step

|   |    |
|---|----|
| Indexing Step Overview .....              | 66 |
| Indexing Toolbar Commands .....           | 67 |
| To access indexing commands .....         | 67 |
| Hand-Key Indexing .....                   | 67 |
| To hand key index values .....            | 67 |
| Manual Barcode Indexing .....             | 68 |
| To perform manual barcode indexing .....  | 68 |
| To remove a barcode region .....          | 68 |
| Manual OCR Indexing .....                 | 69 |
| To perform manual OCR indexing .....      | 69 |
| To remove an OCR region .....             | 69 |
| Merge Index Values .....                  | 70 |
| To merge index values .....               | 70 |
| Add Detail Sets .....                     | 71 |
| To add detail sets .....                  | 71 |
| About Detail Sets .....                   | 71 |
| Verify Index Values .....                 | 72 |
| To verify index values .....              | 72 |
| Save Index Values .....                   | 73 |
| To save index values .....                | 73 |
| EDI QC (Business Rule Verification) ..... | 74 |
| To perform EDI QC .....                   | 74 |

## CHAPTER 6 Manual Quality Control Step

|   |    |
|---|----|
| Manual Quality Control Step Overview .....              | 78 |
| QC Menu and Toolbar Commands .....                      | 79 |
| QC Auto Play .....                                      | 80 |
| To start QC Auto Play .....                             | 81 |
| Apply QC Tags .....                                     | 82 |
| To apply a QC batch tag .....                           | 82 |
| To apply a QC document tag .....                        | 82 |
| To apply a QC page tag .....                            | 83 |
| To apply a QC index tag .....                           | 83 |
| QC Tag Details Window .....                             | 84 |
| To open the QC Tag Details window .....                 | 84 |
| Browse QC Tags Window .....                             | 85 |
| To open the Browse QC Tag window .....                  | 85 |
| To locate QC tags using the Browse QC Tags window ..... | 85 |
| To remove QC tags using the Browse QC Tags window ..... | 85 |
| To add QC tags using the Browse QC Tags window .....    | 86 |
| To print rows from the Browse QC Tags window .....      | 86 |
| To export rows from the Browse QC Tags window .....     | 86 |

## CHAPTER 7 AP Processing Step

|  |    |
|--|----|
| AP Processing Step Overview .....        | 88 |
| Batch Invoices Pane .....                | 88 |
| Invoice Pane .....                       | 88 |
| Invoice Details Pane .....               | 89 |
| Invoice and PO Line Items .....          | 89 |
| To group line items .....                | 90 |
| To remove a line item from a group ..... | 90 |
| To delete a group .....                  | 91 |
| To reject a line item .....              | 91 |
| Invoice Status and History .....         | 91 |
| To approve an invoice .....              | 91 |

|  |    |
|--|----|
| To reject an invoice .....             | 92 |
| To reset an invoice .....              | 92 |
| To refresh the displayed invoice ..... | 92 |
| To view invoice history .....          | 92 |

## CHAPTER 8 Forms Designer Step

|   |     |
|---|-----|
| Forms Designer Step Overview .....                    | 94  |
| Forms Magic Designer Overview .....                   | 94  |
| Messages .....  | 95  |
| To send a message .....                               | 96  |
| Clicks .....  | 96  |
| Common Functions .....                                | 96  |
| Batch Options .....                                   | 97  |
| To submit a complete batch .....                      | 97  |
| To submit an incomplete batch .....                   | 97  |
| View Documents .....                                  | 98  |
| Single Document View .....                            | 98  |
| To insert and remove document breaks .....            | 98  |
| To access the Form Designer .....                     | 98  |
| To add a new form .....                               | 99  |
| To add a form page .....                              | 99  |
| To replace the setup image .....                      | 100 |
| To process a document or batch .....                  | 100 |
| To merge unclassified documents .....                 | 100 |
| To set user preferences .....                         | 100 |
| Cluster Documents .....                               | 101 |
| To cluster documents .....                            | 101 |
| To set user preferences .....                         | 101 |
| View Clusters .....                                   | 101 |
| To create a new form .....                            | 102 |
| To change the setup image for an existing form .....  | 103 |
| To open the Form Designer for an existing form .....  | 103 |
| Manage Forms .....                                    | 103 |
| Form Types .....                                      | 104 |
| To open the Form Types window .....                   | 104 |
| To sort form types .....                              | 104 |
| To create a new form type .....                       | 104 |
| To view forms within a form type .....                | 104 |
| To change the appearance of the form types list ..... | 105 |
| To rename a form type .....                           | 105 |
| To delete a form type .....                           | 105 |
| To add an index at the form-type level .....          | 105 |
| To remove an index at the form-type level .....       | 106 |
| To rename an index at the form-type level .....       | 106 |
| To add a detail field at the form-type level .....    | 106 |
| To remove a detail field at the form-type level ..... | 106 |
| To rename a detail field at the form-type level ..... | 107 |
| Forms .....   | 107 |
| To open the Forms window .....                        | 107 |
| To sort forms .....                                   | 108 |
| To open the Form Designer .....                       | 108 |
| To create a new form .....                            | 108 |
| To change the appearance of the forms list .....      | 108 |
| To rename a form .....                                | 108 |
| To delete a form .....                                | 109 |
| To change a form type .....                           | 109 |
| To specify document breaks .....                      | 109 |

|  |     |
|--|-----|
| To specify required words .....                            | 110 |
| To add an index at the form level .....                    | 110 |
| To add an index at the form-type level .....               | 110 |
| To remove an index .....                                   | 111 |
| To rename an index .....                                   | 111 |
| To add a detail field at the form level .....              | 111 |
| To add a detail field at the form-type level .....         | 111 |
| To remove a detail field .....                             | 112 |
| To rename a detail field .....                             | 112 |
| Form Designer Overview .....                               | 112 |
| To take control of a locked form .....                     | 113 |
| Configure Form Pages .....                                 | 113 |
| To remove a page .....                                     | 113 |
| To reorder a page .....                                    | 113 |
| Configure Indexes .....                                    | 113 |
| To configure an index .....                                | 114 |
| Configure Detail Fields .....                              | 115 |
| To configure a detail field .....                          | 115 |
| Configure Anchors .....                                    | 116 |
| To configure an anchor .....                               | 116 |
| Attach Anchors to Indexes .....                            | 117 |
| To attach an anchor to an index .....                      | 118 |
| Attach Anchors to Detail Fields .....                      | 119 |
| Zone Anchor .....  | 119 |
| To attach a zone anchor to detail fields .....             | 119 |
| Header and Footer Anchors .....                            | 120 |
| To attach header and footer anchors to detail fields ..... | 120 |
| Batch Processing .....                                     | 120 |
| To process a batch .....                                   | 121 |
| To clear all classifications .....                         | 121 |
| Color Dropout Filters .....                                | 121 |
| To create a color dropout filter .....                     | 121 |
| To edit a color dropout filter .....                       | 122 |
| To rename a color dropout filter .....                     | 122 |
| To delete a color dropout filter .....                     | 122 |
| User Preferences .....                                     | 122 |
| To set user preferences .....                              | 123 |

## CHAPTER 9 System Settings

|  |     |
|--|-----|
| System Preferences Overview .....                                    | 126 |
| To access system preferences .....                                   | 126 |
| Scanner Settings .....   | 126 |
| To specify scanner settings .....                                    | 127 |
| Indexing Preferences .....   | 128 |
| To specify navigation between documents and index fields .....       | 128 |
| To specify where the index verification process begins .....         | 128 |
| To reset all index preferences to their default values .....         | 128 |
| Display Preferences .....  | 129 |
| To specify settings for the single display view .....                | 129 |
| To specify settings for the multiple display view .....              | 129 |
| To specify whether images display as bitonal .....                   | 130 |
| To change the color of the document break indicator .....            | 130 |
| To reset all display preferences to their default values .....       | 130 |
| System Preferences .....   | 131 |
| To specify navigation options .....                                  | 131 |
| To specify navigation options when copying documents and pages ..... | 131 |
| To specify batch creation options .....                              | 131 |



|  |     |
|--|-----|
| To specify auto batch assignment options .....                           | 132 |
| To reset all system preferences to their default values .....            | 132 |
| Import Preferences .....   | 133 |
| To specify import preferences .....                                      | 133 |
| To reset all import preferences to their default values .....            | 133 |
| System Messages .....  | 133 |
| To view and sort system messages .....                                   | 133 |
| To specify the preference for a single system message .....              | 134 |
| To specify the preference for all system messages .....                  | 134 |
| To reset all message preferences to their default values .....           | 134 |
| Keyboard Shortcuts (Hot Keys) .....                                      | 135 |
| To view and sort keyboard shortcuts (hot keys) .....                     | 135 |
| To customize keyboard shortcuts (hot keys) .....                         | 135 |
| To reset all keyboard shortcuts (hot keys) to their default values ..... | 135 |
| Customize Toolbars .....   | 136 |
| To add an item to a toolbar .....  | 136 |
| To delete an item from a toolbar .....                                   | 137 |
| To change the display order of a toolbar item .....                      | 137 |
| To set display options for a toolbar command .....                       | 137 |
| To reset a toolbar to the default settings .....                         | 138 |
| To add a custom toolbar .....  | 138 |
| To delete a custom toolbar .....   | 139 |

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# CHAPTER 1

## Introduction

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|                                       |    |
|---------------------------------------|----|
| Welcome .....                         | 12 |
| System Requirements .....             | 12 |
| Terms You Should Know .....           | 13 |
| Get Product Support .....             | 16 |
| Log In to the Operator Console .....  | 17 |
| Log Out of the Operator Console ..... | 17 |
| Change Your Password .....            | 18 |



## Welcome

The PaperVision Capture Operator Console provides scanning, indexing, and batch processing capabilities. After you log in to the PaperVision Capture Operator Console, the main window appears where you can manually create batches, assume batch ownership, open batches, and submit batches. After you create a batch, you can scan or import images, index documents, and define user settings for the scan and batch display. You can also edit the contents of a batch before marking the batch as complete, and then submitting it for processing and transition to the next job step.

You must be assigned to specific job steps by your PaperVision Capture administrator to perform the functions associated with that job. If you are not able to perform a certain function, such as batch creation, contact your PaperVision Capture administrator.

## System Requirements

This content describes the minimum software and hardware requirements for PaperVision Capture.

### Minimum Software Requirements

The following table shows the minimum software requirements for PaperVision Capture and its optional components.

| Software                   | Version  |
|----------------------------|--|
| Operating Systems (Client) | Windows® 7, 8, 8.1, and 10<br>(32- and 64-bit operating systems are supported)   |
| Operating Systems (Server) | Windows® Server 2008 R2, 2012, and 2012 R2   |
| Microsoft® .NET Framework  | Version 4.0 or later (included on the installation media)  |
| Windows Installer          | Version 4.5 or later (included on the installation media)  |
| Microsoft® SQL Server      | SQL Server 2008 or later<br><b>NOTE:</b> Optionally, you can install Microsoft SQL Server 2008 R2 Express Edition (included on the installation media) |

### Minimum Hardware Requirements

Most enterprise software is capable of operating on a basic hardware configuration that includes a current processor and 4 GB of memory for desktops and 8 GB of memory for servers. However, each organization and their intended use of PaperVision Enterprise are unique. The intended workload, (including the maximum number of users, and the quantity and types of operations performed within a specific periodicity, etc.) coupled with security and redundancy requirements will dictate the hardware requirements for each implementation.

PaperVision Capture has the distinct capability to scale both up and out. You can configure most of the functions performed by PaperVision Capture to take advantage of powerful hardware configurations, such as those with many processor cores and hundreds of GB of memory (scaling up). Additionally, PaperVision Capture can spread its processing requirements across numerous computers (scaling out).

PaperVision Capture products are designed and tested for specific operating systems, not hardware environments. Numerous customers successfully run PaperVision Capture in virtual environments, including VMware® and Microsoft® Hyper-V. While this technology has matured over the years, issues have occurred with common software (other than PaperVision Capture) not operating properly or efficiently because of the virtual environment. In the cases that Digitech Systems' Technical Support has witnessed, the issue was with the virtual environment, not our software.

If our technical support believes that the hardware environment (including virtual environments) is contributing to an operational or performance issue, they may request that you ensure the issue exists in a different (or non-virtual) environment.

If you intend to use a virtual environment for your PaperVision Capture implementation, carefully consider the implications of running in a shared environment. Remember, you are not just sharing processors and memory. You are also sharing network and disk resources with the other virtual environments on the same hardware.

## Sharing a Database with PaperVision Enterprise

If you want to share a common database between PaperVision Capture and PaperVision Enterprise, PaperVision Enterprise R60 or later must be installed.

## Terms You Should Know

This section contains definitions for terms that are used throughout the documentation and online help. Knowing this terminology will help you use the product and its documentation more effectively.

### Batch

A batch is a collection of documents and their associated index name-value pairs and statistics that are moved as a logical unit of work through a job.

### Batch Priority

Batch priority establishes the order for the:

- Appearance of batches awaiting ownership in the PaperVision Capture Operator Console
- Processing of batches by the Automation Service

The following values are assigned by PaperVision Capture administrators to calculate the overall batch priority.

- Job age priority is a number associated with the job and is multiplied by the number of elapsed minutes since the batch was created.
- The job step's age priority is a value associated with the current job step and is multiplied by the number of elapsed minutes the batch has been waiting in the current step.

- The job step priority is a value associated with the current job step and assigned by a PaperVision Capture administrator.
- Administrative priority is a value associated with each specific batch. To have a significant impact on the overall calculation, PaperVision Capture administrators can assign a wide range of values (0-999,999) to this priority.

PaperVision Capture administrators assign numbers to indicate batch urgency and assist with scheduling and resource allocation. The system uses these numbers, which range from 0 (not urgent) to 100 (urgent), to schedule system resources and assign higher-priority batches to users. Batch priority helps PaperVision Capture administrators efficiently manage job loads and enables the system to automatically assign prioritized batches to operators in a round-robin fashion.

The overall batch priority is calculated as follows:

(Job age priority  $\times$  elapsed minutes since batch was created) + (step age priority  $\times$  elapsed minutes batch has been waiting in current step) + job step priority + administrative priority

## Detail Sets

Detail sets expand the capabilities of standard index fields because they define “many-to-one” relationships, which allow multiple sets of field data to reference a single document. In a many-to-one relationship, an index field contains a value that references another field or set of fields that contain unique values.

## Document

A document is the equivalent of a file folder within a filing cabinet. A document holds all of the pages for a given set of index values.

## Forms Magic Worker

The Forms Magic Worker is a required service that processes tasks within Forms Magic. Only one Forms Magic Worker can be installed per machine, but multiple workers can be installed system wide for scalability.

## Forms Magic Communication Server

The Forms Magic Communication Server manages communications between all clients and Forms Magic Workers. There can be only one Forms Magic Communication Server per system-wide installation.

## Forms Magic Project

A Forms Magic Project is a collection of form types, classification information, and extraction data. Form Magic requires at least one Forms Magic Project, but you can create as many as you need.

## Image

An image is a visual representation of a picture or graphic, such as an electronic file with the extension bmp, jpg, or tiff.

## Index

An index is a value that users apply to a document for reference and retrieval.

## Job

A job is a defined process comprised of one or more job steps through which batches are processed. At a minimum, each job must contain a start step. Each job is unique by name within an entity.

## Job Step

A job step is an automated or manual operation that is performed on a batch. Manual job steps are performed by assigned users through the PaperVision Capture Operator Console; automated job steps are completed by the PaperVision Capture Automation Service, and require no user intervention.

## Master Batch Repository

The Master Batch Repository is the centralized storage area where PaperVision Capture stores all captured images. When installing PaperVision Capture in an environment containing multiple PaperVision Capture Gateways or PaperVision Capture Automation Servers, this location should be a network accessible location (for example, `\\SERVER\SHARE`).

## Page

One or more images (files with extensions bmp, jpg, or tiff) comprise a single page within a document. For example, a page can include the originally captured image and a manipulated version of the image after noise removal.

## PaperVision Capture Administration Console

The PaperVision Capture Administration Console provides administration and job configuration capabilities.

## PaperVision Capture Automation Service

The PaperVision Capture Automation Service is a Microsoft® Windows service that performs automated tasks and batch processing at specified time intervals. Examples of work performed by the PaperVision Capture Automation Service include the compilation of statistics when an operator completes a batch and the processing of automated job steps. Multiple Automation Services can be installed on distinct machines or multiple PaperVision Capture Automation Service processes may be configured to run on the same machine.

## PaperVision Capture Data Transfer Agent Service

The PaperVision Capture Data Transfer Agent Service is a Microsoft® Windows service that moves batches in local temporary batch repositories to/from the Master Batch Repository.

# PaperVision Capture Gateway Server

The PaperVision Capture Gateway Server is an application server that enables communication between PaperVision Capture modules and provides access to databases and the Master Batch Repository in distributed deployment scenarios.

# PaperVision Capture Operator Console

The PaperVision Capture Operator Console provides scanning, indexing, and batch processing capabilities.

# Get Product Support

Digitech Systems takes great pride in providing software that is simple to use, feature-rich, and flexible in architecture and integration capabilities. If you experience any difficulty, please contact us toll free at (877) 374-3569 or direct at (402) 484-7777 to experience our legendary customer service. Additionally, you may contact us at [support@digitechsystems.com](mailto:support@digitechsystems.com). Our technical support staff is available to serve you between the hours of 8:00 AM and 6:00 PM Central Time.

In addition to our legendary technical support staff, we also offer the following resources to help you answer questions and resolve issues.

- **MyDSI** - MyDSI is an interactive tool for all Digitech Systems customers. Log in to MyDSI at <http://mydsi.digitechsystems.com> to download product updates, license purchased software, view support contract renewals, and check the status of your software support cases and requests. If you are a Digitech Systems reseller, there are sales and marketing tools available for you to download
- **User Forums** - Log in to the User Forums at <http://forums.digitechsystems.com> to exchange answers and ideas with other users in our moderated community.
- **Knowledge Base** - Log in to search our extensive Knowledge Base at <http://kb.digitechsystems.com> for articles on all Digitech Systems products.
- **Documentation** - For documentation describing the use and features of the PaperVision Capture Administration Console, refer to the *PaperVision Capture Administration Guide*. For documentation describing the use and features of the PaperVision Capture Operator Console, refer to the *PaperVision Capture User Guide*. To access the online help and manuals from the Administration and Operator Consoles, click the **Help** menu.

# Additional Contact Information

- **Enhancement Requests** - Digitech Systems' product features and enhancements are driven by you, our customer. If you have an idea for a future product feature or enhancement, please send an e-mail to [dev@digitechsystems.com](mailto:dev@digitechsystems.com).
- **Products and Services** - You can also contact our sales team at [sales@digitechsystems.com](mailto:sales@digitechsystems.com) to discuss our latest products and services with one of our dedicated Client Development Managers (CDMs).



# Log In to the Operator Console

When you log in to the PaperVision Capture Operator Console, the system authenticates your access based on the user name and password you provide. If your site uses multiple entities, you will also need to provide the correct entity ID.

Only one user can log on to a single installation of the PaperVision Capture Operator Console. However, if the PaperVision Capture administrator has configured your system to do so, multiple users who remotely log on to a terminal server can log on to a single installation of the PaperVision Capture Operator Console.



## NOTE

Before you can log on to the PaperVision Capture Operator Console, you must get your user name, password, and if required, entity ID from your PaperVision Capture administrator.

### To log in to the PaperVision Capture Operator Console

1. Double-click the **PaperVision Capture Operator Console** icon.
2. In the **Entity ID** box, type the identifier for the entity.
3. In the **User Name** box, type your user name.
4. In the **Password** box, type your password. Remember that passwords are case-sensitive.
5. If your PaperVision Capture administrator enabled Windows Authentication, you can select **Use Windows Authentication** so that you do not have to type your credentials each time you log on.
6. Click **OK**.

# Log Out of the Operator Console

If your system is set up so that only one user can log in at a time, you must log out before another user can log in. When you log out, if you have any unsaved changes, you are prompted to save those changes before you are logged out.

### To log out of the PaperVision Capture Operator Console

- On the main **PaperVision Capture** window, do one of the following:
  - On the **File** menu, click **Exit**.
  - On the toolbar, click **Exit**.

### To log out and then log in as another user

1. On the main **PaperVision Capture** window, on the lower-right corner of the status bar, click the down arrow next to **Connected as User Name**.
2. Click **Login as Another User**.
3. Click **Yes**.

The **Login** dialog box appears, and the status bar displays **Disconnected** to show that the previous user is no longer logged in.

4. Type your login credentials, and then click **OK**.

## Change Your Password

Your system administrator sets requirements for passwords such as their frequency of expiration, and their required length and complexity. If you have questions about your password requirements, check with your system administrator.



### NOTE

Passwords are case sensitive.

---

### To change your password

1. On the main **PaperVision Capture** window, click the **Tools** menu, and then click **Change Password**.
2. In the **Current Password** box, type the password you are currently using.
3. In the **New Password** box, type your new password.
4. In the **Confirm Password** box, type your new password again.
5. Click **OK**.

# CHAPTER 2

## Work with Batches

---

|                                 |    |
|---------------------------------|----|
| Batch Overview .....            | 20 |
| Batch Grids Summary .....       | 21 |
| Take Ownership of Batches ..... | 23 |
| Undo Batch Ownership .....      | 25 |
| Open Batches .....              | 26 |
| Submit Batches .....            | 26 |
| Specify Batch Options .....     | 27 |

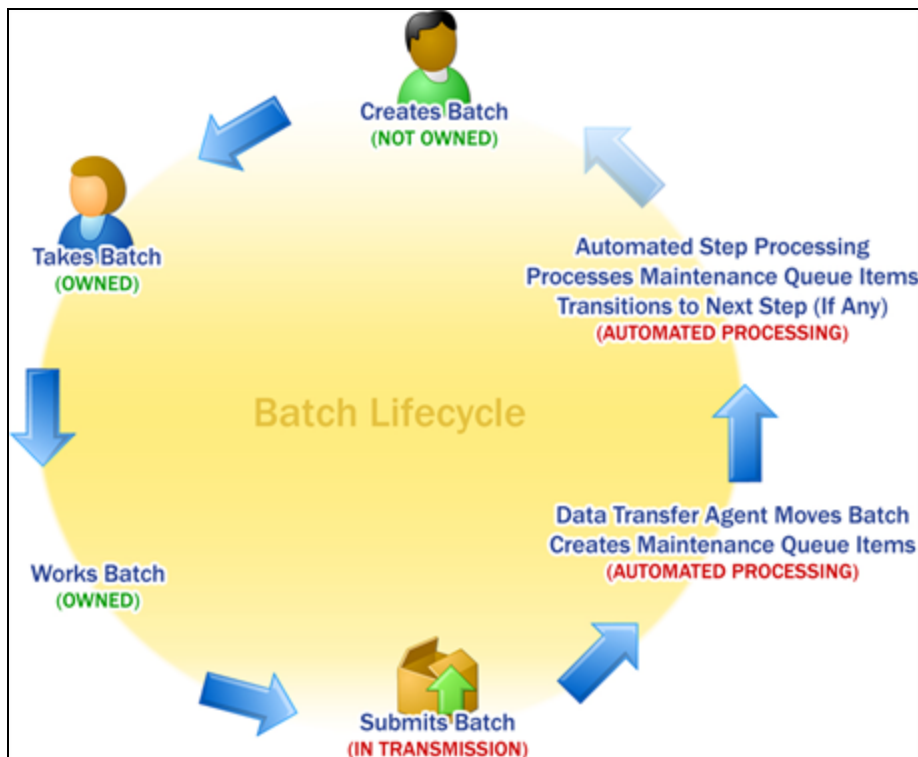


## Batch Overview

A batch is a collection of documents and their associated index name-value pairs and statistics that are moved as a logical unit of work through a job. A job is a defined process that has job steps through which batches are processed. The administrator assigns specific job steps to the operators who will perform specific functions in the PaperVision Capture Operator Console. From the PaperVision Capture Operator Console, you can scan, index, and process batches. If you are assigned to the Capture job step, you can configure batch creation settings, create new batches, assume batch ownership, open batches, and submit batches. You can also re-transmit batches if they encountered processing errors during submission. After a batch is created, it moves through the sequence of steps in the job assigned to the batch. Users can perform the following tasks:

- Scan or import images
- Index documents
- Define scan and batch display settings
- Edit the contents of a batch before marking it as complete
- Submit the batch for processing, which transitions the batch to the next job step

The diagram below illustrates the life cycle of a batch beginning with its creation, assumption of ownership, submission, and automated processing.



## Batch Grids Summary

After you log on to the PaperVision Capture Operator Console, The **PaperVision Capture** window appears where you can work with batches. This window contains the **Batches Waiting** grid and the **Batches Owned** grid to manage the flow of batches through a job.

To update the batches that appear on the batch grids

- On the toolbar, click **Refresh**.

## Batches Waiting Grid

The upper pane of the **PaperVision Capture** window displays the **Batches Waiting** grid. This grid shows batches that nobody owns, so they are not being processed. A batch cannot be processed until an operator takes ownership of it. (See "Take Ownership of Batches" on page 23 for more information.)

Batches Waiting

| Priority  | Batch Name   | Operator Provided Date | Batch Description | Job Step Name  | Job Step Type  | Job Name       | Batch Id  | Batch Created Date | # Docs    | # Pages   |
|-----------|--------------|------------------------|-------------------|----------------|----------------|----------------|-----------|--------------------|-----------|-----------|
| Filter... | Filter...    | Filter...              | Filter...         | Filter...      | Filter...      | Filter...      | Filter... | Filter...          | Filter... | Filter... |
| 0         |              | 2016-09-14 15...       |                   | Forms Designer | Forms Designer | Forms Designer | 3         | 2016-09-14 15...   | 1         | 9         |
| 0         | Test batch 6 | 2016-09-22 16:...      |                   | Forms Designer | Forms Designer | Forms Designer | 6         | 2016-09-22 16:...  | 1         | 23        |

This grid shows batches that are awaiting ownership. No operators are currently processing these batches.

Take Take / Open [Reset All Filters](#) [Reset Current Filter](#)



### NOTE

The values in the number of documents (**# Docs**) and pages (**# Pages**) columns are the totals from the most recent time the batch was submitted. These values do not reflect changes that occur while the batch is owned and being processed.

## Batches Owned Grid

The lower pane of the **PaperVision Capture** window displays the **Batches Owned** grid. This grid shows batches that you own and are available for you to open, process, and submit.



| Priority | Batch Name   | Operator Provided Date | Batch Description | Job Step Name  | Job Step Type  | Job Name       | Batch Id | Batch Created Date |
|----------|--------------|------------------------|-------------------|----------------|----------------|----------------|----------|--------------------|
| 0        | Batch 4      | 2016-09-14 17:07       |                   | Forms Designer | Forms Designer | Forms Designer | 4        | 2016-09-14 17:07   |
| 0        | Test batch 6 | 2016-09-22 16:45       |                   | Forms Designer | Forms Designer | Forms Designer | 6        | 2016-09-22 16:45   |

This grid shows batches that are owned and that you can open and process.

Open Submit Batch (Complete) Undo Take [Reset All Filters](#) [Reset Current Filter](#)

For information about the tasks you can perform from the **Batches Owned** grid, see "Open Batches" on page 26, "Submit Batches" on page 26, and "Undo Batch Ownership" on page 25 for step-by-step instructions.

## Customize Columns on the Batch Grids

You can specify which columns display on the **Batches Waiting** and **Batches Owned** grids.

### To customize columns on the batch grids

- On the main **PaperVision Capture** window, do one of the following:
  - On the **Tools** menu, click **Options**.
  - On the toolbar, click **Options**.
- In the **Batch Grids: Customize Columns** area, click either **Batches Waiting** or **Batches Owned**.
- In the **Select Columns** dialog box, select the check boxes for the columns that you want to appear on the grid. Clear the check boxes for the columns that you want to hide.
- To reorder the columns, select the column you want to move, and then click **Move Up** or **Move Down**.
- To restore the most recently saved order, click **Reset**.
- When you are finished making changes, click **OK**.
- If you want the settings you specified to apply to both grids, select **Apply To Both Grids**.
- Click **OK**.

## Filter Columns on the Batch Grids

You can filter the columns on the **Batches Waiting** and **Batches Owned** grids to display only the batches you specify.

### To filter columns on the batch grids

1. On the main **PaperVision Capture** window, click the filter on the column in the batch grid that you want to filter.
2. Do one of the following:
  - Type the criteria in the box you want to use to filter the batches.
  - Select the criteria you want to use to filter the batches from the list.
  - Type the date in the box, or pick the date from the calendar that you want to use to filter batches.
3. (Optional) To further filter the list, click the filter in another column and repeat step two.
4. (Optional) Click **Reset All Filters** to remove all your filter criteria.
5. (Optional) Click **Reset Current Filter** to remove the filter criteria in the current column.

## Take Ownership of Batches

The upper pane of the **PaperVision Capture** window displays the **Batches Waiting** grid. This grid contains a list of batches that are waiting to be processed and are available for you to own. You must take ownership of a batch before you can work on it. You can own multiple batches, but you can work on only one batch at a time.

### To take ownership of a batch

1. On the **Batches Waiting** grid, select the batch you want to own.
2. Click **Take**.

The batch you selected moves to the **Batches Owned** grid.

### To take ownership of and open a batch

1. On the **Batches Waiting** grid, select the batch you want to own.
2. Click **Take / Open**.

The batch opens in the applicable step window.

## Create Batches

To create a batch, you must be assigned to a Capture start step. Otherwise, you cannot create batches. If you try to create a batch for a job that was deleted, deactivated, or has a deleted start step, a message informs you about the state of the job, and you cannot create a new batch.



#### T I P

To automatically populate information from the previous batch, click the **Tools** menu, and then click **Options**. In the **Options** dialog box, select the **Populate new batch with previous batch information** check box.

---

### To create a new batch

1. On the main **PaperVision Capture** window, do one of the following:
  - On the **File** menu, click **New Batch**.
  - On the toolbar, click **New Batch**.
2. From the **Job** list, select the job you want to use to process the batch.
3. From the **Start Step** list, select the start step for the job.



#### NOTE

If you are unsure which job or start step to select, contact your PaperVision Capture administrator.

---

4. In the **Name** box, type the name of the batch.
5. In the **Date** box, type or select the date you want to set for the batch.
6. In the **Time** box, type or select the time you want to set for the batch.



#### NOTE

If you change the default value in the **Date** and/or **Time** boxes, your entry appears in the **Operator Provided Date** column on the **Batches Waiting** and **Batches Owned** grids.

---

7. In the **Description** box, type a description for the batch.

Your entry appears in the **Batch Description** column on the **Batches Waiting** and **Batches Owned** grids.
8. Click **OK**.



## Undo Batch Ownership

The batches you own appear on the **Batches Owned** grid. If you no longer want to own a batch, you can release it to the Batches Waiting grid. Any work you have performed on the batch will be removed.



### T I P

If you make mistakes while working on a batch and you want to discard all of your work, undo your batch ownership.

---

### To undo batch ownership

1. On the **Batches Owned** grid, select the batch you do not want to own.
2. Click **Undo Take**.
3. Click **OK**.

## Open Batches

Before you can open a batch, you must take ownership of it. (See "Take Ownership of Batches" on page 23 for more information.) The batches you can open appear on the **Batches Owned** grid. You can only open and work on one batch at a time.

### To open an owned batch

- On the **Batches Owned** grid, do one of the following:
  - Select the batch you want to open, and then click **Open**.
  - Double-click the batch you want to open

The batch opens in the applicable step window.

You can also automatically open a batch when you take ownership of it.

### To take ownership of and open a batch

1. On the **Batches Waiting** grid, select the batch you want to own.
2. Click **Take / Open**.

The batch opens in the applicable step window.

## Submit Batches

You can submit a batch as complete or incomplete. When you submit a complete batch, it is processed and transitioned to the next job stop.

### To submit a complete batch

1. On the **Batches Owned** grid, select the batch you want to submit as complete.
2. Click **Submit Batch Complete**.
3. Click **OK**.

When you submit an incomplete batch, the batch does not transition to the next job step, and it is moved to the **Batches Waiting** grid. This allows you or another user to take ownership and continue processing (for example, scanning, indexing, and so on) the batch at a later time.

### To submit an incomplete batch

1. On the **Batches Owned** grid, select the batch you want to submit as incomplete.
2. On the **Submit Batch (Complete)** button, click the drop-down arrow, and then click **Submit Batch (Incomplete)**.
3. Click **OK**.

If an error occurs during a submission, you can submit the batch again.

### To retransmit a batch

- On the main **PaperVision Capture** window, do one of the following:
  - On the **File** menu, click **Retransmit Batches**.
  - On the toolbar, click **Retransmit Batches**.

## Specify Batch Options

You can specify options for batch creation, assignment, population, and the frequency of when batches are refreshed. You can also specify the columns that appear on the **Batches Waiting** and **Batches Owned** grids. (See "Customize Columns on the Batch Grids" on page 22 for more information.)

### Batch Creation Options

Batch creation options let you specify how batches behave when they are created. These options apply only to newly-created batches and do not apply to all batches in the job step.

#### To specify batch creation options

1. On the main **PaperVision Capture** window, do one of the following:
  - On the **Tools** menu, click **Options**.
  - On the toolbar, click **Options**.
2. In the **Batch Creation** area, select one of the following options.
  - Select **Add to Batches Waiting** to cause batches to appear on the **Batches Waiting** grid upon creation.
  - Select **Take Ownership** to automatically assume ownership of batches as they are created and have them appear on the **Batches Owned** grid.
  - Select **Take Ownership and Open** to automatically assume ownership of batches as they are created, have them appear on the **Batches Owned** grid, and then open them.
3. Click **OK**.

### Auto Batch Assignment Options

Auto batch assignment options let you specify what happens after you submit a batch.

#### To specify auto batch assignment options

1. On the main **PaperVision Capture** window, do one of the following:
  - On the **Tools** menu, click **Options**.
  - On the toolbar, click **Options**.
2. In the **Auto Batch Assignment** area, select one of the following options.
  - Select **None** to return to the **PaperVision Capture** window after you submit a batch. This is the default option.
  - Select **Next Highest Priority** to go to the batch with the next highest priority. If no batches are found, you return to the **PaperVision Capture** window.
  - Select **Next Batch in Current Job Step** to go to the next batch in the current job step (that is, the job step you most recently worked on). For example, if you are indexing a batch and click **Submit**, then you are taken to the next batch ready for indexing. This option does not use batch priority in its assignment. If no batches are found, you return to the **PaperVision Capture** window.
3. Click **OK**.

## Batch Population and Refresh Options

Batch population and refresh options let you specify whether new batches are populated with information from the previous batch and if the batch grids are refreshed automatically.

### To specify batch population and refresh options

1. On the main **PaperVision Capture** window, do one of the following:
  - On the **Tools** menu, click **Options**.
  - On the toolbar, click **Options**.
2. If you want to automatically populate the boxes on the **New Batch** dialog box with the information from the last batch created, in the **Batches** area, select the **Populate new batch with previous batch information** check box.
3. If you want the **Batches Waiting** and **Batches Owned** grids to automatically update, in the **Batches** area, select the **Auto Refresh** check box.
  - In the **Interval (sec)** box, type the number of seconds between the refresh process.  
The default refresh interval is 15 seconds, but you can assign a greater value. The assigned value must be equal to or greater than 15 seconds.
4. Click **OK**.

# CHAPTER 3

## Standard Options for Job Steps

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|                                 |    |
|---------------------------------|----|
| Standard Options Overview ..... | 30 |
| Page and Image Options .....    | 34 |
| Document Options .....          | 42 |
| Batch Options .....             | 48 |
| View Options .....              | 52 |
| Custom Code .....               | 59 |



## Standard Options Overview

A standard set of functionality is available from most job steps. For example, from any job step you can submit complete and incomplete batches, navigate through documents and pages, and customize how pages and documents appear in your workspace. If your PaperVision Capture administrator has provided a custom code operation that you can run, you can run it from most job steps.





## Standard Toolbar and Menu Commands










The commands for functions that are available from most job steps appear on the **Standard** toolbar. You can also locate these standard commands on the menus.











### TIP







You can access many standard commands by right-clicking on the main window of any job step.




| Toolbar Button and Command Name   | Function   | Menu        | Keyboard Shortcut |
|---|--|-------------|-------------------|
| <br><b>Delete Page</b>  | Opens the <b>Delete Pages</b> dialog box where you can specify to delete the selected page, or a range of pages within the current document or across documents. (See "Delete Pages" on page 38 for more information.)           | <b>Edit</b> | Delete            |
| <br><b>Copy Pages</b>  | Opens the <b>Copy Pages</b> dialog box where you can specify to copy the selected page, or a range of pages within the current document or across documents. (See "Cut, Copy, and Paste Pages" on page 36 for more information.) | <b>Edit</b> | Ctrl+C            |
| <br><b>Cut Pages</b>   | Opens the <b>Cut Pages</b> dialog box where you can specify to cut the selected page, or a range of pages within the current document or across documents. (See "Cut, Copy, and Paste Pages" on page 36 for more information.)   | <b>Edit</b> | Ctrl+X            |
| <br><b>Paste Pages</b> | Opens the <b>Paste Pages</b> dialog box where you can specify where to paste the copied or cut page(s) into the destination location. (See "Cut, Copy, and Paste Pages" on page 36 for more information.)                        | <b>Edit</b> | Ctrl+V            |

| Toolbar Button and Command Name  | Function  | Menu                          | Keyboard Shortcut |
|--|---|-------------------------------|-------------------|
| <br><b>Re-Save Page</b>                 | Re-saves the page after you manipulate it, for example, change its rotation or page polarity. (See "Re-Save Pages" on page 40 for more information.)  | <b>Edit</b>                   | V                 |
| <br><b>Add Document</b>                 | Appends a new document to the end of the batch. (See "Add Documents" on page 44 for more information.)  | <b>Edit</b>                   | Ctrl+Shift+A      |
| <br><b>Delete Document</b>              | Deletes the current document and all of its associated pages. (See "Delete Documents" on page 44 for more information.)   | <b>Edit</b>                   | Ctrl+Delete       |
| <br><b>Print Document</b>               | Prints a specified page range within the current document. (See "Print Pages" on page 35 for more information.)   | <b>File</b>                   | P                 |
| <br><b>Single Display</b>               | Displays one page at a time in the main window. (See "Single Display View" on page 55 for more information.)  | <b>View &gt; Organization</b> | none              |
| <br><b>Multiple Display</b>           | Displays a specified number of rows and columns (of pages) at a time in the main window. (See "Multiple Display View" on page 56 for more information.)   | <b>View &gt; Organization</b> | none              |
| <br><b>Reset Image</b>                | Resets the page to the original view or returns to the last saved view of the image if you have rotated, zoomed in or out, or manipulated the page. (See "Reset Images" on page 42 for more information.) | <b>View</b>                   | Ctrl+T            |
| <br><b>Invert Page Polarity</b>       | Reverses black text on a white background to white text on a black background or vice versa in single-display view. (See "Invert Polarity" on page 39 for more information.)                              | <b>View</b>                   | none              |
| <br><b>Invert Save Pages Polarity</b> | Reverses black text on a white background to white text on a black background or vice versa, and then saves the images. (See "Invert Polarity" on page 39 for more information.)                          | <b>View</b>                   | none              |

| Toolbar Button and Command Name   | Function  | Menu                   | Keyboard Shortcut |
|---|---|------------------------|-------------------|
| <br><b>Rotate 90°</b>              | Rotates the image 90 degrees clockwise. (See "Rotate Images" on page 41 for more information.)  | <b>View</b>            | R                 |
| <br><b>Rotate Save Images</b>      | Opens the <b>Rotate Save Images</b> dialog box where you can specify to rotate selected pages 90, 180, or 270 degrees within the current document or across documents, and then save the images. (See "Rotate Images" on page 41 for more information.)                 | <b>Edit</b>            | none              |
| <br><b>Scale to Window</b>         | Determines the best method (scale to width or height) to fit the image within the window. (See "Scale Options" on page 53 for more information.)  | <b>View &gt; Scale</b> | Ctrl+W            |
| <br><b>Scale to Width</b>          | Scales the image to the width of the screen. (See "Scale Options" on page 53 for more information.)   | <b>View &gt; Scale</b> | W                 |
| <br><b>Scale to Height</b>       | Scales the image to the height of the screen. (See "Scale Options" on page 53 for more information.)  | <b>View &gt; Scale</b> | H                 |
| <br><b>Zoom In</b>               | Increases the size of the image each time you click the command.<br><br>You can also zoom in on a specific area by clicking the left mouse button and dragging the pointer around the region you want to magnify. (See "Zoom Options" on page 54 for more information.) | none                   | Ctrl+Plus Sign    |
| <br><b>Zoom Out</b>              | Decreases the size of the image each time you click the command. (See "Zoom Options" on page 54 for more information.)  | none                   | Ctrl+Minus Sign   |
| <br><b>Insert Document Break</b> | Marks an existing page as the first page of the next document. (See "Insert Document Breaks" on page 45 for more information.)  | <b>Edit</b>            | Ctrl+Insert       |



| Toolbar Button and Command Name  | Function   | Menu                          | Keyboard Shortcut |
|--|--|-------------------------------|-------------------|
| <br><b>Remove Document Break</b>        | Removes a document break and merges the current document with the previous document. (See "Remove Document Breaks" on page 46 for more information.)   | <b>Edit</b>                   | Ctrl+R            |
| <br><b>Submit Batch (Complete)</b>      | Submits the batch to the server for transition to the next job step. (See "Submit a Complete Batch" on page 48 for more information.)  | <b>File &gt; Submit Batch</b> | Shift+S           |
| <br><b>Submit Batch (Incomplete)</b>    | Submits the batch as incomplete which allows you or another operator to assume ownership and continue processing the batch at a later time. The batch does not transition to the next job step and is placed on the <b>Batches Waiting</b> grid. (See "Submit an Incomplete Batch" on page 48 for more information.)                                     | <b>File &gt; Submit Batch</b> | Shift+I           |
| <br><b>Submit And Create New Batch</b> | Creates a new batch immediately after submitting a batch. (See "Submit a Batch and Create a New One" on page 49 for more information.)   | <b>File</b>                   | Shift+C           |
| <br><b>Options</b>                    | Opens a dialog box where you can set options applicable to the current job step. You can set preferences that apply to indexing, document display, batches, and importing. You can also turn system messages off and on, and customize keyboard shortcuts (hot keys) and toolbars. (See "System Preferences Overview" on page 126 for more information.) | <b>Tools</b>                  | none              |
| <br><b>Execute Custom Code</b>        | Executes a custom code operation defined by your PaperVision Capture administrator. (See "Custom Code" on page 59 for more information.)   | <b>Edit</b>                   | none              |

| Toolbar Button and Command Name  | Function   | Menu        | Keyboard Shortcut |
|--|--|-------------|-------------------|
| <br><b>Merge Index Values</b>   | Combines your indexing entries with entries found in the database assigned by the PaperVision Capture administrator. (See "Merge Index Values" on page 70 for more information.) | <b>Edit</b> | F5                |
| <br><b>Manual Barcode Index</b> | Reads barcode data from your defined zone and then populates the selected index field. (See "Manual Barcode Indexing" on page 68 for more information.)                          | <b>Edit</b> | Ctrl+Shift+B      |
| <br><b>Manual OCR Index</b>     | Reads OCR data from your defined zone and then populates the selected index field. (See "Manual OCR Indexing" on page 69 for more information.)                                  | <b>Edit</b> | Ctrl+Shift+O      |

## Page and Image Options

After you open a batch, there are many options available for working with the pages in the batch. Although some commands refer to pages and others to images, all of them apply to the “page” that you see displayed. The options described in this section are available from most job steps. See the following sections for instructions to perform the referenced tasks.






- See "Navigate Pages" on the facing page for information about page navigation commands.
- See "Print Pages" on the facing page for information about printing options.
- See "Cut, Copy, and Paste Pages" on page 36 for instructions to use these editing commands.
- See "Extract and Copy a Page Region" on page 37 for instructions to use these editing commands.
- See "Delete Pages" on page 38 for information about options for deleting pages.
- See "Invert Polarity" on page 39 for information about using this command.
- See "Re-Save Pages" on page 40 for information about saving the appearance of pages.
- See "Import Images" on page 40 for information about options available for importing images.
- See "Rotate Images" on page 41 for information about options available for rotating images.
- See "Reset Images" on page 42 for instructions to use this command.
- See "Image Information" on page 42 for instructions to access the data the system records for each image.

## Navigate Pages

Page navigation commands help you easily move through documents. In addition to menu commands and toolbar buttons, you can use keyboard shortcuts for page navigation.

### To access page navigation commands

- From the job step window, do one of the following:
  - Click the **View** menu, and then point to **Page**.
  - To access page navigation commands on the toolbar, click the **View** menu, point to **Toolbars**, and then select **Batch Navigation**.
  - On the main window, right-click, and then point to **Page**.

| Toolbar Button and Command Name  | Function   | Keyboard Shortcut |
|--|--|-------------------|
| <br><b>First Page</b>     | Goes to the first page of the document you are in.   | Home              |
| <br><b>Previous Page</b>  | Goes to the page located before the page you are on.   | Page Up           |
| <br><b>Next Page</b>     | Goes to the page located after the page you are on.  | Page Down         |
| <br><b>Last Page</b>    | Goes to the last page of the document you are in.  | End               |
| <br><b>Jump to Page</b> | Opens the <b>Jump to Page</b> dialog box where you can enter the page number, and then go to it. | J                 |

## Print Pages

After you have opened a job step, you can print pages.

### To print pages in the current document

1. Do one of the following:
  - On the **File** menu, click **Print**.
  - On the toolbar, click **Print Document**.
2. In the **Print** dialog box, specify the printing options, and then click **OK**.


## Cut, Copy, and Paste Pages

You can cut, copy, and paste pages on the:

- Single display view (To open this view, click the **View** menu, point to **Organization**, and then select **Single Display**.)
- Multiple display view (To open this view, click the **View** menu, point to **Organization**, and then select **Multiple Display**.)
- **Thumbnails** window (available only in single display view) ( To open the **Thumbnails** window, click the **View** menu, point to **Windows**, and then select **Thumbnails**.)



You can perform the cut, copy, and paste tasks on consecutive or non-consecutive pages in one document or across multiple documents.

### To cut and paste pages


1. On the job step window, go to the page (or, select the page(s) on the multiple display view or **Thumbnails** window) that you want to cut.
2. Do one of the following:
  - On the **Edit** menu, click **Cut Pages**.
  - On the toolbar, click **Cut Pages** .
  - On the current or selected page, right-click, and then click **Cut Pages**.

In the **Cut Pages** dialog box, if you selected pages within the same document, the **Selected Pages (current document)** option is selected, and the selected page(s) appear in the **Pages** box. If necessary you can edit the pages. To specify a certain page, page range, or combination thereof, type the page numbers in the **Pages** box. For example, you can enter **1, 3-10**.

If you selected pages across multiple documents, **Selected Pages (across documents)** is selected.



3. In the **Cut Pages** dialog box, verify that the settings are correct, and then click **OK**.  
On the **Thumbnails** window or multiple display view, the selected pages appear with the cut icon  on the upper-right corner.
4. Go to the page in the document where you want to paste the pages.
5. Do one of the following:
  - On the **Edit** menu, click **Paste Pages**.
  - On the toolbar, click **Paste Pages** .
  - On the page where you want to paste the cut pages, right-click, and then click **Paste Pages**.
6. In the **Paste Pages** dialog box, verify that the selected document and page number are correct. If they are not, change them.
7. By default, the pages are pasted directly before your selected location. If you want them instead pasted after your selected location, select the **Paste after destination page** check box.
8. Click **OK**.

### To copy and paste pages

1. On the job step window, go to the page (or, select the page(s) on the multiple display view or **Thumbnails** window) that you want to copy.
2. Do one of the following:
  - On the **Edit** menu, click **Copy Pages**.
  - On the toolbar, click **Copy Pages** .
  - On the current or selected page, right-click, and then click **Copy Pages**.

In the **Copy Pages** dialog box, if you selected pages within the same document, the **Selected Pages (current document)** option is selected, and the selected page(s) appear in the **Pages** box. If necessary you can edit the pages. To specify a certain page, page range, or combination thereof, type the page numbers in the **Pages** box. For example, you can enter **1, 3-10**.

If you selected pages across multiple documents, **Selected Pages (across documents)** is selected.

3. In the **Copy Pages** dialog box, verify that the settings are correct, and then click **OK**.  
On the **Thumbnails** window or multiple display view, the selected pages appear with the copy icon  on the upper-right corner.
4. Go to the page in the document where you want to paste the pages.
5. Do one of the following:
  - On the **Edit** menu, click **Paste Pages**.
  - On the toolbar, click **Paste Pages** .
  - On the page where you want to paste the copied pages, right-click, and then click **Paste Pages**.
6. In the **Paste Pages** dialog box, verify that the selected document and page number are correct. If they are not, change them.
7. By default, the pages are pasted directly before your selected location. If you want them instead pasted after your selected location, select the **Paste after destination page** check box.
8. Click **OK**.

### Extract and Copy a Page Region

The **Extract and Copy Region** command copies a region of a page you select and then places it on a new page.

#### To extract and copy a page region

1. On the job step window, go to the page where you want to extract and copy a region.
2. Place the pointer on a corner of the region you want to extract.

## CHAPTER 3 Standard Options for Job Steps

3. Hold down Shift while clicking the left mouse button, and then drag the pointer around the region you want to capture.

The screenshot shows an invoice form for ACME Software. The form includes a header with the company logo and name, address, and phone number. Below this is a section for the customer, which is highlighted in yellow. A callout box points to the yellow highlight with the text: "A yellow boundary appears around the region you captured." The form also includes fields for the date, order number, and a table with columns for quantity and description.

| Qty | Description      |
|-----|------------------|
| 200 | Fashion Software |

4. On the **Edit** menu, click **Extract and Copy Region**.
5. In the confirmation message, click **Yes** to create a new page with the extracted region.

The new page appears after the current page.

### To remove a region

- Select the region, hold down Shift, and then press Delete.


## Delete Pages

You can delete pages on the:

- Single display view (To open this view, click the **View** menu, point to **Organization**, and then select **Single Display**.)
- Multiple display view (To open this view, click the **View** menu, point to **Organization**, and then select **Multiple Display**.)
- **Thumbnails** window (available only in single display view) ( To open the **Thumbnails** window, click the **View** menu, point to **Windows**, and then select **Thumbnails**.)

You can delete consecutive or non-consecutive pages in one document or across multiple documents.

### To delete pages

1. On the job step window, go to the page (or, select the page(s) on the multiple display view or **Thumbnails** window) that you want to delete.
2. Do one of the following:
  - On the **Edit** menu, click **Delete Pages**.
  - On the toolbar, click **Delete Page** .
  - On the current or selected page, right-click, and then click **Delete Pages**.

In the **Delete Pages** dialog box, if you selected pages within the same document, the **Selected Pages (current document)** option is selected, and the selected page(s) appear in the **Pages** box. If necessary you can edit the pages. To specify a certain page, page range, or combination thereof, type the page numbers in the **Pages** box. For example, you can enter **1, 3-10**.

If you selected pages across multiple documents, **Selected Pages (across documents)** is selected.

3. In the **Delete Pages** dialog box, verify that the settings are correct, and then click **OK**.

## Invert Polarity

Inverting the page polarity reverses the black text on white background to white text on black background (or vice versa). You can invert page polarity on the:

- Single display view (To open this view, click the **View** menu, point to **Organization**, and then select **Single Display**.)
- Multiple display view (To open this view, click the **View** menu, point to **Organization**, and then select **Multiple Display**.)
- **Thumbnails** window (available only in single display view) ( To open the **Thumbnails** window, click the **View** menu, point to **Windows**, and then select **Thumbnails**.)

You can invert page polarity on consecutive or non-consecutive pages in one document or across multiple documents. The **Invert Page Polarity** command is available only in single-display view, and applies the changes only to the current page.




### NOTE

If you apply page polarity in single-display view, the change does not persist unless you save it. If you do not save the change, the page reverts to its original appearance when you go to another page.

If you want to invert the page polarity on multiple pages simultaneously, you must use the **Invert Save Pages Polarity** command that saves the inverted pages prior to batch submission.

### To invert and save page polarity on pages

1. On the job step window, go to the page (or, select the page(s) on the multiple display view or **Thumbnails** window) on which you want to invert the polarity.
2. Do one of the following:
  - On the **Edit** menu, click **Invert Save Pages Polarity**.
  - On the toolbar, click **Invert Save Pages Polarity** .
  - On the current or selected page, right-click, and then click **Invert Save Pages Polarity**.

In the **Invert Save Pages Polarity** dialog box, if you selected pages within the same document, the **Selected Pages (current document)** option is selected, and the selected page(s) appear in the **Pages** box. If necessary you can edit the pages. To specify a certain page, page range, or combination thereof, type the page numbers in the **Pages** box. For example, you can enter **1, 3-10**.

If you selected pages across multiple documents, **Selected Pages (across documents)** is selected.

3. In the **Invert Save Pages Polarity** dialog box, verify that the settings are correct, and then click **OK**.

### Re-Save Pages

If you rotate a page or invert its polarity, the **Re-Save Page** command lets you save its new appearance. (See "Rotate Images" on the facing page and "Invert Polarity" on the previous page for instructions to perform these operations.)




#### NOTE

Page rotation and page polarity changes do not persist unless you save them. If you do not save the changes, the page reverts to its original appearance when you go to another page.

---

#### To re-save pages

1. On the job step window, on the page where rotation and/or polarity changes are applied do one of the following:
  - On the **Edit** menu, click **Re-Save Page**.
  - On the toolbar, click **Re-Save Page** .
2. In the confirmation message, click **Yes**.

### Import Images

After you have opened a job step, you can import images. The **Import Images** command inserts images before or after the selected page in the current document. This command does not perform barcode recognition, apply page rotation, or insert auto document breaks.



#### NOTE

To use the **Import Images** command, you PaperVision Capture administrator must give you access to it.

---

#### To import images

1. On the job step window, go to the page where you want to place the imported image(s).
2. On the **File** menu, click **Import Images**.
3. In the **Select Images to Import** dialog box, locate, and then select the image(s) to import.
4. Click **Open**.
5. From the **Document** list, select the document in which the image(s) will be inserted.
6. From the **Page** list, select the page number before which the image(s) will be inserted.
7. To insert the image(s) after the page you specified, select **Import pages after destination page**. Otherwise, images are inserted before the specified page.
8. Click **OK**.



## Rotate Images

You can rotate images 90, 180, or 270 degrees clockwise. You can rotate images on the:

- Single display view (To open this view, click the **View** menu, point to **Organization**, and then select **Single Display**.)
- Multiple display view (To open this view, click the **View** menu, point to **Organization**, and then select **Multiple Display**.)
- **Thumbnails** window (available only in single display view) ( To open the **Thumbnails** window, click the **View** menu, point to **Windows**, and then select **Thumbnails**.)

You apply rotation on consecutive or non-consecutive pages in one document or across multiple documents.




### NOTE

If you rotate an image using the **Rotate 90°** command, the change does not persist unless you save it. If you do not save the change, the page reverts to its original appearance when you go to another page.

If you want to rotate an image and save it, or rotate and save multiple images simultaneously, you must use the **Rotate Save Images** command as described in the following procedure.

### To rotate and save images

1. On the job step window, go to the page (or, select the page(s) on the multiple display view or **Thumbnails** window) that you want to rotate.
2. Do one of the following:
  - On the **Edit** menu, click **Rotate Save Images**.
  - On the toolbar, click **Rotate Save Images** .
  - On the current or selected page, right-click, and then click **Rotate Save Images**.

In the **Rotate Save Images** dialog box, if you selected pages within the same document, the **Selected Pages (current document)** option is selected, and the selected page(s) appear in the **Pages** box. If necessary you can edit the pages. To specify a certain page, page range, or combination thereof, type the page numbers in the **Pages** box. For example, you can enter **1, 3-10**.

If you selected pages across multiple documents, **Selected Pages (across documents)** is selected.

3. In the **Rotation Mode** list, select the number of degrees clockwise that you want to rotate the page(s).
4. In the **Rotate Save Images** dialog box, verify that the settings are correct, and then click **OK**.

### Reset Images


The **Reset Image** command restores an image to its original state from the last time it was saved, scales the image to the window to display it, and remove any applied zoom settings. As long as the image has not been saved, resetting the image removes the applied polarity, rotation, and regions that have been drawn.



#### NOTE

The **Reset Image** command is available only on the single display view. (To open this view, click the **View** menu, point to **Organization**, and then select **Single Display**.)

#### To reset an image

- On the job step window, on the image you want to reset, do one of the following:
  - On the **View** menu, click **Reset Image**.
  - On the toolbar, click **Reset Image** .
  - On the current page, right-click, and then click **Reset Image**.

### Image Information

For each image, you can view the following information:

- Displayed Image
- Dimensions
- Size
- Current Document Name
- Document Creation Date

#### To view image information

1. Open a batch.
2. On the job step window, click the **Tools** menu, and then click **Image Information**.

### Document Options

After you open a batch, there are many options available for working with the documents in the batch. The options described in this section are available from most job steps. See the following sections for instructions to perform the referenced tasks.

- See "Navigate Documents" on the facing page for information about accessing and using document navigation commands.
- See "Print Pages" on page 35 for information about printing pages within documents.
- See "Add Documents" on page 44 for information about adding documents to a batch.
- See "Copy Documents" on page 44 for instructions to copy documents.
- See "Delete Documents" on page 44 for information about deletion options.
- See "Insert Document Breaks" on page 45 for instructions to insert a document break.
- See "Remove Document Breaks" on page 46 for instructions to remove a document break.

- See "Shuffle Documents to Duplex" on page 46 for instructions to create a duplex document.
- See "Merge Like Documents" on page 47 for instructions to merge documents with the same index values.
- See "Document History" on page 47 for information about accessing a record of all actions performed on a document.

## Navigate Documents

Document navigation commands help you easily move through batches. In addition to menu commands and toolbar buttons, you can use keyboard shortcuts for document navigation.








### NOTE

If the batch does not contain multiple documents, the document navigation commands are unavailable.

### To access document navigation commands

- From the job step window, do one of the following:
  - Click the **View** menu, and then point to **Document**.
  - To access document navigation commands on the toolbar, click the **View** menu, point to **Toolbars**, and then select **Batch Navigation**.
  - On the main window, right-click, and then point to **Document**.

| Toolbar Button and Command Name   | Function   | Keyboard Shortcut |
|---|--|-------------------|
| <br><b>First Document</b>    | Goes to the first page of the first document in the batch.   | Ctrl+Home         |
| <br><b>Previous Document</b> | Goes to the first page of the document located before the document you are in.                           | Ctrl+Page Up      |
| <br><b>Next Document</b>     | Goes to the first page of the document located after the document you are in.                            | Ctrl+Page Down    |
| <br><b>Last Document</b>     | Goes to the first page of the last document in the batch.  | Ctrl+End          |
| <br><b>Jump to Document</b>  | Opens the <b>Jump to Document</b> dialog box where you can enter the document number, and then go to it. | Ctrl+J            |

## Add Documents

The **Add Document** command appends a blank document to the end of the batch. You can subsequently scan and import images into the new document, and then enter index values (if you are assigned this task). If you are tasked only with hand-key indexing, you can enter index values for the new document.



### NOTE

The **Add Document** command ignores the **Max Number Documents Per Batch** setting configured for the job, and adds new documents to the end of the batch.

### To add a document

- On the job step window, do one of the following:
  - On the **Edit** menu, click **Add Document**.
  - On the toolbar, click **Add Document**

The blank document appears at the end of the batch. You can then import or scan images into the new document (and enter index values if assigned to do so).

## Copy Documents

The **Copy Document** command copies all pages of the document, and then inserts the new document after the one you have selected.

### To copy a document

1. On the job step window, open the document you want to copy.
2. Do one of the following:
  - On the **Edit** menu, click **Copy Document**.
  - On the main window, right-click, and then click **Copy Document**.

## Delete Documents

The **Delete Document** command deletes the current document and its associated images.

### To delete a document

1. On the job step window, open the document you want to delete.
2. Do one of the following:
  - On the **Edit** menu, click **Delete Document**.
  - On the toolbar, click **Delete Document**
  - On the main window, right-click, and then click **Delete Document**.
3. Click **Yes** to confirm the deletion.

If the **Browse Batch** window is open, you can delete documents from the list. To open the **Browse Batch** window, click the **View** menu, point to **Windows**, and then select **Browse Batch**. (See "Browse Batch Window" on page 50 for information about all the tasks you can perform on the **Browse Batch** window.)

### To delete documents from the Browse Batch window


1. On the **Browse Batch** window, select the document(s) you want to delete.
2. On a selected document, right-click, and then click **Delete Documents**.
3. Click **Yes** to confirm the deletion.

## Insert Document Breaks


The **Insert Document Break** command lets you select an existing page as the first page of the next document. If you are in an indexing step, you can specify whether you want to save index values prior to inserting the document break.



#### T I P

It is easier to work with document breaks in the multiple display view where document breaks are indicated by a vertical, dotted line that appears between pages. (To switch to multiple display, on the toolbar click **Multiple Display** .)

### To insert a document break


1. On the job step window, go to the page where you want to place the document break.
2. Do one of the following:
  - On the **Edit** menu, click **Insert Document Break**.
  - On the toolbar, click **Insert Document Break** .
  - On the main window, right-click, and then click **Insert Document Break**.
3. Do one of the following:
  - If you are not in an indexing step, go to step 3.
  - If you are in an indexing step, do one of the following:
    - Click **Yes** to save the index values and insert a document break.
    - Click **No** to discard the index values and insert a document break.
4. Click **Yes** to insert the document break and make the current page the first page of the new document.

## Remove Document Breaks

When you remove a document break, the pages from the selected document are placed at the end of the previous document.




### T I P

It is easier to work with document breaks in the multiple display view where document breaks are indicated by a vertical, dotted line that appears between pages. (To switch to multiple display, on the toolbar click **Multiple Display** .)

---

### To remove a document break

1. On the job step window, go to the page where the document break was placed.
2. Do one of the following:
  - On the **Edit** menu, click **Remove Document Break**.
  - On the toolbar, click **Remove Document Break** .
  - On the main window, right-click, and then click **Remove Document Break**.



### N O T E

You cannot remove a document break for the first document in the batch.

---

3. Click **Yes** to remove the document break and merge the current document with the previous one.

## Shuffle Documents to Duplex

The **Shuffle Document to Duplex** command shuffles the first half of the pages, and they become the odd pages. The remaining pages becomes the even pages, and these pages are placed in reverse order.



### N O T E

To use the **Shuffle Document to Duplex** command, the document must contain an even number of pages.

---



### C A U T I O N

The **Shuffle Document to Duplex** command is irreversible.

---

### To shuffle a document to duplex

1. On the job step window, go to the document you want to shuffle to duplex.
2. On the **Edit** menu, click **Shuffle Document to Duplex**.
3. Click **Yes** to confirm the operation.

## Merge Like Documents

The **Merge Like Documents** command lets you merge documents that contain the same index values. For documents to be merged, they must contain matching index values. For example, in a batch containing three documents, one document contains a blank index value, and the other two documents have a matching index value of 80111. Only the two documents with the 80111 index values will be merged.

### To merge like documents

1. On the appropriate job step window, enter the required index value(s) for all documents.
2. On the **Edit** menu, click **Merge Like Documents**.

If the **Browse Batch** window is displayed, you can see that documents with matching index values are combined into one document.

If you are merging a large volume of documents, prior to the document merge, a progress message appears during document analysis. During analysis, you can click **Cancel** to stop the merge process and return to the job step screen.



#### N O T E

Depending on the number of documents in the batch, document analysis may take a few minutes to complete.

---

3. Click **OK** on the confirmation message.

### To undo a document merge

1. Before submitting the batch, exit the job step.
2. On the **Batches Owned** grid, select the batch that contains the merged documents.
3. Click **Undo Take**, and then click **OK**.

The batch is moved to the **Batches Waiting** grid, and the documents in the batch are no longer merged.

## Document History

For each document, you can view all of the actions performed on the document, such as when the document was created, image deletions and additions, and index additions and updates. For each action, you can see the date when the action occurred, the user who performed the action, and from what workstation.

### To view document history

1. Open a batch.
2. On the job step window, click the **Tools** menu, and then click **Document History**.

## Batch Options

After you open a batch, there are many options available for working with it. The options described in this section are available from most job steps. (See "Batch Grids Summary" on page 21 for information about working with batches that are not open.)


See the following sections for instructions to perform the referenced tasks from the job step window.

- See "Submit a Complete Batch" below for instructions to submit a complete batch.
- See "Submit an Incomplete Batch" below for instructions to submit an incomplete batch.
- See "Submit a Batch and Create a New One" on the facing page for instructions to submit and create a new batch in a single operation.
- See "Batch Information" on page 50 for information about how to access the data the system records for each batch.
- See "Browse Batch Window" on page 50 for information about the tasks you can perform from the **Browse Batch** window.

### Submit a Complete Batch

When you submit a batch as complete, it is processed and then moved to the next job step.


#### To submit a complete batch

1. On the job step window, do one of the following:
  - On the **File** menu, point to **Submit Batch**, and then click **Complete**.
  - On the toolbar, click **Submit Batch (Complete)** .
2. If a confirmation message appears, click **Yes** to proceed.
3. If you are submitting a batch from an indexing step, a message might appear asking if you want to verify the index values before submission. To do so, click **Yes**.

### Submit an Incomplete Batch

You can submit a batch that has not been completely processed (for example, indexed or scanned). Submitting an incomplete batch allows you or another operator to assume ownership and then continue working on the batch at a later time. When you submit an incomplete batch, it is not moved to the next job step.

#### To submit an incomplete batch


1. On the job step window, do one of the following:
  - On the **File** menu, point to **Submit Batch**, and then click **Incomplete**.
  - On the toolbar, click **Submit Batch (Incomplete)** .
2. If a confirmation message appears, click **Yes** to proceed.
3. If you are submitting a batch from an indexing step, a message might appear asking if you want to verify the index values before submission. To do so, click **Yes**.



## Submit a Batch and Create a New One

To submit and create new batches, your PaperVision Capture administrator must assign you user rights to do so. When you use the **Submit and Create New Batch** command, PaperVision Capture submits the current batch, and then immediately creates a new one.

### To submit a batch and create a new one

1. On the job step window, do one of the following:
  - On the **File** menu, click **Submit And Create New Batch**.
  - On the toolbar, click **Submit And Create New Batch** .
2. If a confirmation message appears, click **Yes** to proceed.
3. In the **New Batch** dialog box, from the **Job** list, select the job you want to use to process the batch.
4. From the **Start Step** list, select the start step for the job.



#### NOTE

If you are unsure which job or start step to select, contact your PaperVision Capture administrator.

---

5. In the **Name** box, type the name of the batch.
6. In the **Date** box, type or select the date you want to set for the batch.
7. In the **Time** box, type or select the time you want to set for the batch.



#### NOTE

If you change the default value in the **Date** and/or **Time** boxes, your entry appears in the **Operator Provided Date** column on the **Batches Waiting** and **Batches Owned** grids.

---

8. In the **Description** box, type a description for the batch.  
Your entry appears in the **Batch Description** column on the **Batches Waiting** and **Batches Owned** grids.
9. Click **OK**.

## Batch Information

For each batch, you can view the following information:

- Batch Name
- Batch ID
- Scheduled Destruction Date
- Job Name
- Step Name
- Total Number of Documents

### To view batch information

1. Open a batch.
2. On the job step window, click the **Tools** menu, and then click **Batch Information**.

## Browse Batch Window

Your PaperVision Capture administrator must give you access to the **Browse Batch** window. From the **Browse Batch** window, you can:

- Locate documents containing specific index values (or blank index values), document numbers, and page counts.
- Delete documents.
- Print all rows or only those selected.
- Export all rows or only those selected.
- Specify the columns that appear and in what order.

For the **Browse Batch** window, you can specify whether the window retains its last position and state (open or closed). See "To specify settings for the single display view" on page 129 and "To specify settings for the multiple display view" on page 129 for information about setting this option.

### To open the Browse Batch window

1. Open a batch.
2. On the **View** menu, point to **Windows**, and then select **Browse Batch**.



#### T I P

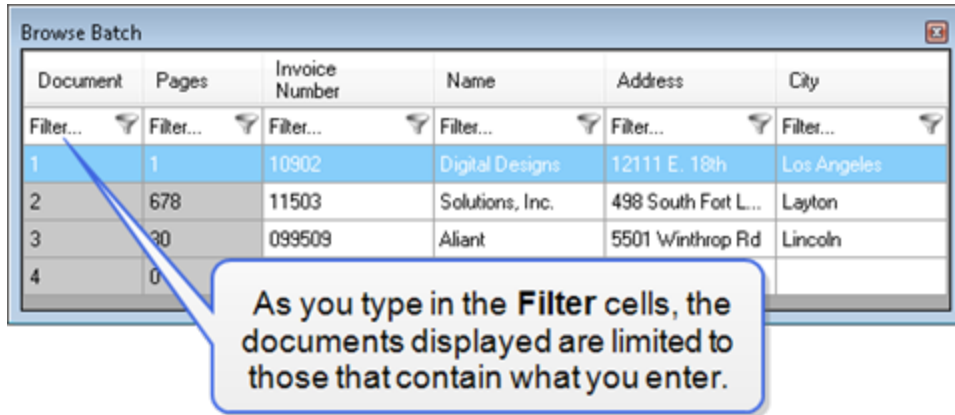
To place focus on the **Browse Batch** window, press the F6 key.

---

The following procedures describe tasks you can perform from the **Browse Batch** window.

### To locate documents from the Browse Batch window

1. On the **Browse Batch** window, in the filter cells, type one or more characters to apply the filter.



2. In the **Filter** cells for each column you can enter:
  - **Document** column - numeric values that indicate the document position number within the batch.
  - **Pages** column - numeric values that indicate the number of pages comprising the document.
  - Index columns - any value, or you can select **<Blank>** to locate documents containing empty index values.
3. Press Enter, or use the arrow keys to locate the document.



#### T I P

To clear all filter criteria, press Shift+Ctrl+F or right-click within the **Browse Batch** window, and then select **Clear Filters**.

### To delete documents from the Browse Batch window

1. On the **Browse Batch** window, locate, and then select the document(s) that you want to delete. (See "To locate documents from the Browse Batch window" above if you need help locating documents.)
2. Right-click on a selected document, and then click **Delete Documents**.

### To print rows from the Browse Batch window

1. On the **Browse Batch** window, select the row(s) you want to print.
2. Right-click on a selected row, and then point to **Print**.
3. Do one of the following:
  - Click **All Rows** to print every row.
  - Click **Selected Rows** to print only the selected rows.
4. In the **Print** dialog box, specify the print parameters, and then click **OK**.



#### NOTE

Only the information contained in the **Browse Batch** window is printed. The content of referenced documents is not printed.

---

### To export rows from the Browse Batch window

1. On the **Browse Batch** window, select the row(s) you want to export.
2. Right-click on a selected row, and then point to **Export**.
3. Do one of the following:
  - Click **All Rows** to export every row.
  - Click **Selected Rows** to export only the selected rows.
4. In the **Save As** dialog box, specify the location and name for the XML file, and then click **Save**.



#### NOTE

Only the information contained in the **Browse Batch** window is exported. The content of referenced documents is not exported.

---

### To configure columns on the Browse Batch window

1. Right-click on the heading row of the **Browse Batch** window, and then click **Configure Grid**. (If no index fields are defined, the **Configure Grid** command is not available.)
2. In the **Select Columns** dialog box, select the check boxes for the columns that you want to appear, and clear the check boxes for the columns you want to hide.
3. To change the display order for a column, select it, and then click **Move Up** or **Move Down**.
4. To restore the original settings, click **Reset**.
5. Click **OK** to save your settings.

## View Options

After you open a batch, there are many options available for how you view it. The options described in this section are available from most job steps. See the following sections for instructions to perform the referenced tasks from the job step window.

- See "Scale Options" on the facing page for information about the scaling options you can apply.
- See "Zoom Options" on page 54 for information about the zoom options you can apply.

- See "Zoom Zones and Scaling (Order of Operations)" on the next page for information about the order of application for scaling and zoom options.
- See "Single Display View" on page 55 for instructions about using this view.
- See "Multiple Display View" on page 56 for instructions about using this view.
- See "Toolbars" on page 56 for information about displaying and hiding toolbars, and other toolbar options.
- See "Status Bar" on page 57 for information about displaying and hiding the status bar.
- See "Batch Scroll Bar" on page 57 for information about displaying and hiding the batch scroll bar.
- See "Windows" on page 58 for information about displaying and hiding windows.

## Scale Options




Scale commands let you set how images are sized to appear on the main window.



### NOTE

Scale commands are available only on the single display view. (To open this view, click the **View** menu, point to **Organization**, and then select **Single Display**.)

You can set the following scale options.

- **Scale to Window**  determines the best method (scale to width or height) to fit the image within the window.
- **Scale to Width**  sizes the image to the width of the screen.
- **Scale to Height**  sizes the image to the height of the screen.

See "Zoom Zones and Scaling (Order of Operations)" on the next page for information about the retention and precedence of zoom zones and scaling.

### To scale an image

1. On the job step window, go to the image you want to scale.
2. Do one of the following:
  - On the **View** menu, point to **Scale**, and then click the scale command you want to apply.
  - On the toolbar, click the scale command you want to apply.
  - On the image, right-click, point to **Scale**, and then click the scale command you want to apply.

### To reset the scale of an image

- On the job step window, on the image you want to reset, do one of the following:
  - On the **View** menu, click **Reset Image**.
  - On the toolbar, click **Reset Image** .
  - On the current page, right-click, and then click **Reset Image**.

## Zoom Options



Zoom commands let you zoom in and out on an image.



### NOTE

Zoom commands are available only on the single display view. (To open this view, click the **View** menu, point to **Organization**, and then select **Single Display**.)

You can use the following zoom options.


- **Zoom In**  increases the size of the image each time you click the command.  
You can also zoom in on a specific area by clicking the left mouse button and dragging the pointer around the region you want to magnify.
- **Zoom Out**  decreases the size of the image each time you click the command.

See "Zoom Zones and Scaling (Order of Operations)" below for information about the retention and precedence of zoom zones.

### To zoom in or out on an image

1. On the job step window, go to the image you want to zoom in or out on.
2. On the toolbar, click the zoom command you want to apply.

### To reset the zoom of an image

- On the job step window, on the image you want to reset, do one of the following:
  - On the **View** menu, click **Reset Image**.
  - On the toolbar, click **Reset Image** .
  - On the current page, right-click, and then click **Reset Image**.

## Zoom Zones and Scaling (Order of Operations)

You can apply the following zoom zones and scaling options to the images you view.

- Index zoom zones that are defined by your PaperVision Capture administrator.
- Zoom zones that you apply using the **Zoom In** and **Zoom Out** commands on the toolbar. (See "Zoom Options" above for information about using these commands.)
- Scaling options that you apply using the **Scale to Window**, **Scale to Width**, and **Scale to Height** commands. (See "Scale Options" on the previous page for information about using these commands.)

The **Hold Zoom Regions** system preference affects how zoom zones are handled as you navigate through documents.

### To set the Hold Zoom Regions system preference

1. On the job step window, click the **Tools** menu, and then click **Options**.
2. Click **System Preferences**.
3. In the **Navigation** area, select or clear the **Hold Zoom Regions** check box.

When this check box is selected, zoom regions you set on an image are retained as you navigate through the document.

When this check box is cleared, zoom regions are not retained as you navigate through the document.


Zoom zones and scaling operations are applied in the following order:

1. Defined index zoom zones take precedence over all zoom zone or scaling settings applied on images in the PaperVision Capture Operator Console. Therefore, when you navigate to an index field defined by an index zoom zone, the index zoom zone is applied. If you turn on the **Hold Zoom Regions** system preference, any zoom zone that you apply is retained until you navigate to an index field defined with a different zoom zone.
2. If you turn on the **Hold Zoom Regions** system preference, any zoom zone that you apply on the image is retained across all index fields, pages, and documents.
3. If you turn off the **Hold Zoom Regions** system preference, any zoom zone that you apply on the image is not retained across index fields, pages, and documents.
4. Finally, any scaling that you apply on the image takes precedence over the **Hold Zoom Regions** system preference and any zoom zone that you applied on the image. However, scaling the image does not impact any defined index zoom zones, which take precedence over all settings and operations.

## Single Display View

The single display view displays one image at a time in the main window. For the single display view, you can specify the quality of the images that appear, and whether you want to display only one document at a time, or all documents in the batch. See "To specify settings for the single display view" on page 129 for information about setting these options.

### To open the single display view

1. Open a batch.
2. Do one of the following:
  - On the **View** menu, point to **Organization**, and then select **Single Display**.
  - On the toolbar, click **Single Display** .

## Multiple Display View

The multiple display view displays multiple images at a time in the main window. For the multiple display view, you can specify the number of rows and columns to display the images, and whether you want to display only one document at a time, or all documents in the batch. See "To specify settings for the multiple display view" on page 129 for information about setting these options.

### To open the multiple display view

1. Open a batch.
2. Do one of the following:
  - On the **View** menu, point to **Organization**, and then select **Multiple Display**.
  - On the toolbar, click **Multiple Display** .

## Toolbars

The **Toolbars** command lets you specify which toolbars you want to display or hide on the main window.

### To display or hide toolbars

1. Open a batch.
2. Click the **View** menu, and then point to **Toolbars**.
3. Do one of the following:
  - To cause a toolbar to appear on the main window, select it by placing a check mark next to it.
  - To hide a toolbar, clear the check mark by clicking it.

### To customize toolbars

1. Open a batch.
2. On the **View** menu, point to **Toolbars**, and then click **Customize**.
3. Click **Toolbars** to open the **Customize Toolbars** pane. ( See "Customize Toolbars" on page 136 for information about how to use the **Customize Toolbars** pane.)

For information about each tool bar, see the following:

- See "Scanner Commands" on page 64 for a description of the commands on the **Scanning** toolbar.
- See "Standard Options Overview" on page 30 for a description of the commands on the **Standard** toolbar.
- See "Navigate Documents" on page 43 and "Navigate Pages" on page 35 for a description of the commands on the **Batch Navigation** toolbar.
- See "Indexing Toolbar Commands" on page 67 for a description of the commands on the **Indexing** toolbar.
- See "QC Menu and Toolbar Commands" on page 79 for a description of the commands on the **QC** toolbar.



## Status Bar

The **Status Bar** command lets you display or hide the status bar that appears at the bottom of the job step window. The status bar displays the following information.

- Batch Name
- User Name
- Scanner Status
- Internal Document ID (internal number assigned to the document by Capture)
- Document Count (shows the current document and the total number of documents in the batch, for example, Doc 3 of 16)
- Page Count (shows the current page and the total number of pages in the document, for example, Page 4 of 18)
- Index Values

### To display or hide the status bar

1. Open a batch.
2. Click the **View** menu, and then do one of the following:
  - To cause the status bar to appear on the main window, select it by placing a check mark next to it.
  - To hide the status bar, clear the check mark by clicking it.

## Batch Scroll Bar

The **Batch Scrollbar** command lets you display or hide the scroll bar that appears at the bottom of the job step window. You can use the batch scroll bar to move through the pages in a batch by clicking the arrows on the ends of the scroll bar, or dragging the slider. When you rest your mouse on the batch scroll bar, it displays the selected image's document and page index numbers for the selected image (for example, Document Index: 1, Page Index: 14). This information shows the position of the image relative to the batch.

### To display or hide the batch scroll bar

1. Open a batch.
2. Click the **View** menu, and then do one of the following:
  - To cause the status bar to appear on the main window, select it by placing a check mark next to it.
  - To hide the status bar, clear the check mark by clicking it.

### Windows

Several windows are available that you can display or hide on the main window. The **Thumbnails** window is available to all users, but access to the other windows depends on whether your PaperVision Capture administrator has assigned you user rights to them.

#### To display or hide windows

1. Open a batch.
2. Click the **View** menu, and then point to **Windows**.
3. Do one of the following:
  - To cause a window to appear on the main window, select it (a check mark appears).
  - To hide a window, clear the check mark by clicking it.

For information about each window, see the following:

- See "Thumbnails Window" below for more information about using the **Thumbnails** window.
- See "Browse Batch Window" on page 50 for descriptions of the tasks you can perform on the **Browse Batch** window.
- See "Indexing Step Overview" on page 66, and then go to the section for the indexing task you are performing for information about using the **Index Manager** window.
- See "Browse QC Tags Window" on page 85 for a description of the tasks you can perform on the **Browse QC Tags** window.
- See "QC Tag Details Window" on page 84 for a description of each component on the **QC Tag Details** window.

### Thumbnails Window

The **Thumbnails** window displays thumbnail images of the pages in a document.



#### NOTE

The **Thumbnails** window is available only on the single display view. (To open this view, click the **View** menu, point to **Organization**, and then select **Single Display**.)

---

#### To open the Thumbnails window


1. Open a batch.
2. On the **View** menu, point to **Windows**, and then select **Thumbnails**.
3. Click the image you want to display on the main window.
4. You can right-click on an image on the **Thumbnails** window to access available commands.

You can specify the number of images you want to appear on the **Thumbnails** window, and whether the window retains its last position and state (open or closed). See "To specify settings for the single display view" on page 129 to set these options.

## Custom Code

The **Execute Custom Code** command is available if your PaperVision Capture administrator provides a program file that you can run from your job step. For example, a customized program file can validate your indexing entries against an external database, or your indexing entries can update an external database.

### To execute custom code

1. Open the appropriate batch, and ensure that you are in the correct job step to run the custom code.
2. Do one of the following:
  - On the **Edit** menu, click **Execute Custom Code**.
  - On the toolbar, click **Execute Custom Code**  .

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# CHAPTER 4

## Capture Step

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|                             |    |
|-----------------------------|----|
| Capture Step Overview ..... | 62 |
| Import Batch .....          | 62 |
| Scanner Commands .....      | 64 |



## Capture Step Overview

If you are assigned to the Capture step by your PaperVision Capture administrator, the Capture Step window appears after you initially take ownership of and open a batch. From the Capture Step window, you can scan and import batches, work with documents and pages, and submit batches. See "Batch Options" on page 48 for information about working with batches from a job step. See "Standard Options Overview" on page 30 for information about the functions that are available from most job step windows.

See the following sections for information about the tasks you can perform only from the Capture Step.

- See "Import Batch" below for instructions to import a batch.
- See "Scanner Commands" on page 64 for a description of available scanner commands.

If you are assigned to perform indexing while you scan, see "Indexing Step Overview" on page 66 for information about indexing tasks.

If you are assigned to review documents, pages, or index values while you scan, see "Apply QC Tags" on page 82 for information about using quality control tags.

## Import Batch

To import batches, your PaperVision Capture administrator must assign you permissions to do so. When you import a batch, PaperVision Capture creates a new document at the end of the current batch, and then inserts the images.







### To import a batch

1. From the Capture step, click **File**, and then click **Import Batch**.
2. In the **Batch Import** dialog box, from the **Drive** list, select the drive where the batch you want to import is located.
3. In the **Folders** area, select the directory you want to import, and then click **Add**.  
The directory is moved to the **Directories Queued for Import** area.
4. Repeat the previous step for each directory you want to import.
5. (Optional) To remove a directory from the **Directories Queued for Import** area, select the directory, and then click **Remove**. To remove all of the directories, click **Clear**.
6. In the **File Type** box, you can specify the type of image you want imported. The default value is \*.\* which imports all file types. When entering multiple file types, place a semicolon between each one, for example, \*.jpg; \*.tif.
7. In the **Import Mode** area, select one of the following options:
  - Select **Manual** to use the **Manual Batch Import** window to review the images, and then determine which images to save or skip, and manually insert document breaks. You can also rotate the pages, invert page polarity, and reset the page view. The progress bar at the bottom of the screen helps you navigate through the images by displaying batch, image, document, and page information.
  - Select **Automated** to have the images imported automatically without your review, and then complete the following subprocedure.

8. If you selected **Automated** in the previous step, from the **Insert Document Breaks** list, select one of the following options:
  - **Use Job Step's Auto-Document Break Setting** - This setting is defined by your PaperVision Capture administrator, who assigned one of the following options to determine when a new document should be created. If you need more information, contact your PaperVision Capture administrator.
    - **None** - This option will not automatically create any document breaks, you must manually create them.
    - **Number of Pages Per Document** - This option sets the total number of pages that PaperVision Capture will scan or import before starting a new document. Your PaperVision Capture administrator may have the system display a message that asks you for a fixed number of pages before breaking to a new document.
    - **Barcode** - This option uses barcode zones (defined by your PaperVision Capture administrator) read during the scanning process to determine when a document break is inserted.
    - **Blank Page** - This option inserts a document break based on a blank page. Your PaperVision Capture administrator sets the file size for an image that is considered blank.
  - **Each Image File** - This option automatically imports multiple-page image files and separates them into multiple documents, placing a document break between each image file.
  - **Each Directory** - This option automatically imports images into multiple documents, placing a document break between each directory. For example, if you select a parent directory that contains subdirectories, document breaks are automatically inserted between the subdirectories.
9. Click **OK** to begin importing.
10. If an image cannot be imported, a message appears that identifies the invalid image and asks if you want to continue importing images. Do one of the following:
  - Click **Yes** to import the remaining images in the batch.
  - Click **No** to exit the import process from that image forward. The remaining images (located after the invalid image) will not be imported.

## Scanner Commands

The **Scanner** menu and toolbar appear only on the Capture job step and contain commands that let you scan specific pages and documents, mark new documents and scan, configure scanner settings, and insert pages into documents. The following table describes each scanner command. See "Scanner Settings" on page 126 for information about scanner configuration items.

| Toolbar Button and Command Name  | Function   | Keyboard Shortcut |
|--|--|-------------------|
| <br><b>Mark New Document and Scan</b> | Creates a new document, and then begins scanning pages into the new document.  | M                 |
| <br><b>Scan Pages</b>                 | Scans from your specified page to the end of the current document. A notification appears if you attempt to scan pages when the feeder does not contain paper.   | S                 |
| <br><b>Scan One Page</b>              | Scans your specified page. (If your scanner is configured for duplex scanning, only the front image is scanned.)   | O                 |
| <br><b>Re-Scan Pages</b>            | Re-scans your specified range of pages.  | A                 |
| <b>Insert Pages &gt;<br/>Before Current Page</b>   | Inserts pages before the current page. (If your PaperVision Capture administrator has defined page rotation, it will be applied.) This command does not apply barcode recognition or auto document breaks. | Ctrl+B            |
| <b>Insert Pages &gt;<br/>After Current Page</b>  | Inserts pages after the current page. (If your PaperVision Capture administrator has defined page rotation, it will be applied.) This command does not apply barcode recognition or auto document breaks.  | Ctrl+A            |
| <br><b>Stop Scanner</b>             | Stops the scanning process.  | Esc               |
| <b>Scanner Settings</b>  | Opens the <b>Configure the Scanner</b> pane where you can specify scanner settings. (See "Scanner Settings" on page 126 for more information.)   | E                 |
| <br><b>Saved Scanner Settings</b>   | Opens a list of saved scanner settings that you can select.  | Ctrl+F6           |



# CHAPTER 5

## Indexing Step

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|   |    |
|---|----|
| Indexing Step Overview .....              | 66 |
| Hand-Key Indexing .....                   | 67 |
| Manual Barcode Indexing .....             | 68 |
| Manual OCR Indexing .....                 | 69 |
| Merge Index Values .....                  | 70 |
| Add Detail Sets .....                     | 71 |
| Verify Index Values .....                 | 72 |
| Save Index Values .....                   | 73 |
| EDI QC (Business Rule Verification) ..... | 74 |



## Indexing Step Overview

If you are assigned to an Indexing step, you can enter, save, verify, and merge index values. You can also add detail set values. Your PaperVision Capture administrator defines indexes, and must give you access to the commands used to enter index values. The following three methods are available for entering index values:

- Hand-Key Indexing (See "Hand-Key Indexing" on the facing page for instructions to perform hand-key indexing.)
- Manual Barcode Indexing (See "Manual Barcode Indexing" on page 68 for instructions to perform manual barcode indexing.)
- Manual OCR Indexing (See "Manual OCR Indexing" on page 69 for instructions to perform manual OCR indexing.)

If you are unsure about which method to use, ask your PaperVision Capture administrator.



### T I P

To receive a message that notifies you when all documents have been indexed in the Capture or Indexing step, on the **Tools** menu, click **Options**, and then click **Indexing Preferences**. Select the **Save and Jump to Next Document with Blank Index Values** check box, and then click **OK**.

---

See the following sections for information about the tasks you can perform after index values are entered.

- See "Merge Index Values" on page 70 for instructions to combine index values.
- See "Add Detail Sets" on page 71 for information about detail sets and how to add them.
- See "Verify Index Values" on page 72 for information about ensuring the accuracy of hand-key indexing values.
- See "Save Index Values" on page 73 for instructions to save index values.

If you are assigned to review documents, pages, or index values, see "Apply QC Tags" on page 82 for information about using quality control tags.

If your site uses the EDI Business Rule, see "EDI QC (Business Rule Verification)" on page 74 for information about fixing missing or incorrect index values.




See "Standard Options Overview" on page 30 for information about the functions that are available from most job step windows.

## Indexing Toolbar Commands

In addition to the **Merge Index Values**, **Manual Barcode Index**, and **Manual OCR** indexing commands that appear on the standard toolbar, the **Indexing** toolbar contains the indexing commands described in the following table.

### To access indexing commands

- From the job step window, do one of the following:
  - Click the **File** menu.
  - To access index commands on the toolbar, click the **View** menu, point to **Toolbars**, and then select **Indexing**.

| Toolbar Button and Command Name   | Function  | Keyboard Shortcut |
|---|---|-------------------|
| <br><b>Save Indexes</b>          | Saves index values. (See "Save Index Values" on page 73 for more information.)  | Enter             |
| <br><b>Add Detail Set</b>        | Opens the <b>Add Details Sets</b> dialog box where you can type the number of detail sets you want to add. (See "Add Detail Sets" on page 71 for more information.) | Ctrl+D            |
| <br><b>Verify Index Values</b> | Verifies index values. (See "Verify Index Values" on page 72 for more information.)   | F7                |

## Hand-Key Indexing

If you are tasked with hand keying index values, you use the **Index Manager** to type values for the indexes. Your PaperVision Capture administrator may have assigned additional requirements while you hand key index values. For example, you may be restricted to select only from a defined list of index values. Or, you may be required to enter only valid index values (for example, a date in a Birth Date field or a number in a Social Security field).

### To hand key index values

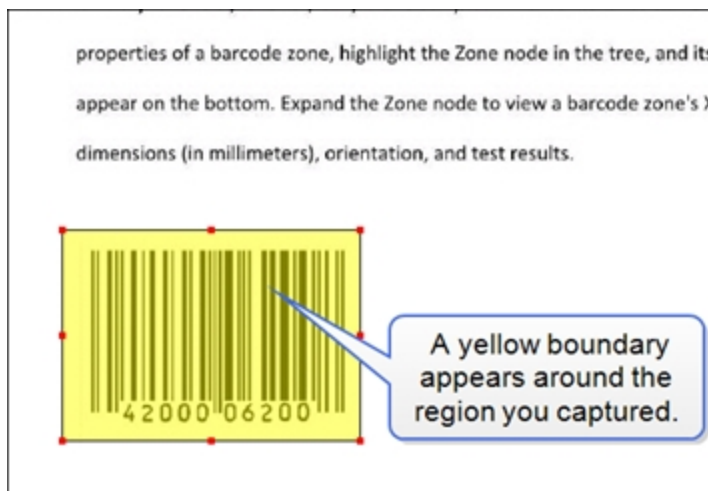
1. From the Indexing step, open the **Index Manager**. (Click **View**, point to **Windows**, and then select **Index Manager**.)
2. On the **Index Manager**, click the box in the **Value** column for the index you want to define.
3. Go to the appropriate page, and then type the value for the index.
4. You can use the Tab key to move to the next index, or Shift+Tab to move to the previous index.


## Manual Barcode Indexing

If you are tasked with using barcodes to define index values, you draw a region around barcodes to extract data that populates index fields. This feature lets you extract data from barcodes that may shift positions across pages and documents.

### To perform manual barcode indexing

1. From the Indexing step, open the **Index Manager**. (Click **View**, point to **Windows**, and then select **Index Manager**.)
2. On the **Index Manager**, click the box in the **Value** column for the index you want to define.
3. Go to the appropriate page, and then place the pointer on a corner of the barcode.
4. Hold down Shift while clicking the left mouse button, and then drag the pointer around the barcode region.



5. Do one of the following:
  - On the **Edit** menu, click **Manual Barcode Index**.
  - On the toolbar, click **Manual Barcode Index** .

The index value read from the barcode appears on the **Index Manager** window.



#### T I P

If the barcode was not read completely or the results seem inaccurate, adjust the region around the barcode or scan a clearer image.

### To remove a barcode region

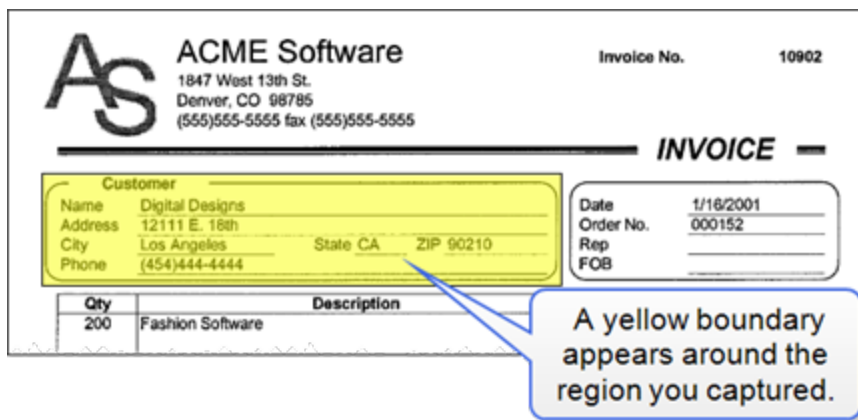
- Select the region, hold down Shift, and then press Delete.

## Manual OCR Indexing

If you are tasked with using OCR text to define index values, you draw a region around text to extract data that populates index fields. This feature lets you extract data from text that may shift positions across pages and documents.

### To perform manual OCR indexing

1. From the Indexing step, open the **Index Manager**. (Click **View**, point to **Windows**, and then select **Index Manager**.)
2. On the **Index Manager**, click the box in the **Value** column for the index you want to define.
3. Go to the appropriate page, and then place the pointer on a corner of the text you want to use for the index value.
4. Hold down Shift while clicking the left mouse button, and then drag the pointer around the text.



**AS** ACME Software  
1847 West 13th St.  
Denver, CO 98785  
(555)555-5555 fax (555)555-5555

Invoice No. 10902


**INVOICE**

| Customer |                 |       |              |
|----------|-----------------|-------|--------------|
| Name     | Digital Designs |       |              |
| Address  | 12111 E. 18th   |       |              |
| City     | Los Angeles     | State | CA ZIP 90210 |
| Phone    | (454)444-4444   |       |              |

|           |           |
|-----------|-----------|
| Date      | 1/18/2001 |
| Order No. | 000152    |
| Rep       |           |
| FOB       |           |

| Qty | Description      |
|-----|------------------|
| 200 | Fashion Software |

A yellow boundary appears around the region you captured.

5. Do one of the following:
  - On the **Edit** menu, click **Manual OCR Index**.
  - On the toolbar, click **Manual OCR Index** .

The index value read from the text appears on the **Index Manager** window.



#### T I P

If the text was not read completely or the results seem inaccurate, adjust the region around the text or scan a clearer image.

### To remove an OCR region


- Select the region, hold down Shift, and then press Delete.

## Merge Index Values

If the **Merge Index Values** command is available, you can use it to combine your indexing entries with those in the database assigned by your PaperVision Capture administrator. For example, you enter one required index value, a social security number, for an insurance invoice. You then click the **Merge Index Values** command, and the remaining two index fields, First Name and Last Name, are automatically populated.

If you are unsure of the exact index value while hand-key indexing, you can insert wildcard characters to perform a partial search against the database. For example, you can insert the percent sign ( % ) to specify any number of unknown characters to search for in an SQL, Sybase, or Oracle database; or, you can insert the asterisk ( \* ) to specify any number of unknown characters to search for in a Microsoft Access database. For information about specific wildcard characters, refer to the documentation for the respective database.

### To merge index values

1. From the Indexing step, open the **Index Manager**. (Click **View**, point to **Windows**, and then select **Index Manager**.)
2. On the **Index Manager**, click the box in the **Value** column for a required index, and then enter a value.
3. Do one of the following:
  - On the **Edit** menu, click **Merge Index Values**.
  - On the toolbar, click **Merge Index Values** .

If only one match is found, the entries in the database populate the remaining index fields. If more than one match is found, the **Record Selection** dialog box appears where you can find the correct record.



#### T I P

Click a column heading to sort the records in ascending or descending order. The sort order you select is maintained while you are logged on to the PaperVision Operator Console. The records return to their original sort order when you log off.

---

4. Do one of the following:
  - Select the correct record, and then click **OK**.
  - If you do not see the correct record, click **Cancel**.

## Add Detail Sets


If your PaperVision Capture Administrator has defined detail sets for the job to which you are assigned, you can insert detail set values in the **Index Manager**. (See "About Detail Sets" below for an example of how you can use detail sets.)



### T I P

To access the **Add Detail Set** command from a toolbar, ensure that the **Indexing** toolbar appears. Click **View**, point to **Toolbars**, and then select **Indexing**.

### To add detail sets

1. From the Indexing step, open the **Index Manager**. (Click **View**, point to **Windows**, and then select **Index Manager**.)
2. Do one of the following:
  - On the **File** menu, click **Add Detail Set**.
  - On the **Indexing** toolbar, click **Add Detail Set** .
3. In the **Add Details Sets** dialog box, type the number of detail sets you want to add.
4. Click **OK**.

The detail sets appear on the **Index Manager**.

## About Detail Sets

Detail sets are a collection of indexes that define "many-to-one" relationships, which allow multiple sets of field data to reference a single document.

### EXAMPLE

For example, in an accounts payable job, index fields are set up for the check number, check date, payee, invoice number, and invoice date. If the same check is used to pay multiple invoices from the same vendor, a single document may be represented as follows:

#### Original Index Fields

| Check Number | Check Date | Payee    | Invoice Number | Invoice Date |
|--------------|------------|----------|----------------|--------------|
| 12345        | 08/30/2015 | ABC Corp | A0001          | 08/01/2015   |
| 12345        | 08/30/2015 | ABC Corp | A0002          | 08/07/2015   |
| 12345        | 08/30/2015 | ABC Corp | A0003          | 08/14/2015   |

The first three index fields (Check Number, Check Date, and Payee) are duplicated per changing invoice number. Rather than duplicating the information in the first three fields, you can represent

the first three fields as index fields and assign the remaining two fields, Invoice Number and Invoice Date, as detail sets.

#### Index Fields After Detail Sets Are Created

| Check Number | Check Date | Payee    | Document ID * |
|--------------|------------|----------|---------------|
| 12345        | 08/30/2015 | ABC Corp | 654           |

\* The system Document ID is generated behind the scenes, hidden from your view.

#### Created Detail Sets

| Invoice Number | Invoice Date | Document ID * |
|----------------|--------------|---------------|
| A0001          | 08/01/2015   | 654           |
| A0002          | 08/07/2015   |               |
| A0003          | 08/14/2015   |               |

## Verify Index Values

To ensure the accuracy of hand-key indexing, the **Verify Index Values** command searches for blank values or other search string values (defined by your PaperVision Capture administrator) in the current batch. Depending on your indexing preferences settings (defined under **Tools > Options > Indexing Preferences**), index verification starts either at the beginning of the batch, or from the current document forward.



#### TIP

To access the **Verify Index Values** command from a toolbar, ensure that the **Indexing** toolbar appears. Click **View**, point to **Toolbars**, and then select **Indexing**.

### To verify index values

1. From the Indexing step, open the **Index Manager**. (Click **View**, point to **Windows**, and then select **Index Manager**.)
2. Do one of the following:
  - On the **File** menu, click **Verify Index Values**.
  - On the **Indexing** toolbar, click **Verify Index Values** .

The next document that has a field with a blank value or other values defined by your PaperVision Capture Administrator appears, and the field is selected on the **Index Manager**.




3. Make any needed corrections, and then verify the index values again.

If no blank values of defined search string values exist, a message appear that all indexes are verified.

4. Click **OK**.

The detail sets appear on the **Index Manager**.

## Save Index Values


After you enter your index values, you can save them prior to submitting the batch. Unsaved index values have an asterisk ( \* ) next to the index field name on the **Index Manager**. Upon saving index values, if you have not entered information for a required field (or entered an invalid index value), a red exclamation mark  appears on the **Index Manager** in the **Value** column for the field.




### T I P

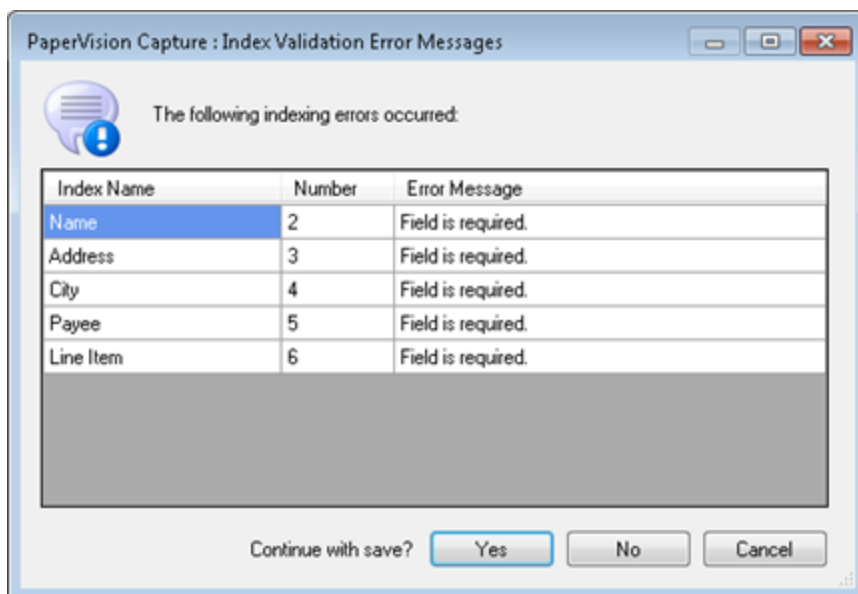
To access the **Save Indexes** command from a toolbar, ensure that the **Indexing** toolbar appears. Click **View**, point to **Toolbars**, and then select **Indexing**.

### To save index values

1. From the Indexing step, open the **Index Manager**. (Click **View**, point to **Windows**, and then select **Index Manager**.)
2. Do one of the following:
  - On the **File** menu, click **Save Indexes**.
  - On the **Indexing** toolbar, click **Save Indexes** .
  - In the **Index manager**, press Enter.

If there are no indexing errors, the indexes are saved.

If you have not entered information for a required field (or entered an invalid index value), a red exclamation mark  appears on the **Index Manager** in the **Value** column for the field. If there are any indexing errors, they appear in the **Index Validation Error Messages** dialog box similar to the following screen shot.



3. Click **No**, and then correct the indexing errors.
4. On the **File** menu, click **Save Indexes** to save the corrected index values.

**NOTE**

If your **Browse Batch** window is open, its index values are updated after they are saved.


## EDI QC (Business Rule Verification)

If you are tasked with reviewing documents for the EDI business rule, the **EDI QC** command is available on the **QC** menu. This command opens the **EDI QC** dialog box, where you can type any missing values or correct any index errors.

**TIP**

To access the **EDI QC** command from a toolbar, ensure that the **QC** toolbar appears. Click **View**, point to **Toolbars**, and then select **QC**.

### To perform EDI QC

1. From the Indexing step, do one of the following:
  - On the **QC** menu, click **EDI QC**.
  - On the **QC** toolbar, click **EDI QC** .

In the **EDI QC** dialog box, a list of indexes and their values appear on the right pane.

2. You can type any missing values, or correct any index errors in the **Value** column.

3. Click **Generate** to create and display an EDI file on the left pane.  
A list of warnings appear below the EDI file.
4. To make a correction, double-click the warning, and the associated segment in the EDI file appears above in yellow.
5. Repeat the previous three steps until there are no more warnings.
6. Click **Save**, and then close the **EDI QC** dialog box.

**I M P O R T A N T**

If you changed any index values, you must process the document through the EDI business rule again to include your changes in the output.

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# CHAPTER 6

## Manual Quality Control Step

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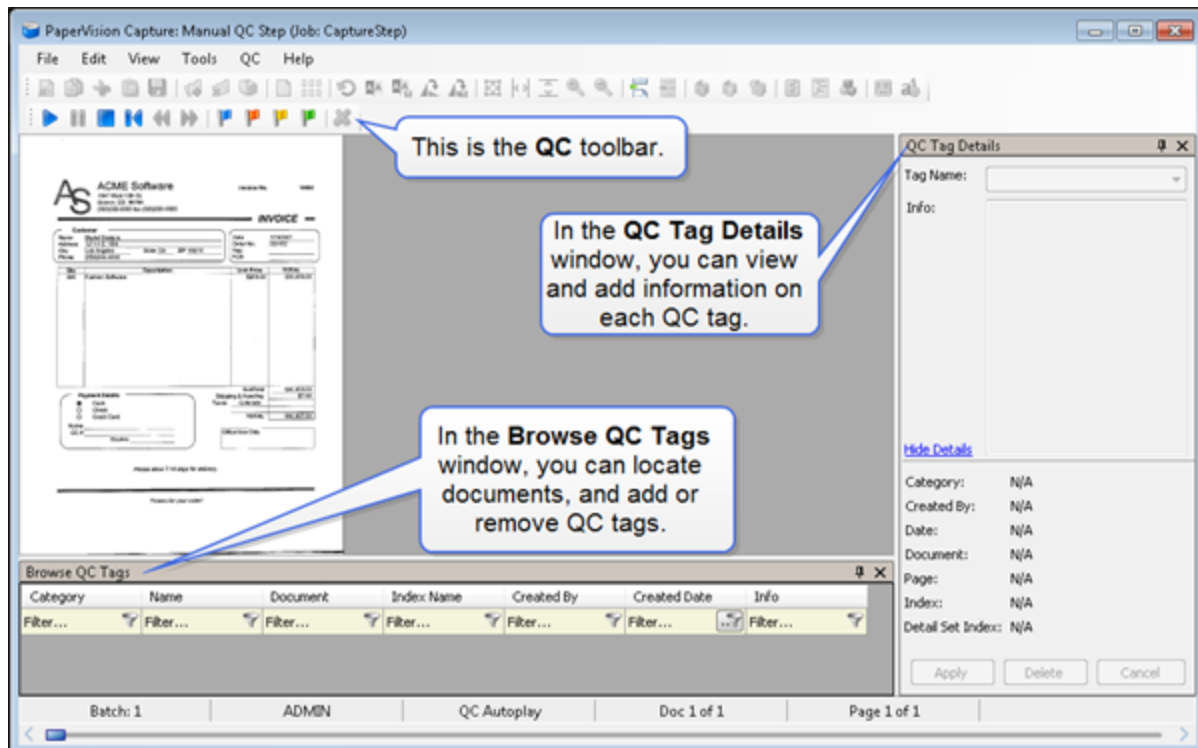
|  |    |
|--|----|
| Manual Quality Control Step Overview ..... | 78 |
| QC Menu and Toolbar Commands .....         | 79 |
| QC Auto Play .....                         | 80 |
| Apply QC Tags .....                        | 82 |
| QC Tag Details Window .....                | 84 |
| Browse QC Tags Window .....                | 85 |



## Manual Quality Control Step Overview

If you are assigned to a Manual QC step, you can inspect batches, documents, pages, and index fields to ensure that they do not require further processing or review. Within this step, you can automatically advance through documents and pages, manipulate documents and pages, and tag items that need to be re-scanned, re-indexed, or have other issues that need to be fixed. For example, you can apply a document-level tag that indicates an entire document needs to be re-scanned; in that same document, you can apply a page-level tag that indicates a page falls outside a specified file size range. Depending on your viewing preferences, you can perform manual QC operations in single or multiple display view.

Your PaperVision Capture administrator determines what tag names are available for selection and whether you can tag items while scanning or hand-key indexing. By default, the **Browse QC Tags** window, where you can locate documents and add or remove tags, appears at the bottom of the job step window. By default, the **QC Tag Details** window, where you can view and add details on each QC tag, appears to the right of the main window. You can move and size these windows to your working preference.



- See "QC Menu and Toolbar Commands" on the facing page for command descriptions.
- See "QC Tag Details Window" on page 84 for a more detailed description.
- See "Browse QC Tags Window" on page 85 for tasks you can perform from this window.
- See "Standard Options Overview" on page 30 for information about the functions that are available from most job step windows.

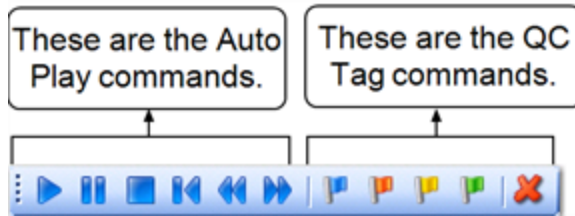
## QC Menu and Toolbar Commands

From a Manual QC step, the **QC** menu and toolbar contain the QC Auto Play and tagging commands.



### T I P





To access the QC Auto Play and tagging commands from a toolbar, ensure that the **QC** toolbar appears. Click **View**, point to **Toolbars**, and then select **QC**.










The **QC** menu and toolbar contain the QC Auto Play commands that let you automatically advance through batches, documents, and pages. This saves you time when you perform inspections, as you do not have to touch the keyboard or mouse to move between pages, documents, and batches.

The **QC** menu and toolbar also contain the tagging commands so you can apply batch, document, page, and index tags as necessary. Each QC tag is color-coded, and they appear in hierarchical order from left to right (batch, document, page, index) on the **QC** toolbar.

QC Auto Play and tagging commands are available only from the Manual QC job step or when your PaperVision Capture administrator requires you to inspect and tag items while scanning or indexing from the PaperVision Capture Operator Console.

| Toolbar Button and Command Name  | Function   | Keyboard Shortcut |
|--|--|-------------------|
| <br><b>Start QC Auto Play</b>   | Starts the automatic display of pages for your inspection.                   | Ctrl+Alt+Q        |
| <br><b>Pause QC Auto Play</b>   | Pauses the automatic display of pages.                                       | Ctrl+Alt+W        |
| <br><b>Exit QC Auto Play</b>    | Stops the QC Auto Play process.  | Ctrl+Alt+E        |
| <br><b>Restart QC Auto Play</b> | Returns to the first page of the first QC group of images (or single image). | Ctrl+Alt+S        |

| Toolbar Button and Command Name  | Function  | Keyboard Shortcut |
|--|---|-------------------|
| <br>Previous QC Group   | Returns to the previously-viewed group of images (or single image).   | Ctrl+Alt+R        |
| <br>Next QC Group       | Progresses to the next group of images (or single image).   | Ctrl+Alt+N        |
| <br>Add QC Batch Tag    | Selects the <b>Batch</b> category on the <b>QC Tab Details</b> window where you can select the correct tag, and then apply it to the batch.       | Ctrl+Alt+B        |
| <br>Add QC Document Tag | Selects the <b>Document</b> category on the <b>QC Tab Details</b> window where you can select the correct tag, and then apply it to the document. | Ctrl+Alt+D        |
| <br>Add QC Page Tag     | Selects the <b>Page</b> category on the <b>QC Tab Details</b> window where you can select the correct tag, and then apply it to the page.         | Ctrl+Alt+P        |
| <br>Add QC Index Tag    | Selects the <b>Index</b> category on the <b>QC Tab Details</b> window where you can select the correct tag, and then apply it to the index.       | Ctrl+Alt+I        |
| <br>Remove QC Tag     | Removes the QC tag(s) that you have selected on the <b>Browse QC Tags</b> window.   | Ctrl+Shift+Delete |

## QC Auto Play

The **QC** menu and toolbar contain the QC Auto Play commands that let you automatically advance through batches, documents, and pages. (See "QC Menu and Toolbar Commands" on the previous page for a description of each QC command.) To ensure that the **QC** toolbar appears, click **View**, point to **Toolbars**, and then select **QC**.

Using QC Auto Play saves you time when you perform inspections, as you do not have to touch the keyboard or mouse to move between pages, documents, and batches. After you start QC Auto Play, each page (in single display view) or thumbnail view of pages (in multiple display view) automatically appears for the amount of time designated by your PaperVision Capture administrator. Your PaperVision Capture administrator also determines how many pages and/or documents are skipped during auto play, how long each page or group of pages appears, and how many pages appear at one time. You can pause the QC Auto Play process to apply QC tags as needed. (See "Apply QC Tags" on page 82 for more information.)










**T I P**

When using QC Auto Play, you can move between groups of images with the batch scroll bar at the bottom of the screen. In addition, when you rest the cursor on the slider, you can see which image group is currently being viewed.



### To start QC Auto Play

1. From the Manual QC step, do one of the following:
  - On the **QC** Menu, click **Start Auto Play**.
  - On the **QC** toolbar, click **Start Auto Play** .

Each image or group of images appears in the main window for the amount of time set by your PaperVision Capture administrator.
2. If you see a problem with an image, for example, it falls outside of the specified size range or needs to be rescanned, you can click **Pause QC Auto Play**  on the **QC** menu or toolbar to temporarily stop auto play.
3. Perform the necessary corrective action, or apply the appropriate QC tag. (See "Apply QC Tags" on the next page for more information.)
4. On the **QC** menu or toolbar, select one of the following commands.
  - To continue QC Auto Play from your current location, click **Start QC Auto Play** .
  - To restart QC Auto Play from the beginning, click **Restart QC Auto Play** .
  - To return to a previously-viewed image or group of images, click **Previous QC Group** .
  - To advance to the next image or group of images, click **Next QC Group** .
  - To exit auto play, click **Exit QC Auto Play** .

**N O T E**

When you initially exit QC Auto Play, a confirmation message appears. If you do not want to receive future confirmation messages, check the **Suppress future QC auto play messages** check box. If you want confirmation messages to appear again, on the **Tools** menu, click **Options**, and then select **System Messages**. Under **General**, set the **Confirm Exit QC Auto Play** option to **True**.

## Apply QC Tags

You can apply QC tags:

- To batches, documents, pages, and index fields.
- In the single- or multiple-display organizational view.
- In the Manual QC step (or in the Capture or Indexing steps if you are tasked with performing QC operations while scanning or indexing).
- While using QC auto play. (See "QC Auto Play" on page 80 for more information.)

You can access QC tag commands on the **QC** menu or toolbar, and by right-clicking on a single page, the **Thumbnails** window, or the **Browse QC Tags** window. When you select a QC tag command, the **QC Tag Details** window becomes available, and you can select the tag name and enter additional details about each tag. (See "QC Tag Details Window" on page 84 for more information.)



### NOTE

If you are using QC auto play, you must click **Pause QC Auto Play** (on the **QC** menu or toolbar) before applying a QC tag.

---

### To apply a QC batch tag


1. Open a batch.
2. When you encounter a batch-level issue, do one of the following:
  - On the **QC** menu, click **Add QC Batch Tag**.
  - On the **QC** toolbar, click **Add QC Batch Tag** .
3. On the **QC Tag Details** window, select the appropriate tag from the **Tag Name** list. By default, the following tag names are available. (Your PaperVision Capture administrator may have defined additional tags.)
  - **Document Count** - This tag indicates that the document count for the batch is outside of the specified range.
  - **Index Sequence** - This tag indicates that at least one numeric index value is outside of the specified minimum and maximum values.
4. (Optional) In the **Info** box, you can type additional information about the tag.
5. Click **Apply** to save the tag.

### To apply a QC document tag


1. Open a batch.
2. When you encounter a document-level issue, do one of the following:
  - On the **QC** menu, click **Add QC Document Tag**.
  - On the **QC** toolbar, click **Add QC Document Tag** .

3. On the **QC Tag Details** window, select the appropriate tag from the **Tag Name** list. By default, the following tag names are available. (Your PaperVision Capture administrator may have defined additional tags.)
  - **Document Page Count** - This tag indicates that the page count for the document is outside of the specified range.
  - **Document Rescan** - This tag indicates that the document needs to be scanned again.
4. (Optional) In the **Info** box, you can type additional information about the tag.
5. Click **Apply** to save the tag.

### To apply a QC page tag

1. Open a batch.
2. When you encounter a page-level issue, do one of the following:
  - On the **QC** menu, click **Add QC Page Tag**.
  - On the **QC** toolbar, click **Add QC Page Tag** .
3. On the **QC Tag Details** window, select the appropriate tag from the **Tag Name** list. By default, the following tag names are available. (Your PaperVision Capture administrator may have defined additional tags.)
  - **Bad Image** - This tag indicates that the image cannot be opened.
  - **Bad Image Path** - This tag indicates that the image cannot be located.
  - **Image Dimensions** - This tag indicates that the image is outside of the specified height and width parameters.
  - **Image File Size** - This tag indicates that the image file size is outside of the specified range.
  - **Page Rescan** - This tag indicates that the page needs to be scanned again.
  - **Skipped Full Text Processing** - This tag can be automatically applied in an OCR step and indicates that the Nuance OCR engine was not able to read any text so only an image appears.
4. (Optional) In the **Info** box, you can type additional information about the tag.
5. Click **Apply** to save the tag.

### To apply a QC index tag

1. Open a batch.
2. When you encounter an indexing issue, do one of the following:
  - On the **QC** menu, click **Add QC Index Tag**.
  - On the **QC** toolbar, click **Add QC Index Tag** .
3. On the **QC Tag Details** window, select the appropriate tag from the **Tag Name** list. By default, the following tag names are available. (Your PaperVision Capture administrator may have defined additional tags.)
  - **Index Error** - This tag indicates that an indexing error exists.
  - **Reindex** - This tag indicates that a specific index field needs to be indexed again.

4. (Optional) In the **Info** box, you can type additional information about the tag.
5. Click **Apply** to save the tag.

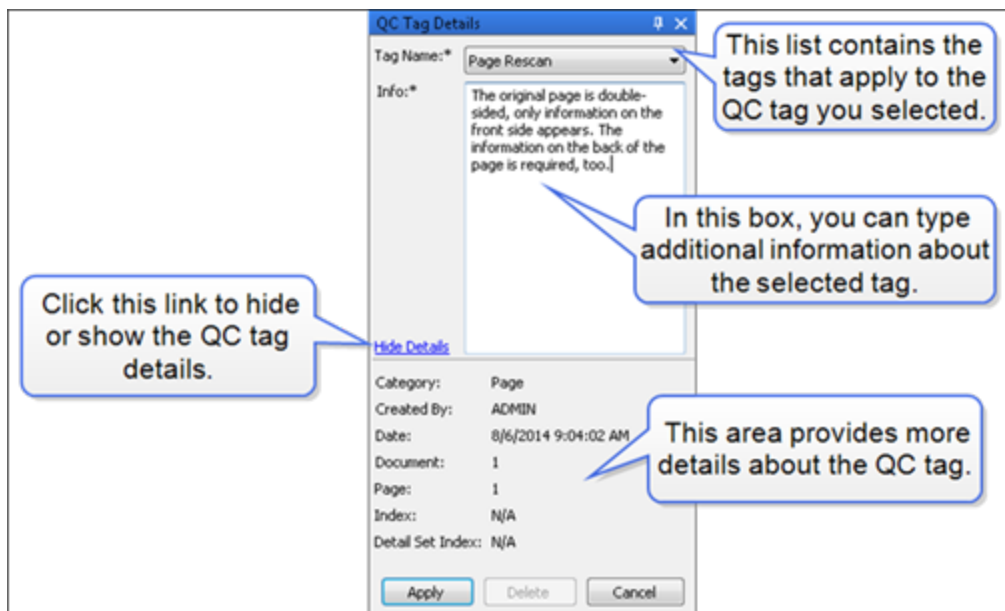
## QC Tag Details Window

When you select a QC tag command, the **QC Tag Details** window becomes available, and you can select the tag name and enter additional details about each tag. By default, there are some tag names defined for each category of QC tag: batch, document, page, and index. You PaperVision Capture administrator may have defined additional tags. (See "Apply QC Tags" on page 82 for information about the default tags available for each QC tag category.)

### To open the QC Tag Details window

1. Open a batch.
2. On the **View** menu, point to **Windows**, and then select **QC Tag Details**.

A sample of the **QC Tag Details** window and a description of its components follow.



- **Tag Name** contains the tags you can select for each category of QC tag (batch, document, page, or index).
- **Info** lets you type additional information about the tag. You can right-click in this box to access standard editing commands.
- **Hide Details** or **Show Details** link lets you hide or show details for the QC tag.
- **Category** shows the level (batch, document, page, index) at which the tag is applied.
- **Created By** shows the user who added the tag.
- **Date** shows the date and time the tag was applied.
- **Document** shows the tag's document number (if applicable).
- **Page** shows the tag's page position within the document (if applicable).

- **Index** shows the tag's current index value (if applicable).
- **Detail Set Index** shows the tag's detail set value (if applicable).

## Browse QC Tags Window

Your PaperVision Capture administrator must give you access to the **Browse QC Tags** window. From the **Browse QC Tags** window, you can:

- Locate, add, and remove QC tags.
- Print all rows or only those selected.
- Export all rows or only those selected.

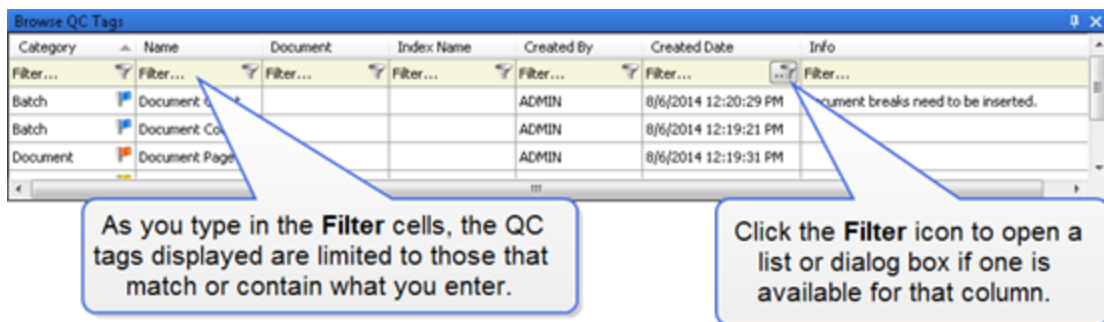
### To open the Browse QC Tag window

1. Open a batch.
2. On the **View** menu, point to **Windows**, and then select **Browse QC Tags**.

The following procedures describe tasks you can perform from the **Browse QC Tags** window.

### To locate QC tags using the Browse QC Tags window

1. Open a batch.
2. On the **View** menu, point to **Windows**, and then select **Browse QC Tags**.
3. In the **Filter** cells, type one or more characters to apply the filter.



#### TIP

To clear all filter criteria, press Shift+Ctrl+F or right-click within the **Browse QC Tags** window, and then select **Clear Filters**.

### To remove QC tags using the Browse QC Tags window

1. Open a batch.
2. On the **View** menu, point to **Windows**, and then select **Browse QC Tags**.
3. Locate, and then select the QC tag(s) that you want to delete. (See "To locate QC tags using the Browse QC Tags window" above if you need help locating tags.)
4. Right-click a selected QC tag, and then click **Remove QC Tags**.

### To add QC tags using the Browse QC Tags window

1. Open a batch.
2. On the **View** menu, point to **Windows**, and then select **Browse QC Tags**.
3. Locate, and then select the item to which you want to add a QC tag. (See "To locate QC tags using the Browse QC Tags window" on the previous page if you need help locating tags.)
4. Right-click a selected item, and then click the QC tag you want to add.
5. On the **QC Tags Details** window, select the appropriate tag from the **Tag Name** list.
6. (Optional) In the **Info** box, you can type additional information about the tag.
7. Click **Apply** to add the tag.

### To print rows from the Browse QC Tags window

1. Open a batch.
2. On the **View** menu, point to **Windows**, and then select **Browse QC Tags**.
3. Select the row(s) you want to print.
4. Right-click a selected row, and then point to **Print**.
5. Click either **All Rows** to print every row, or click **Selected Rows** to print only the selected rows.
6. In the **Print** dialog box, specify the print parameters, and then click **OK**.



#### NOTE

Only the information contained in the **Browse QC Tags** window is printed. The content of referenced documents is not printed.

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### To export rows from the Browse QC Tags window

1. Open a batch.
2. On the **View** menu, point to **Windows**, and then select **Browse QC Tags**.
3. Select the row(s) you want to export.
4. Right-click a selected row, and then point to **Export**.
5. Click either **All Rows** to export every row, or click **Selected Rows** to export only the selected rows.
6. In the **Save As** dialog box, specify the location and name for the XML file, and then click **Save**.



#### NOTE

Only the information contained in the **Browse QC Tags** window is exported. The content of referenced documents is not exported.

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# CHAPTER 7

## AP Processing Step

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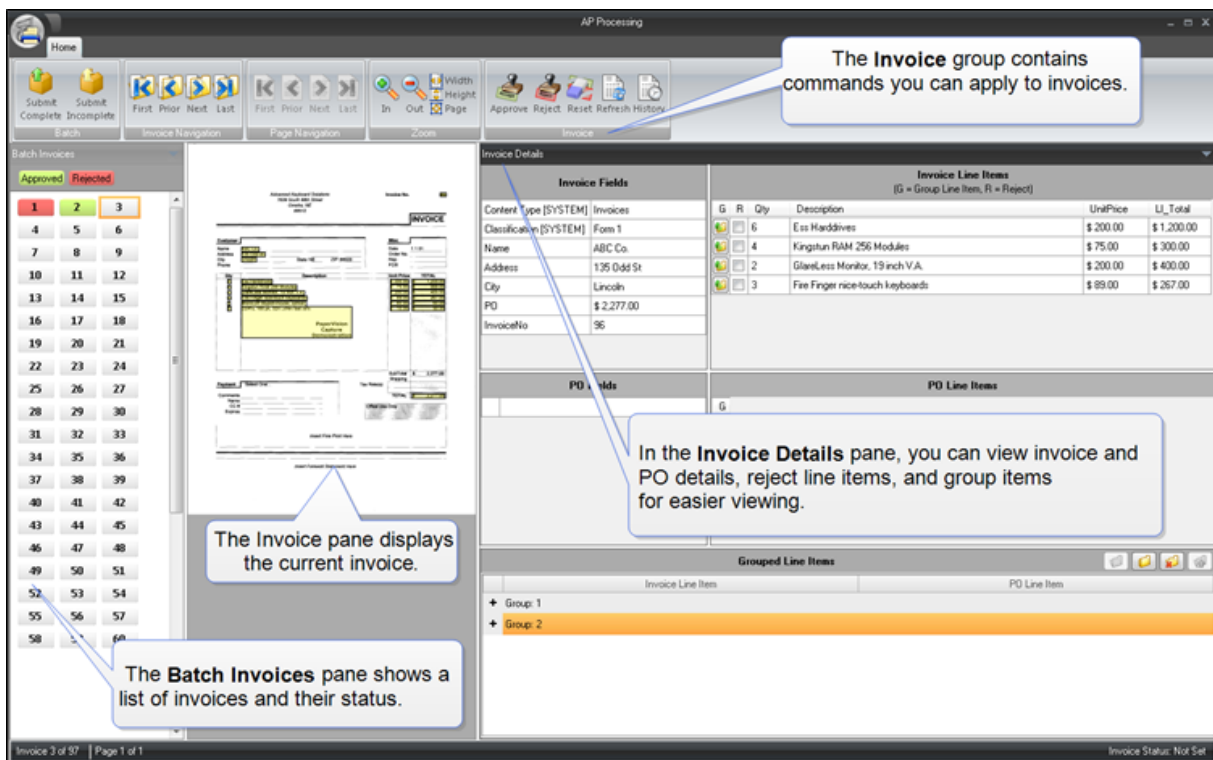
|                                   |    |
|-----------------------------------|----|
| AP Processing Step Overview ..... | 88 |
| Invoice and PO Line Items .....   | 89 |
| Invoice Status and History .....  | 91 |



## AP Processing Step Overview

If you are assigned to an AP Processing step, you can match invoice line items to PO line items, reject individual invoice line items, approve invoices, reject invoices, reset invoices, and submit batches. See "Invoice and PO Line Items" on the facing page and "Invoice Status and History" on page 91 for information about the tasks you can perform from the **AP Processing** window. See "Standard Options Overview" on page 30 for information about the functions that are available from most job step windows.

A sample of the **AP Processing** window and a description of its components follow.



## Batch Invoices Pane

The **Batch Invoices** pane displays a numerical inventory of the invoices in your batch, and indicates their status. You can navigate through the invoices using the controls in the **Invoice Navigation** and **Page Navigation** groups on the **Home** ribbon. You can also select any invoice by clicking it. The selected invoice appears to the right on the Invoice pane. If an invoice has been approved or rejected, its number will change color according to the legend at the top of the pane: green for approved, and red for rejected. (See "Invoice Status and History" on page 91 for more information.)

## Invoice Pane

The selected invoice displays on the Invoice pane. You can use the controls in the **Zoom** group on the **Home** ribbon to change the size and appearance of the invoice. (See "Standard Toolbar and Menu Commands" on page 30 for a description of the standard commands contained in the **Zoom** group.) The invoice contains links from the index fields and data sets to the corresponding invoice fields and invoice line items on the **Invoice Details** pane.



## Invoice Details Pane

You can use the **Invoice Details** pane to review the information from an invoice and match it to its associated purchase order(s). Information from the Capture indexes, detail sets, and the information from the external data set are organized in the following areas.

- **Invoice Fields** - This area contains the information from the Capture indexes of the selected invoice.
- **Invoice Line Items** - This area contains the Capture detail sets of the selected invoice. These line items can be grouped in the **Grouped Line Items** area, or rejected. (See "Invoice and PO Line Items" below for more information.)
- **PO Fields** - This area contains the PO information of the corresponding purchase order from an external source.
- **PO Line Items** - This area contains PO line item information of the corresponding purchase order from an external source. These line items can be grouped in the **Grouped Line Items** area. (See "Invoice and PO Line Items" below for more information.)


## Invoice and PO Line Items

Invoice line items are stored in Capture as detail sets, and PO line items come from the corresponding purchase order from an external source. From the AP Processing step, you work with invoice and PO line items on the **Invoice Details** pane. You can review the information from an invoice and match it to its associated purchase order(s). Information from the Capture indexes, detail sets, and the information from the external data set are organized in the following areas.





- **Invoice Fields** - This area contains the information from the Capture indexes of the selected invoice.
- **Invoice Line Items** - This area contains the Capture detail sets of the selected invoice. These line items can be grouped in the **Grouped Line Items** area, or rejected.
- **PO Fields** - This area contains the PO information of the corresponding purchase order from an external source.
- **PO Line Items** - This area contains PO line item information of the corresponding purchase order from an external source. These line items can be grouped in the **Grouped Line Items** area.

If your invoice has enough line items that it is difficult to view them all, or you want to remove invoice and PO line items that you have matched, you may find it helpful to group line items as a way to work through and organize them. Grouping line items helps you “clear off your desk” by moving matched line items from the **Invoice Line Items** and **PO Line Items** areas to the **Grouped Line Items** area. Line items do not have to be grouped to be approved or rejected. You can reject individual line items that do not meet your criteria. (See "To reject a line item" on page 91 for more information.)



When grouping line items, keep the following information in mind.


- Only one group can be open and available for new line items at a time.
- When selecting line items you want to group, they will be added to the open group.
- If there is not an open group, clicking  will move that line item to the **Grouped Items** area and start a new group.

### To group line items

1. From the AP Processing step, do one of the following:
  - On the **Batch Invoices** pane, click the invoice you want to review.
  - Use the commands in the **Invoice Navigation** group to locate the invoice you want to review.  
The invoice appears on the Invoice pane in the center of the window.
2. Do one of the following:
  - If you want to create a new group for the line items and there are no existing groups, go to the next step.
  - If you want to add the line items to an existing group, in the **Grouped Line Items** area, select the group and then click **Open Group** . If this command is not available, it means the group is already open. Go to the next step.
  - If you want to create a new group and there are existing groups, in the **Grouped Line Items** area, click **Close Group** , and then go to the next step.
3. On the **Invoice Details** pane, in the **Invoice Line Items** or **PO Line Items** area, click  in the **G** column of the item you want to group.  
The line item is moved to the **Grouped Line Items** area and placed either in the existing group you selected or in the newly created group.
4. Click  in the **G** column of the next line item you want to group.
5. Repeat the previous step until you have moved all the line items you want to group.

### To remove a line item from a group

1. From the AP Processing step, do one of the following:
  - On the **Batch Invoices** pane, click the invoice you want to review.
  - Use the commands in the **Invoice Navigation** group to locate the invoice you want to review.  
The invoice appears on the Invoice pane in the center of the window.
2. In the **Grouped Line Items** area, select the appropriate group and then click **Open Group** . (If this command is not available, it means the group is already open.)
3. If necessary, expand the group by clicking the plus sign  next to the group.

4. Select the line item you want to remove, and then click **Ungroup Line Item** .

The item is returned to either the **Invoice Line Items** or **PO Line Items** area.

### To delete a group

1. From the AP Processing step, in the **Grouped Line Items** area, select the group you want to delete.

2. Click **Delete Group** .

All of the items that were in the group are returned to either the **Invoice Line Items** or **PO Line Items** area.

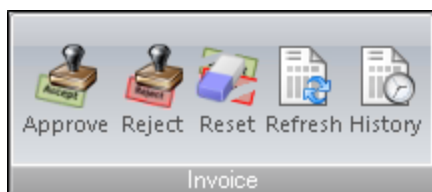
### To reject a line item

1. From the AP Processing step, do one of the following:
    - On the **Batch Invoices** pane, click the invoice you want to review.
    - Use the commands in the **Invoice Navigation** group to locate the invoice you want to review.

The invoice appears on the Invoice pane in the center of the window.
  2. On the **Invoice Details** pane, in the **Invoice Line Items** area, select the check box in the **R** column of the item you want to reject.
- A rejected line item cannot be grouped.
3. To reset the invoice line item, clear the check box.

## Invoice Status and History

After you have reviewed the invoice and PO line items, you can approve or reject the invoice. You can also reset the status of an invoice, refresh displayed invoices, and view the history of an invoice. The commands to perform these tasks are contained on the **Invoice** group on the **Home** tab.



### To approve an invoice

1. From the AP Processing step, do one of the following:
  - On the **Batch Invoices** pane, click the invoice you want to approve.
  - Use the commands in the **Invoice Navigation** group to locate the invoice you want to approve.

The invoice appears on the Invoice pane in the center of the window.

2. On the **Invoice** group, click **Approve**.

An “Approved” stamp is applied to (but not saved on) the invoice image. The next invoice appears on the Invoice pane.

### To reject an invoice

1. From the AP Processing step, do one of the following:
    - On the **Batch Invoices** pane, click the invoice you want to reject.
    - Use the commands in the **Invoice Navigation** group to locate the invoice you want to reject.

The invoice appears on the Invoice pane in the center of the window.
  2. On the **Invoice** group, click **Reject**.
- A “Rejected” stamp is applied to (but not saved on) the invoice image. The next invoice appears on the Invoice pane.

### To reset an invoice

1. From the AP Processing step, do one of the following:
    - On the **Batch Invoices** pane, click the invoice you want to reset.
    - Use the commands in the **Invoice Navigation** group to locate the invoice you want to reset.

The invoice appears on the Invoice pane in the center of the window.
  2. On the **Invoice** group, click **Reset**.
  3. In the confirmation message, click **Yes**.
- The accept or reject status and all groupings are removed from the invoice.

### To refresh the displayed invoice

1. From the AP Processing step, on the **Invoice** group, click **Refresh**.
- The invoice and PO data are checked for updates, and the most current information appears.
2. In the confirmation message, click **OK**.



#### T I P

The application automatically checks for invoice and PO changes every time you navigate to an invoice.

---

### To view invoice history

1. From the AP Processing step, do one of the following:
    - On the **Batch Invoices** pane, click the invoice for which you want to view the history.
    - Use the commands in the **Invoice Navigation** group to locate the invoice for which you want to view the history.

The invoice appears on the Invoice pane in the center of the window.
  2. On the **Invoice** group, click **History**.
- The **Invoice History** dialog box shows a list of the activities performed on the invoice, when each activity occurred, and who performed it.
3. When you are finished viewing the history, click **Close**.

# CHAPTER 8

## Forms Designer Step

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|                                     |     |
|-------------------------------------|-----|
| Forms Designer Step Overview .....  | 94  |
| Forms Magic Designer Overview ..... | 94  |
| Batch Options .....                 | 97  |
| View Documents .....                | 98  |
| Manage Forms .....                  | 103 |
| Form Designer Overview .....        | 112 |
| Batch Processing .....              | 120 |
| Color Dropout Filters .....         | 121 |
| User Preferences .....              | 122 |

## Forms Designer Step Overview

If you are assigned to the Forms Designer step by your PaperVision Capture administrator, you can create and edit Forms Magic forms and process documents in a batch through Forms Magic to extract data for use in other job steps. The **Forms Magic Designer** appears after you initially take ownership of and open a batch. From the **Forms Magic Designer**, you can submit batches, view documents, manage Forms Magic forms, process batches, create color dropout filters, and set user preferences.

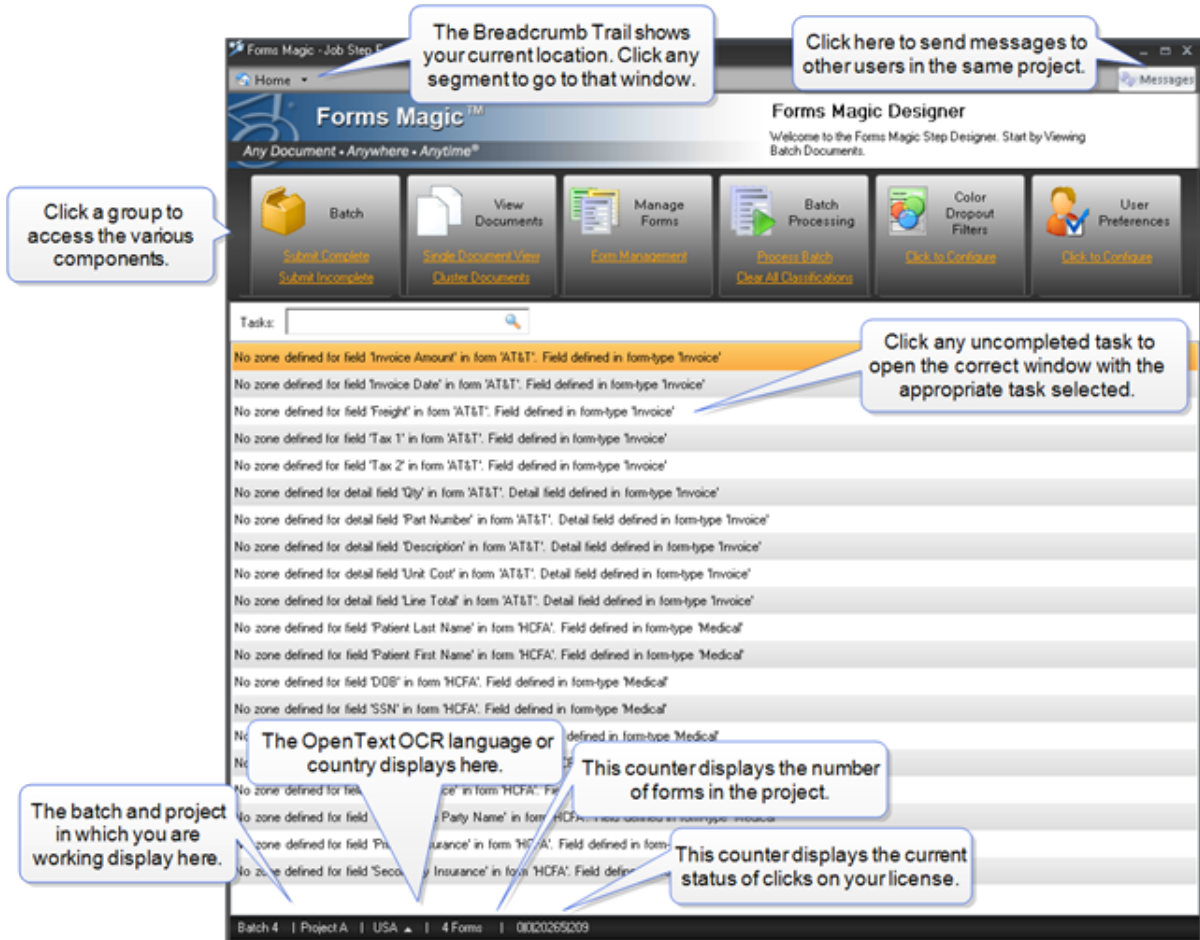
See the following sections for information about the tasks you can perform from the Forms Designer step.

- See "Batch Options" on page 97 for instructions to complete these tasks.
- See "View Documents" on page 98 for instructions to complete these tasks.
- See "Manage Forms" on page 103 for instructions to complete these tasks.
- See "Batch Processing" on page 120 for instructions to complete these tasks.
- See "Color Dropout Filters" on page 121 for instructions to complete these tasks.
- See "User Preferences" on page 122 for instructions to complete these tasks.

## Forms Magic Designer Overview

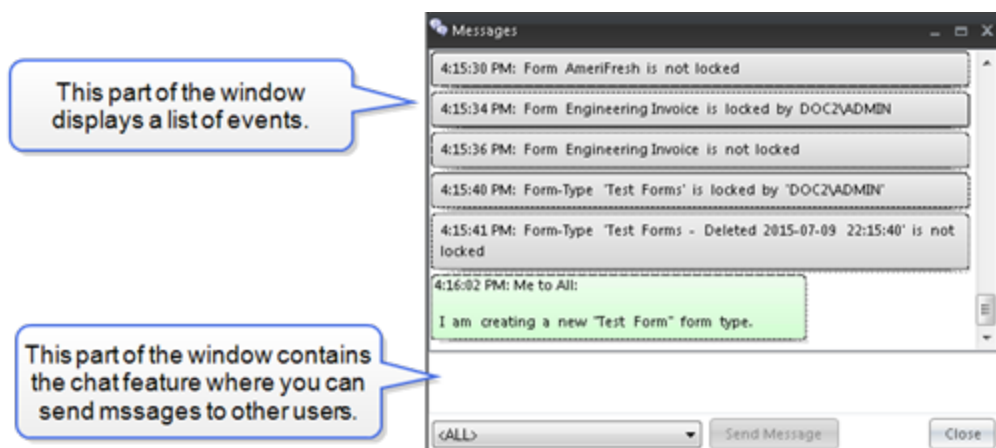
The **Forms Magic Designer** is the starting point for all the tasks you perform in the Forms Designer step. Any action you perform in the **Forms Magic Designer** happens in real time, and is saved automatically. More than one person can work in the same project at a time. From the **Forms Magic Designer**, you can open the necessary windows and designers to test classification and extraction, configure forms, indexes, and color dropout filters, and process and submit batches. The **Forms Magic Designer** appears after you initially take ownership of and open a batch.

A description of the components of the **Forms Magic Designer** follows.



## Messages

Click **Messages** on the **Forms Magic Designer** to open the following window.



The upper section of the **Messages** window displays: when forms were locked and unlocked, when forms and form types were added and deleted, user log in events, and messages to other users.

The lower section of the **Messages** window contains the chat feature where you can send messages to other users working in the project.

### To send a message

1. Click the down arrow, and then select the user to whom you want to send a message. To send a messages to everyone working in the project, select **<ALL>**.
2. Type your message in the box, and then click **Send Message**.

Your message appears in the event list.




## Clicks

You can rest the pointer on the **Clicks** area on the lower part of the **Forms Magic Designer** to display a click license counter. This counter displays the current status of clicks on your Capture Forms Processing license. Depending on the type of license you have, the counter shows either the number of clicks used, or the number of clicks remaining on your license. Clicks are consumed in the following manner.







- **Character** - A click is consumed for each keystroke extracted from a field.
- **Classification** - A click is consumed every time a document is processed by the Forms Magic engine.
- **Field** - A click is consumed for each index or detail field where extraction is performed, regardless of whether the field is populated.
- **Page** - A click is consumed every time Forms Magic creates an MVX file.

## Common Functions

Many of the designers and windows in Forms Magic contain commons functions and buttons. The following table describes common items found on many of the toolbars.

| Toolbar Button and Command Name   | Function   |
|---|--|
| <br><b>Zoom-In</b>   | Increases the view size of the document each time you click the command. |
| <br><b>Zoom-Out</b>  | Decreases the view size of the document each time you click the command. |
| <br><b>Fit Width</b> | Expands the document to fit the width of the page.                       |



| Toolbar Button and Command Name   | Function   |
|---|--|
| <br><b>Fit Height</b>                      | Expands the document to fit the height of the page.        |
| <br><b>Fit Page</b>                        | Expands the document to fit the page.                      |
| <br><b>Next Document</b>                   | Displays the next document in the viewer.                  |
| <br><b>Previous Document</b>               | Displays the previous document in the viewer.              |
| <br><b>Next Unclassified Document</b>      | Displays the next unclassified document in the viewer.     |
| <br><b>Previous Unclassified Document</b> | Displays the previous unclassified document in the viewer. |

## Batch Options

Once you have completed your tasks, or are done working on the Forms Designer job step, you can submit the batch in one of two ways. When you submit a complete batch, it is processed and transitioned to the next job stop.

### To submit a complete batch

1. On the **Forms Magic Designer**, in the **Batch** group, click **Submit Complete**.
2. Click **OK**.

When you submit an incomplete batch, the batch does not transition to the next job step, and it is moved to the **Batches Waiting** grid. This allows you or another user to take ownership and continue processing the batch at a later time.

### To submit an incomplete batch

1. On the **Forms Magic Designer**, in the **Batch** group, click **Submit Incomplete**.
2. Click **OK**.

## View Documents

In the **View Documents** group on the **Forms Magic Designer**, you can view documents individually, or view all the documents in the batch. Your user preferences determine whether or not classified documents are displayed.

If you want to view documents individually, click **Single Document View** to open the **Single Document View** window. From there, you can verify index value extraction, insert or delete page breaks, access the **Form Designer**, process a document or the entire batch, merge unclassified documents, add a new form, clear the classification of a single document or the entire batch, and access your user preferences. (See "Single Document View" below for more information.)

If you want to cluster documents, click **Cluster Documents** to access the **Clustering Input - Batch Documents** window. From there, you can view all the documents in the batch, cluster documents, view clusters, clear the classification of a single document or the entire batch, and access user preferences. (See "Cluster Documents" on page 101 for more information.)

## Single Document View

Clicking **Single Document View** in the **View Documents** group, opens the **Single Document View** window. The current document displays in the center pane. Based on your user preferences, the document may display a "Classified" watermark, highlighted classification words, highlighted extraction zones and text, and display extraction confidence indicators in the **Indexes** and **Detail Sets** panes. You can click on any index value or detail set value and the corresponding extraction zone and extracted text is highlighted on the document. You can verify document classification and data extraction, and add new forms for documents that did not classify.

The **Pages** pane displays a thumbnail of each page in the document. See "Common Functions" on page 96 for information about navigating through documents and document pages using the toolbar buttons. In the **Pages** pane, you can insert and remove document breaks. As documents breaks are inserted or removed, the resulting changes appear in the **Documents** pane.

### To insert and remove document breaks

You can insert and remove document breaks on the **Pages** pane. As documents breaks are inserted or removed, the resulting changes appear in the **Documents** pane.

1. On the **Forms Magic Designer**, in the **View Documents** group, click **Single Document View** to open the **Single Document View** window.
2. Navigate to the document to which you want to insert or remove page breaks. (See "Common Functions" on page 96 if you need help.) Each page of the document appears in the **Pages** pane.
3. Do one of the following:
  - To insert a document break, select the page in the **Pages** pane that you want to be the first page of the new document, and then click **Insert Document Break**.
  - To remove a document break, select the page in the **Pages** pane before the document break, and then click **Remove Document Break**.

### To access the Form Designer

For any classified document, you can open the corresponding form in the **Form Designer**.

1. On the **Forms Magic Designer**, in the **View Documents** group, click **Single Document View** to open the **Single Document View** window.
2. Navigate to the classified document for which you want to view the corresponding Forms Magic form. (See "Common Functions" on page 96 if you need help.)
3. Click **Form Designer** to open the form in the **Form Designer**.

### To add a new form

If you have a document that is unique or does not need to be clustered, you can add it directly as a form. Once Forms Magic has added the forms to the form type you selected, you can access and configure them from the **Forms Designer**, or from the **Manage Forms** group just as you would any other form.

1. On the **Forms Magic Designer**, in the **View Documents** group, click **Single Document View** to open the **Single Document View** window.
2. Navigate to the document you want to add as a new form. (See "Common Functions" on page 96 if you need help.)
3. Click **Add New Form** to open the **Add New Form** dialog box.
4. In the **Form Name** box, type the name you want to use for the new form.
5. To assign the form to a form type, do one of the following:
  - To assign the form to an existing form type, select the form type from the list.
  - To create a new form type, complete the following subprocedure:
    1. Click **New**, and then type a name for the new form type.
    2. To assign an image to the new form type, do one of the following:
      - To use an image provided by Forms Magic, click the down arrow, select the image from the list, and then click **OK**.
      - To use your own image, click **New**. In the **Open** dialog box, select the image you want to use, click **Open**, and then click **OK**.
6. If Forms Magic already recognizes the document as an existing form, you can force the system to add the document as a new form. **Select Force Add as New Form**, and then click **Force Add**. You should then use required words to prevent unpredictable classification results. (See "To specify required words" on page 110 for more information.)
7. Click **Yes** to open the **Form Designer**.

### To add a form page

You can add subsequent form pages on which you can define indexes, detail fields, and anchors for extracting data. This option is only available for classified documents.

1. On the **Forms Magic Designer**, in the **View Documents** group, click **Single Document View** to open the **Single Document View** window.
2. Navigate to the document to which you want to add a form page. (See "Common Functions" on page 96 if you need help.)
3. On the **Pages** pane, select the page you want to add to the form.
4. Click **Add Form Page**.

5. You can configure indexes, detail fields, zones, and anchors by opening the form in the **Form Designer**. (See "Form Designer Overview" on page 112 for more information.)

### To replace the setup image

On the **Pages** pane in the **Single Document View** window, the first page (**Page 1**) is the setup image and is used for classification. The following procedure describes how to change the setup image. This option is only available for documents that have been classified.



#### NOTE

You can only replace the setup image with an image of the same resolution. Attempting to use an image with a different resolution will result in an error, and the operation will be canceled.

---

1. On the **Forms Magic Designer**, in the **View Documents** group, click **Single Document View** to open the **Single Document View** window.
2. Navigate to the document for which you want to change the setup image. (See "Common Functions" on page 96 if you need help.)
3. On the toolbar, click **Replace Setup Image** to replace the setup image with the first page of the current document.
4. Click **OK**.

### To process a document or batch

You can process a single document or the entire batch to check classification results and verify data extraction.

1. On the **Forms Magic Designer**, in the **View Documents** group, click **Single Document View** to open the **Single Document View** window.
2. Navigate to the document you want to process. (See "Common Functions" on page 96 if you need help.)
3. (Optional) if the document has already been classified, click **Clear Classification**. If you want to clear the classification of all the documents in the batch, click **Clear All Classifications**.
4. Click **Process Document** to classify the document and extract the data. If you want to classify all the documents in the batch, click **Process Batch**.

### To merge unclassified documents

You can merge consecutive unclassified documents into single documents. For example, if documents 10, 11, 15, 16, and 17 did not classify, this option will combine documents 10 and 11 into a single document, and combine documents 15, 16, and 17 into another single document. This is useful when you are trying to manage unclassified documents, and want to use form-level document breaks to create new documents.

1. On the **Forms Magic Designer**, in the **View Documents** group, click **Single Document View** to open the **Single Document View** window.
2. Click **Merge Documents**. The new documents appear in the **Documents** pane.

### To set user preferences

1. On the **Forms Magic Designer**, in the **View Documents** group, click **Single Document View**

to open the **Single Document View** window.

2. Click **User Preferences** to open the **User Preferences** window. (See "User Preferences" on page 122 for information on setting these properties.)

## Cluster Documents

Clicking **Cluster Documents** in the **View Documents** group, opens the **Clustering Input - Batch Documents** window. Depending on your user preferences, the bottom pane displays unclassified documents, or all documents in the batch with a watermark on those that have been classified. From the **Clustering Input - Batch Documents** window, you can cluster documents, view clusters, clear the classification of a single document, clear all classifications, or set user preferences.

Clustering documents groups all like documents based on the first page of each document, and then compares them against any previously saved forms. You can view the results in the **Clustering Results** window. Groups of documents that do not match any previously saved forms are listed on the **New Forms** tab. Groups that match any previously saved forms are listed on the **Existing Forms** tab.

### To cluster documents

1. From the **Forms Magic Designer**, in the **View Documents** group, click **Cluster Documents** to open the **Clustering Input - Batch Documents** window.
2. (Optional) do one of the following if you want to clear the existing classification of documents in the batch.
  - To clear the classification of a single document, select the document, and then click **Clear Classification**.
  - To clear the classification of all documents in the batch, click **Clear All Classifications**.
3. (Optional) If you have already clustered documents, click **View Clusters** to open the **Clustering Results - Batch Documents** window.
4. Click **Start Clustering** and Forms Magic will group like documents together, and then display the results on the **Clustering Results - Batch Documents** window.
5. See "View Clusters" below for information about how to work with the results that appear in the **Clustering Results - Batch Documents** window.

### To set user preferences

1. From the **Forms Magic Designer**, in the **View Documents** group, click **Cluster Documents** to open the **Clustering Input - Batch Documents** window.
2. Click **User Preferences** to open the **User Preferences** window.
3. See "User Preferences" on page 122 for information on setting these properties.

## View Clusters

After clustering, the results are displayed in the **Clustering Results - Batch Documents** window. Groups of documents that do not match any previously saved forms are listed on the **New Forms** tab. Groups that match any previously saved forms are listed on the **Existing Forms** tab.

For the groups of documents that appear on the **New Forms** tab, you can create a new form. To create a new form, you must name it, assign it to an existing form type (or create a new one to which you will assign it). See "To create a new form" on the next page for instructions to complete these tasks. After you have created a new form, it appears on the **Existing Forms** tab. If you want to edit an existing form,

go to the **Forms** window. (See "Forms" on page 107 for instructions to open the **Forms** window and complete the tasks you can perform there.)

For the groups of documents that appear on the **Existing Forms** tab, you can access the **Form Designer**, or change the setup image.

### To create a new form

1. From the **Forms Magic Designer**, click **View Clusters** to open the **Clustering Results - Batch Documents** window. (See "Cluster Documents" on the previous page if you need help clustering documents.)
2. In the **Cluster Results - Batch Documents** window, on the **New Forms** tab, click the new form to which you want to assign a setup image.  
  
Thumbnails of the files in that cluster appear on the right pane, and a preview of any selected image appears on the middle pane.
3. In the **Form Name** box, type the name you want to use for the form.
4. To assign this form to a form type, do one of the following:
  - To assign the form to an existing form type, select the form type from the list.
  - To create a new form type, complete the following subprocedure:
    1. Click **New**, and then type a name for the new form type.
    2. To assign an image to the new form type, do one of the following:
      - To use an image provided by Forms Magic, click the down arrow, select the image from the list, and then click **OK**.
      - To use your own image, click **New**. In the **Open** dialog box, select the image you want to use, click **Open**, and then click **OK**.
5. On the right pane, select the image you want to use for the setup image. Forms Magic lists the best image first.
6. (Optional) If you have classifications that are very similar, you can select specific words that are required for classification of this form by performing the following subprocedure.
  1. Click **Required Words**, and then in the **Classification Words** list, do one of the following:
    - Double-click each word you want to require.
    - Select the word(s) you want to require (hold down the Ctrl key to select multiple items), and then click the right arrow.
    - To require all of the listed words, select the **Select All** check box, and then click the right arrow.
  2. (Optional) To remove words from the **Required Words** list, do one of the following:
    - In the **Required Words** list, double-click each item you want to remove.
    - In the **Required Words** list, select the item(s) you want to remove (hold down the Ctrl key to select multiple items), and then click the left arrow.
    - To remove all words, select the **Select All** check box, and then click the left arrow.
  3. Click **OK** to save your settings.

7. Click **Add Form** to save the form and move it to the **Existing Forms** tab.
8. Do one of the following:
  - Repeat this procedure until you have created all the forms and form types that you need.
  - Click the **Existing Forms** tab, select the form you want to work with, and then click **Open in Form Designer** to create index and detail field zones. (See "Form Designer Overview" on page 112 to access instructions for the tasks you can complete in the **Form Designer**.)

### To change the setup image for an existing form



#### NOTE

You can only replace the setup image with an image of the same resolution. Attempting to use an image with a different resolution will result in an error, and the operation will be canceled.

1. From the **Forms Magic Designer**, click **View Clusters** to open the **Clustering Results - Batch Documents** window. (See "Cluster Documents" on page 101 if you need help clustering documents.)
2. In the **Clustering Results** window, on the **Existing Forms** tab, select the form for which you want to change the setup image.  
 Thumbnails of the files in that cluster appear on the right pane, and a preview of any selected image appears on the middle pane.
3. On the right pane, select the image you want to use for the setup image. Forms Magic lists the best image first.
4. Click **Update Setup Image**, and then click **OK**.

### To open the Form Designer for an existing form

1. From the **Forms Magic Designer**, click **View Clusters** to open the **Clustering Results - Batch Documents** window. (See "Cluster Documents" on page 101 if you need help clustering documents.)
2. In the **Clustering Results** window, on the **Existing Forms** tab, select the form for which you want to open the **Form Designer**.
3. Click **Form Designer**.

## Manage Forms

In Forms Magic, you categorize forms by form type. You can then manage all the form types for a project, and the forms within each form type. You can then select an individual form to use to configure indexes. Here is an overview of how you can complete these tasks.

1. On the **Forms Magic Designer**, in the **Manage Forms** group, click **Form Management** to open the **Form Types** window.  
 See "Form Types" on the next page for instructions for the tasks you can perform on the Form Types window.
2. From the **Form Types** window, you can open the **Forms** window to manage all the forms within that form type.

See "Forms" on page 107 for instructions for the tasks you can perform on the **Forms** window.

3. From the **Forms** window, you can select an individual form to configure indexes in the **Form Designer**.

See "Forms Designer Step Overview" on page 94 to access instructions for the tasks you can perform in the Form Designer.

## Form Types

In Forms Magic, you categorize forms by form type. You can sort form types, change their appearance, and create new form types. You can add and remove indexes and detail fields that are common to all forms within that form type. You can also rename and delete form types. You perform these tasks in the **Form Types** window. See the following procedure for instructions to open this window.



### I M P O R T A N T

Any operations you perform at the form-type level, will apply to all forms within that type. For example, if you delete a form type, all forms within that form type will also be deleted.

---

### To open the Form Types window

- From the **Forms Magic Designer**. In the **Manage Forms** group, click **Form Management** to open the **Form Types** window.

The **Form Types** window lists all the form types in the project with information about each type, including the number of index fields, detail fields, and the number of forms.

### To sort form types

1. Open the **Form Types** window. (See "To open the Form Types window" above if you need help.)
2. On the toolbar, click one of the following:
  - **Sort by Name** - displays the form types in alphabetical order. Click the command again to reverse the order.
  - **Sort by Last Accessed** - displays the form types in the order in which they have been accessed. Click the command again to reverse the order.
  - **Sort by Most Accessed** - displays the form types based on how often they have been accessed. Click the command again to reverse the order.

### To create a new form type

1. Open the **Form Types** window. (See "To open the Form Types window" above if you need help.)
2. On the toolbar, click **New Form-Type**.
3. In the **Form-Type** box, type a name for the new form type.
4. To assign an image to the new form type, do one of the following:
  - To use an image provided by Forms Magic, click the down arrow, select the image from the list, and then click **OK**.
  - To use your own image, click **New**. In the **Open** dialog box, select the image (.tif, .jpg, .bmp, or .png) you want to use, click **Open**, and then click **OK**.


### To view forms within a form type

1. Open the **Form Types** window. (See "To open the Form Types window" above if you need help.)



2. On the right pane, do one of the following:
  - Double-click the form type you want to open.
  - Select the form type, and then on the toolbar, click **Show Forms of Selected Form-Type**.

### To change the appearance of the form types list

1. Open the **Form Types** window. (See "To open the Form Types window" on the previous page if you need help.)
2. On the toolbar, click , and then choose one of the following:
  - Click **Icons** to display only the icon for each form type.
  - Click **Details** to display only the details (name, fields, detail fields and the number of forms) for each form type.
  - Click **Icons + Details** to display the icon and details for each form type.

### To rename a form type

1. Open the **Form Types** window. (See "To open the Form Types window" on the previous page if you need help.)
2. On the right pane, select the form type you want to rename.
3. On the **Form-Type Info** pane, click **Rename**.
4. In the **Name** box, type the new name, and then click **OK**.

### To delete a form type



#### I M P O R T A N T

Deleting a form type also deletes all of the forms in that type.

---

1. Open the **Form Types** window. (See "To open the Form Types window" on the previous page if you need help.)
2. On the right pane, select the form type you want to delete.
3. On the **Form-Type Info** pane, click **Delete**.
4. Click **Yes** to confirm the deletion.

### To add an index at the form-type level



#### N O T E

Adding indexes at the form-type level makes them available for all forms in that type.

---

1. Open the **Form Types** window. (See "To open the Form Types window" on the previous page if you need help.)
2. On the right pane, select the form type to which you want to add an index.
3. On the **Indexes** pane, click **Add**.
4. In the **Name** box, type the index name, and then click **OK**.

### To remove an index at the form-type level



#### IMPORTANT

Removing indexes at the form-type level removes them from all forms in that type.

1. Open the **Form Types** window. (See "To open the Form Types window" on page 104 if you need help.)
2. On the right pane, select the form type from which you want to remove an index.
3. On the **Indexes** pane, select the index you want to remove, and then click **Remove**.

### To rename an index at the form-type level



#### NOTE

Renaming indexes at the form-type level renames them from all forms in that type.

1. Open the **Form Types** window. (See "To open the Form Types window" on page 104 if you need help.)
2. On the right pane, select the form type for which you want to rename an index.
3. On the **Indexes** pane, select the index you want to rename, and then click **Rename**.
4. In the **Name** box, type the new index name, and then click **OK**.

### To add a detail field at the form-type level



#### NOTE

Forms Magic supports only one detail field type. Therefore, if that detail field is defined at the form-type level, all forms within that type will share the same detail field, and you cannot create a detail field specific to a form in that form type. If a detail field exists at the form level, you will not be able to add a form-type detail field.

1. Open the **Form Types** window. (See "To open the Form Types window" on page 104 if you need help.)
2. On the right pane, select the form type to which you want to add a detail field.
3. On the **Detail Fields** pane, click **Add**.
4. In the **Name** box, type the detail field name, and then click **OK**.

### To remove a detail field at the form-type level



#### IMPORTANT

Removing a detail field at the form-type level removes it from all forms in that type.

1. Open the **Form Types** window. (See "To open the Form Types window" on page 104 if you need help.)
2. On the right pane, select the form type to which you want to add a detail field.
3. On the **Detail Fields** pane, select the detail field you want to remove, and then click **Remove**.

## To rename a detail field at the form-type level



### NOTE

Renaming a detail field at the form-type level renames it for all forms in that type.

1. Open the **Form Types** window. (See "To open the Form Types window" on page 104 if you need help.)
2. On the right pane, select the form type to which you want to add a detail field.
3. On the **Detail Fields** pane, select the detail field you want to rename, and then click **Rename**.
4. In the **Name** box, type the new detail field name, and then click **OK**.

## Forms

Forms are created when you add a form in the **Clustering Results - Batch Documents** window (See Clustering Results for more information), or the Single Document View window ( See "Single Document View" on page 98 for more information). On the **Forms** window, you can do the following:

- Sort forms
- Change the appearance of forms
- Create new forms
- Add indexes and detail fields to individual forms and all forms in that form type
- Remove indexes and detail fields from individual forms and all forms in that form type
- Rename forms
- Delete forms
- Change form types
- Specify document breaks



### NOTE

With the exception of adding and deleting indexes and detail fields (which you can do at the form- and form-type level), all other operations you perform on the **Forms** window apply only to the selected form.

## To open the Forms window

1. From the **Forms Magic Designer**. In the **Manage Forms** group, click **Form Management** to open the **Forms Types** window.

The **Form Types** window lists all the form types in the project with information about each type, including the number of index fields, detail fields, and the number of forms.

2. To access all forms within a form type, do one of the following:
  - Double-click the form type you want to open.
  - Select the form type you want to open, and then on the toolbar, click **Show Forms of Selected Form-Type**.

The **Forms** window lists all the forms within the form type you selected.

### To sort forms

1. Open the **Forms** window. (See "To open the Forms window" on the previous page if you need help.)
2. On the toolbar, click one of the following:
  - **Sort By Name** - displays the forms in alphabetical order. Click the command again to reverse the order.
  - **Sort By Last Used** - displays the forms in the order in which they have been accessed. Click the command again to reverse the order.
  - **Sort By Favorite** - displays the forms based on how often they have been accessed. Click the command again to reverse the order.

### To open the Form Designer

1. Open the **Forms** window. (See "To open the Forms window" on the previous page if you need help.)
2. Do one of the following:
  - Double-click the form you want to configure.
  - Select the form you want to configure, and then on the toolbar, click **Open Form Designer**.
3. See Form Designer for information about the tasks you can perform in the **Form Designer**.

### To create a new form

1. Open the **Forms** window. (See "To open the Forms window" on the previous page if you need help.)
2. On the toolbar, click **Create New Form** to open the **Clustering - Specify Input Documents** window.
3. See "Cluster Documents" on page 101 for instructions to classify documents.
4. See To create a new form for instructions to create a new form based on the results of the classification.

### To change the appearance of the forms list

1. Open the **Forms** window. (See "To open the Forms window" on the previous page if you need help.)
2. On the toolbar, click **Change View**, and then choose one of the following:
  - Click **Icons** to display only the icon for each form type.
  - Click **Details** to display only the details (form name, form type, the number of form-type indexes, the number of form indexes, and detail set information) for each form.
  - Click **Icons + Details** to display the icon and details for each form.

### To rename a form

1. Open the **Forms** window. (See "To open the Forms window" on the previous page if you need help.)
2. On the right pane, select the form you want to rename.
3. On the **Form Info** pane, click **Rename**.
4. In the **Name** box, type the new name, and then click **OK**.

### To delete a form

1. Open the **Forms** window. (See "To open the Forms window" on page 107 if you need help.)
2. On the right pane, select the form you want to delete.
3. On the **Form Info** pane, click **Delete**.
4. Click **Yes** to confirm the deletion.

### To change a form type



#### NOTE

When changing form types, existing form-type fields are discarded, and form-type fields from the new form type are applied. Form-level fields and attributes (anchors, color dropouts, etc.) are retained.

1. Open the **Forms** window. (See "To open the Forms window" on page 107 if you need help.)
2. On the right pane, select the form for which you want to change the form type.
3. On the **Form Info** pane, click **Change Form-Type**.
4. Select the new form type from the list.
5. Click **OK** to confirm your selection.

### To specify document breaks

1. Open the **Forms** window. (See "To open the Forms window" on page 107 if you need help.)
2. On the right pane, select the form for which you want to specify document breaks.
3. On the **Form Info** pane, click the **Document Breaks** link, and then do one of the following:
  - To use the number of setup pages to determine the number of pages in the classified document, select **Automatic**.
  - To specify the number of pages in the classified document, select **Fixed**, and then in the **Number of Pages** box, type or select the number of pages you want the classified document to have.
  - To specify a range of pages for the classified document, select **Variable**, and then in the **Number of Pages** boxes, type or select the minimum and maximum number of pages you want the classified document to have. If one of the pages within the specified page range classifies against a form, it will break the document on that page. If none of the pages in that page range can classify against an existing form, it will break the document at the maximum number of pages you specified. Optionally, if you select **Auto Terminate**, Forms Magic will look in the page range you specified for the last setup page in the form, and break the document on that page. If none of the pages match the last setup page, it will break the document on the maximum number of pages you specified.



#### NOTE

When selecting **Variable**, the default page range is 1-2. When selecting **Auto-Terminate**, the default page range is 2-3.

4. Click **OK** to save your settings.

### To specify required words



#### NOTE

If you have classifications that are very similar, you can select specific words that are required for classification of this form by performing the following procedure.

1. Open the **Forms** window. (See "To open the Forms window" on page 107 if you need help.)
2. On the right pane, select the form for which you want to specify required words.
3. On the **Form Info** pane, click the **Required Words** link.
4. In the **Classification Words** list, do one of the following:
  - Double-click each word you want to require.
  - Select the word(s) you want to require (hold down the Ctrl key to select multiple items), and then click the right arrow.
  - To require all of the listed words, select the **Select All** check box, and then click the right arrow.
5. (Optional) To remove words from the **Required Words** list, do one of the following:
  - In the **Required Words** list, double-click each item you want to remove.
  - In the **Required Words** list, select the item(s) you want to remove (hold down the Ctrl key to select multiple items), and then click the left arrow.
  - To remove all words, select the **Select All** check box, and then click the left arrow.
6. Click **OK** to save your settings.

### To add an index at the form level



#### NOTE

Adding indexes at the form level makes them specific to that form.

1. Open the **Forms** window. (See "To open the Forms window" on page 107 if you need help.)
2. On the right pane, select the form for which you want to add an index.
3. On the **Indexes** pane, click **Add –**.
4. In the **Name** box, type the index name, and then click **OK**.

### To add an index at the form-type level



#### NOTE

Adding indexes at the form-type level makes them available for all forms in that type.

1. Open the **Forms** window. (See "To open the Forms window" on page 107 if you need help.)
2. On the right pane, select the form for which you want to add an index at the form-type level.
3. On the **Indexes** pane, click **Add ≡**.
4. In the **Name** box, type the index name, and then click **OK**.

## To remove an index



### IMPORTANT

Indexes that apply to the form type appear with multiple horizontal lines (≡) in front of them. Removing an index at the form-type level removes it from all forms in that type.

1. Open the **Forms** window. (See "To open the Forms window" on page 107 if you need help.)
2. On the right pane, select the form from which you want to remove an index.
3. On the **Indexes** pane, select the index you want to remove, and then click **Remove**.

## To rename an index



### NOTE

Indexes that apply to the form type appear with multiple horizontal lines (≡) in front of them. Renaming an index at the form-type level renames it in all forms in that type.

1. Open the **Forms** window. (See "To open the Forms window" on page 107 if you need help.)
2. On the right pane, select the form on which you want to rename an index.
3. On the **Indexes** pane, select the index you want to rename, and then click **Rename**.
4. In the **Name** box, type the new index name, and then click **OK**.

## To add a detail field at the form level



### NOTE

Forms Magic supports only one detail field. Therefore, if that detail field is defined at the form-type level, all forms within that type will share the same detail field, and you cannot create a detail field specific to a form in that form type. If a detail field exists at the form level, you will not be able to add a form-type detail field.

1. Open the **Forms** window. (See "To open the Forms window" on page 107 if you need help.)
2. On the right pane, select the form for which you want to add a detail field.
3. On the **Detail Fields** pane, click **Add –**.
4. In the **Name** box, type the index name, and then click **OK**.

## To add a detail field at the form-type level



### NOTE

Forms Magic supports only one detail field type. Therefore, if that detail field is defined at the form-type level, all forms within that type will share the same detail field, and you cannot create a detail field specific to a form in that form type. If a detail field exists at the form level, you will not be able to add a form-type detail field.

1. Open the **Forms** window. (See "To open the Forms window" on page 107 if you need help.)
2. On the right pane, select the form for which you want to add a detail field.

3. On the **Detail Fields** pane, click **Add** ≡.
4. In the **Name** box, type the index name, and then click **OK**.

### To remove a detail field



#### I M P O R T A N T

A detail field that applies to the form type appears with multiple horizontal lines (≡) in front of it. Removing a detail field at the form-type level removes it from all forms in that type.

1. Open the **Forms** window. (See "To open the Forms window" on page 107 if you need help.)
2. On the right pane, select the form from which you want to remove a detail field.
3. On the **Detail Fields** pane, select the detail field you want to remove, and then click **Remove**.

### To rename a detail field



#### N O T E

A detail field that applies to the form type appears with multiple horizontal lines (≡) in front of it. Renaming a detail field at the form-type level renames it in all forms in that type.

1. Open the **Forms** window. (See "To open the Forms window" on page 107 if you need help.)
2. On the right pane, select the form on which you want to rename a detail field.
3. On the **Detail Fields** pane, select the detail field you want to rename, and then click **Rename**.
4. In the **Name** box, type the new detail field name, and then click **OK**.

## Form Designer Overview

After your documents have been classified (see "Cluster Documents" on page 101 for instructions), and you have named the form you are working with and assigned it to a form type (see To create a new form for instructions), the next step is opening the form in the **Form Designer** so that you can configure indexes, detail fields, anchors, extraction zones, and assign color dropout filters.

If you already have a form open in the **Form Designer**, see the following sections for instructions about the tasks you can perform.

- See "Configure Form Pages" on the facing page for instructions to complete these tasks.
- See "Configure Indexes" on the facing page for instructions to complete this task.
- See "Configure Detail Fields" on page 115 for instructions to complete this task.
- See "Configure Anchors" on page 116 for instructions to complete this task.
- See "Attach Anchors to Indexes" on page 117 for instructions to complete this task.
- See "Attach Anchors to Detail Fields" on page 119 for instructions to complete this task.

You can open the **Form Designer** from several locations in Forms Magic as describe below.

- **Single Document View** window. (See "Single Document View" on page 98 for more information.)




- **Clustering Results - Batch Documents** window. ( See "View Clusters" on page 101 for more information.)
- **Forms** window. (See "Forms" on page 107 for more information.)

### To take control of a locked form



#### NOTE

Opening a form locks it to other users. Locked forms appear with the  indicator in the preview window when you open them. To make any changes to a locked form, you must first take control of it

1. Click **Unlock**, and then click **Yes**.
2. Click **OK**.

The owner of the original lock is notified that you have taken control of the form.

## Configure Form Pages

On the **Form Designer**, you can remove and reorder form pages on the **Pages** pane. You can only add a form page from the **Single Document View** window. (See "To add a form page" on page 99 for more information.)

### To remove a page



#### NOTE

You cannot remove a setup image. (See "To replace the setup image" on page 100 for information on replacing a setup image.)

1. Open the **Form Designer**. (See "Form Designer Overview" on the previous page if you need help.)
2. On the **Pages** pane, select the form page you want to remove.
3. On the toolbar of the **Pages** pane, click **Remove Image**.
4. Click **Yes** to confirm the removal.

### To reorder a page

1. Open the **Form Designer**. (See "Form Designer Overview" on the previous page if you need help.)
2. On the **Pages** pane, select the page you want to move, and then click **Move Image Up** or **Move Image Down**.

## Configure Indexes

You must configure indexes so that Forms Magic can extract the data you need. You can specify where on the form the data resides and how to extract it. You may need to use anchors and color dropout filters to aid in extraction.

### To configure an index

1. Open the **Form Designer**. (See "Form Designer Overview" on page 112 if you need help.)
2. On the **Indexes** pane, do one of the following:
  - Select the index you want to configure.
  - To add a new index to the form, in the **Index** group, click **Add Form Index**, type the index name, and then click **OK**.
  - To add a new index to all the forms in the form type, in the **Index** group, click **Add Form-Type Index**, type the index name, and then click **OK**.
4. In the **Zone** group, click **Add Zone**.
5. Position the pointer where you want to draw the zone, and then click and drag the pointer to draw a border around the area where you want Forms Magic to extract the index value.

Any value extracted from the zone appears in the **Zone Text** window below the setup image or page.
6. (Optional) To move an index zone, select it, and then rest the mouse on the center of the zone until the cursor turns into a four-sided arrow. Click the zone and drag it to the desired location.
7. (Optional) To size an index zone, select it, and then drag the sizing handle(s).
8. (Optional) To remove an index zone, select it, and then in the **Zone** group, click **Remove Zone**.
9. To specify how content must fall within the defined zone to be extracted, in the **Index** group, click **Zone Extraction Type**, and then select one of the following:
  - **Top Left** - Select this option to specify that the top-left corner of the content must fall within the zone to be extracted. This is the default value.
  - **Overlap** - Select this option to specify that if any part of the content falls within the zone it will be extracted.
10. (Optional) To attach an anchor to the index, in the **Anchor** group, click **Attach Anchor**, select the anchor, and then click **OK**. (See "Configure Anchors" on page 116 for instructions to create an anchor.)
11. (Optional) To apply a color dropout filter to the index, in the **Dropout** group, click **Color Dropout**, select the filter, and then click **OK**. (See "Color Dropout Filters" on page 121 for instructions to create and edit dropout filters.) To apply the filter to all indexes (excluding detail fields), select the **Apply to All Fields** check box. To remove a color dropout filter, select **(None)**, and then click **OK**.
12. (Optional) To remove an index, in the **Index** group, click **Remove Index**.
13. (Optional) To rename an index, select the index, in the **Index** group, click **Rename Index**, type the new index name, and then click **OK**.



#### T I P

On the **Indexes** pane, you can click a configured index, and it will appear on the setup image in the preview pane. You can also rest the pointer on an index to view configuration information.

---

14. Repeat this procedure until you have configured all of the indexes you need.

## Configure Detail Fields

Forms Magic supports only one detail set type. Therefore, if that detail set is defined at the form-type level, all forms within that type will share the same detail fields, and you cannot create detail fields specific to that form.

### To configure a detail field

1. Open the **Form Designer**. (See "Form Designer Overview" on page 112 if you need help.)
2. On the **Detail Fields** pane, do one of the following:
  - Select the detail field you want to configure.
  - To add a new detail field to the form, in the **Field** group, click **Add Form Detail Field**, type the detail field name, and then click **OK**.
  - To add a new detail field to all the forms in the form type, in the **Field** group, click **Add Form-Type Detail Field**, type the detail field name, and then click **OK**.
4. In the **Zone** group, click **Add Zone**.
5. Position the pointer where you want to draw the zone, and then click and drag the pointer to draw a border around the area where you want Forms Magic to extract the detail field value.  
Any value extracted from the zone appears in the **Zone Text** window below the setup image or page.
6. (Optional) To move a detail field zone, select it, and then rest the mouse on the center of the zone until the cursor turns into a four-sided arrow. Click the zone and drag it to the desired location.
7. (Optional) To size a detail field zone, select it, and then drag the sizing handle(s).
8. (Optional) To remove a detail field zone, select it, and then in the **Zone** group, click **Remove Zone**.
9. (Optional) To specify that the detail field is the first detail field in the line item, in the **Field** group, click **Set As Primary Field**.



#### T I P

Using the **Set as Primary Field** option is helpful when the detail field spans more than one line. Setting the first detail field in the line item to a primary field causes Forms Magic to begin a new line item in the detail set whenever it encounters a primary field.

---

10. (Optional) To remove the primary field setting, select the detail field, and then in the **Field** group, click **Clear As Primary Field**.
11. (Optional) To attach anchors to the detail set, in the **Anchor** group, click **Detail Set**, and then do one of the following:
  - If all the detail fields are on one page, in the **Detail Set Zone** area, click **Attach**, select the anchor, and then click **OK**. (See "Configure Anchors" on the next page for instructions to create and edit anchors. See "Attach Anchors to Detail Fields" on page 119 for more information about using this option.)
  - If the detail fields span more than one page, in the **Header** area, click **Attach**, select the anchor, and then click **OK**. Repeat this step to attach the **Break Footer**, **Break Header**, and

**Footer.** (See "Configure Anchors" below for instructions to create and edit anchors. See **Attach Anchors to Detail Fields** for more information about using this feature.)

12. (Optional) To apply a color dropout filter to the detail set, in the **Dropout** group, click **Detail Set**, select the filter, and then click **OK**. (See **Color Dropout Filters** for instructions to create and edit dropout filters.) To remove a color dropout filter, select **(None)**, and then click **OK**.
13. (Optional) To remove a detail field, in the **Field** group, click **Remove Detail Field**.
14. (Optional) To rename a detail field, select the detail field, in the **Field** group, click **Rename Detail Field**, type the new name, and then click **OK**.



#### T I P

On the **Detail Fields** pane, you can click a configured detail field, and it will appear on the setup image in the preview pane. You can also rest the pointer on a detail field to view configuration information.

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15. Repeat this procedure until you have configured all of the detail fields you need.

## Configure Anchors

An anchor is a zone drawn to include at least two words. Forms Magic will search for those words, and then superimpose the zone you have drawn. Anchors are used to aid in the extraction of information that is not always located in the same place on a form, but is always located in the same place relative to specific words on a form. They are also used to extract information that is repeated on a form. Depending on how you have applied the anchor to an index field or detail field, Forms Magic will then extract information from the anchor zone, or from a zone that is tied to that anchor. You can also use anchors to stop and start looking for index information. Configure the anchors you need, and then they will be available to apply to index fields and detail fields. (See "Attach Anchors to Indexes" on the facing page and "Attach Anchors to Detail Fields" on page 119 for more information.)

### To configure an anchor

1. Open the **Form Designer**. (See "Form Designer Overview" on page 112 if you need help.)
2. On the **Anchors** pane, click **Add Anchor**.
3. Type the anchor name, and then click **Draw Zone**.
4. Position the pointer where you want to draw the zone, and then click and drag the pointer to draw a border around the area where you want Forms Magic to extract data and place the anchor.  
  
Any value extracted from the anchor zone appears in the **Zone Text** window below the setup image or page.
6. (Optional) To move an anchor, select it, and then rest the mouse on the center of the anchor until the cursor turns into a four-sided arrow. Click the anchor and drag it to the desired location.
7. (Optional) To size an anchor, select it, and then drag the sizing handle(s).
8. (Optional) To remove an anchor, select it, and then on the **Anchors** pane, click **Remove Anchor**.
9. (Optional) To rename an anchor, select it, and then on the **Anchors** pane, click **Rename Anchor**, type the new name, and then click **OK**.

10. (Optional) To apply a color dropout filter to the anchor, select it, and then on the **Anchors** pane, click **Color Dropout**, select the filter, and then click **OK**. (See "Color Dropout Filters" on page 121 for instructions to create and edit dropout filters.) To remove a color dropout filter, select **(None)**, and then click **OK**.
11. (Optional) To change the number of words needed to recognize the anchor, select it, and then on the **Anchors** pane, click **Required Matches**. Type or select the number of words needed to recognize the anchor, and then click **OK**.

**T I P**

On the **Anchors** pane, you can click a configured anchor, and it will appear on the setup image in the preview pane. You can also rest the pointer on an anchor to view configuration information.

---

12. Repeat this procedure until you have configured all of the anchors you need.
13. After you have defined anchors, you can attach them to indexes and detail fields. (See "Attach Anchors to Indexes" below and "Attach Anchors to Detail Fields" on page 119 for more information.)

## Attach Anchors to Indexes

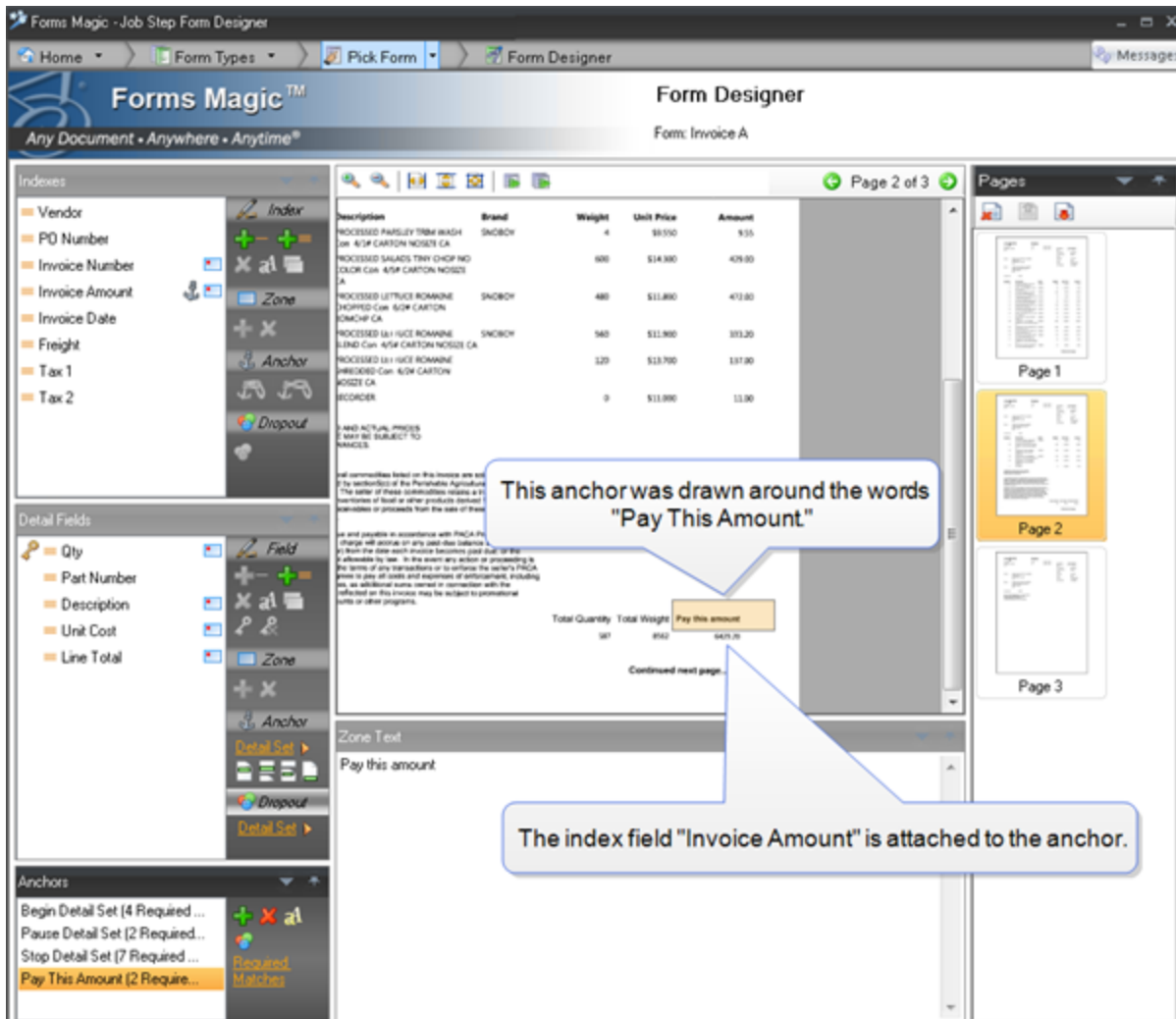
Before you can attach an anchor to an index, you must create it first. See "Configure Anchors" on the previous page for instructions to create anchors. Attaching an anchor to an index is useful when the index value is not always located on the same place on a form, but is always located next to a certain word.

### EXAMPLE

If the index "Invoice Amount" appears after the last line item, its location will vary depending on the number of line items on the invoice. If you draw an anchor around the words "Pay This Amount," and then attach it the "Invoice Amount" index, Forms Magic searches for the words "Pay This Amount," applies the anchor, and then applies the index zone relative to the position of the anchor, and then extracts the data.

Any place Forms Magic finds the words "Pay This Amount," it will apply the anchor, and then place the index zone in the position you have drawn it relative to the anchor, not the page.

The following screen shot illustrates the preceding example. In the **Indexes** pane, the anchor icon appears next to the **Invoice Amount** index to indicate that an anchor is attached. See "To attach an anchor to an index" on the next page for instructions.



### To attach an anchor to an index

1. Open the **Form Designer**. (See "Form Designer Overview" on page 112 if you need help.)
2. On the **Indexes** pane, select the index to which you want to attach an anchor.
3. In the **Anchor** group, click **Attach Anchor**, select the anchor, and then click **OK**. (See "Configure Anchors" on page 116 for instructions to create and edit anchors.)



#### TIP

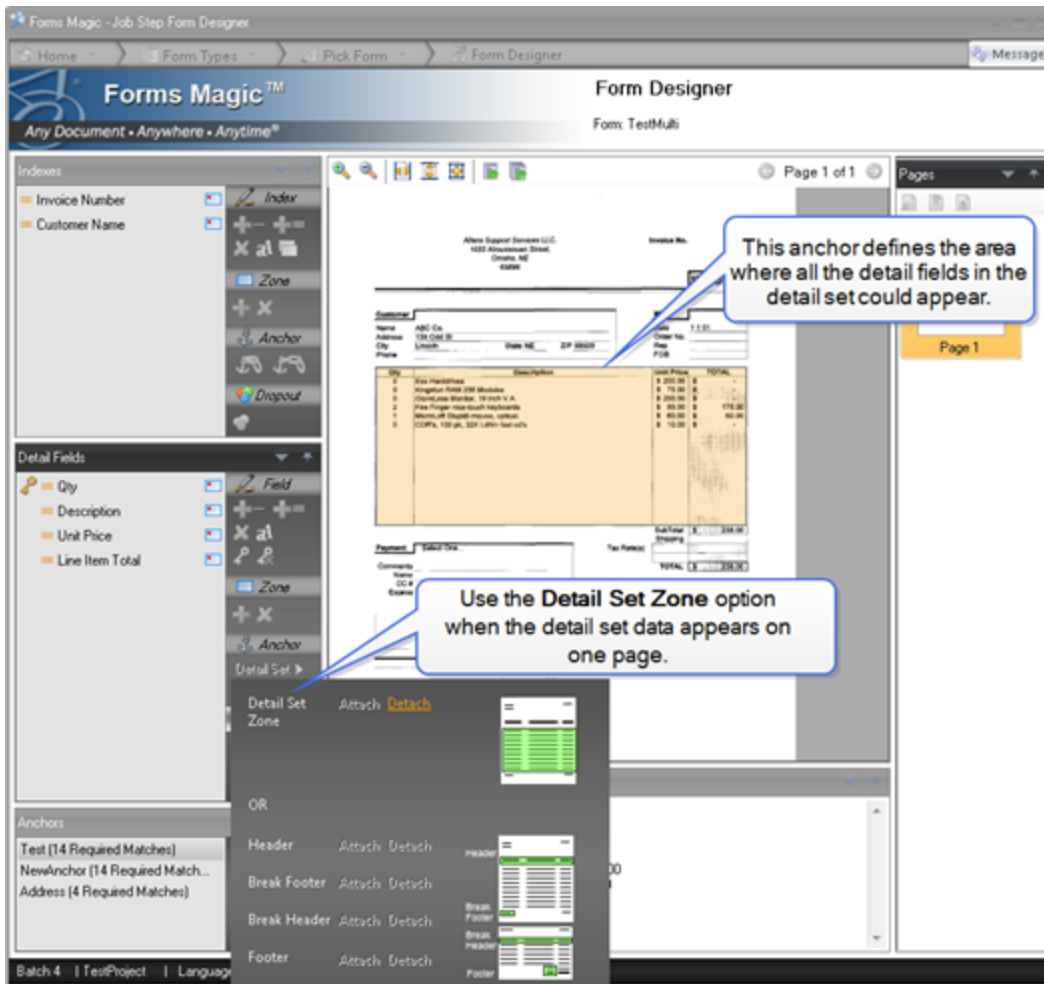
On the **Anchors** pane, you can click a configured anchor, and it will appear on the setup image in the preview pane. You can also rest the pointer on an anchor to view configuration information.

## Attach Anchors to Detail Fields

Before you can attach an anchor to detail fields, you must create it first. See "Configure Anchors" on page 116 for instructions to create anchors. The two options available for using anchors with detail fields are described in the following sections.

### Zone Anchor

If the detail fields are contained on a single page, you can extract detail fields from within a zone as shown on the following graphic.



### To attach a zone anchor to detail fields

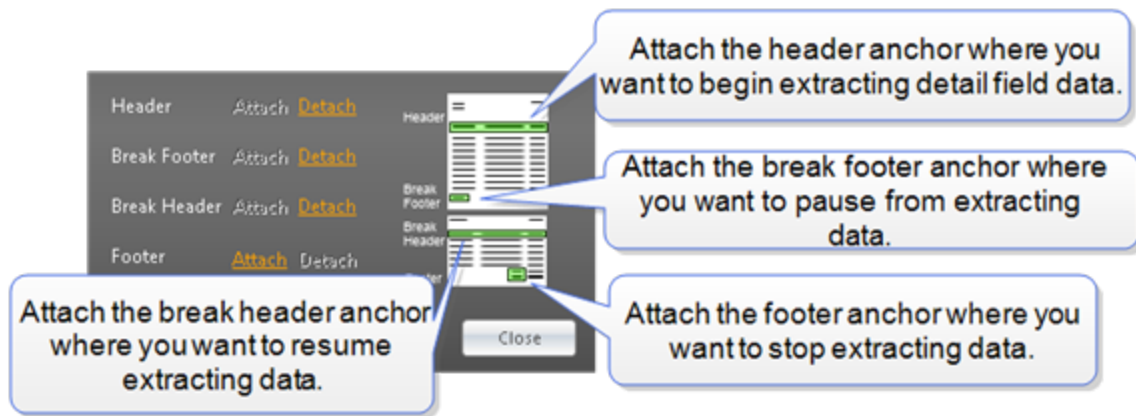
1. Open the **Form Designer**. (See "Form Designer Overview" on page 112 if you need help.)
2. On the **Detail Fields** pane, in the **Anchor** group, click **Detail Set**.
3. Next to **Detail Set Zone**, click **Attach**, select the anchor, and then click **OK**. (See "Configure Anchors" on page 116 for instructions to create and edit anchors.)

**T I P**

On the **Anchors** pane, you can click a configured anchor, and it will appear on the setup image in the preview pane. You can also rest the pointer on an anchor to view configuration information.

## Header and Footer Anchors

If the detail fields span more than one page, you can use anchors so that Forms Magic will start extracting detail fields at a header anchor, stop extracting at a break footer anchor, begin again at a break header anchor, and then stop completely at the footer anchor.



### To attach header and footer anchors to detail fields

1. Open the **Form Designer**. (See "Form Designer Overview" on page 112 if you need help.)
2. On the **Detail Fields** pane, in the **Anchor** group, click **Detail Set**.
3. Next to the header or footer anchor you want to attach, click **Attach**, select the anchor, and then click **OK**. (See "Configure Anchors" on page 116 for instructions to create and edit anchors.)
4. Repeat steps 3 and 4 for each header and footer anchor.

**T I P**

On the **Anchors** pane, you can click a configured anchor, and it will appear on the setup image in the preview pane. You can also rest the pointer on an anchor to view configuration information.

## Batch Processing

Processing a batch classifies all the documents in the batch and extracts data for use in other job steps. You can process a batch from the **Forms Magic Designer**, and from the **Single Document View** window (see "Single Document View" on page 98 for more information). If you have added new forms or made changes to existing forms, you can clear all classifications so that you can process the batch again.



### To process a batch

1. From the **Forms Magic Designer**, in the **Batch Processing** group, click **Process Batch**.
2. Click **OK** to begin processing the batch.

### To clear all classifications

1. From the **Forms Magic Designer**, in the **Batch Processing** group, click **Clear All Classifications**.
2. Click **Yes** to clear all classifications.

## Color Dropout Filters

In Forms Magic, you can create custom color filters that replace colors in your image with colors you specify. By default, the filter replaces the color you select with white. You can apply these filters to images and zones to aid in data extraction. The filters you create will then be available to apply to zones when you configure a form, and in some Capture job steps.



#### NOTE

Only configure color dropout filters when all forms are unlocked. Unlocking forms from the **Color Dropout Filters** window may cause other users to lose their changes.

---

### To create a color dropout filter

1. On the **Forms Magic Designer**, In the **Color Dropout Filters** group, click **Click to Configure** to open the **Color Dropout Filters** window.
2. If necessary, click **Unlock**.
3. Click **New**.
4. Type the name of the new filter, and then click **OK**.
5. Click **Open Image** to access the **Open** dialog box. Locate and select the image you want to use to create the filter, and then click **Open**.

Two versions of the image you selected appear on the right pane. You can use the options on the tool bar to alter both images. (See "Common Functions" on page 96 for more information.)

6. (Optional) By default, the colors you select are replaced with white. To select a different replacement color, on the **Color Dropout Component** pane, click **Replacement**, and then do one of the following:
  - Under **Basic colors**, select the color you want to use, and then click **OK**.
  - Click **Define Custom Colors**, select or define the color you want to use, and then click **Add to Custom Colors**.
7. On the left image, click the color you want to replace.



#### TIP

Zooming in on the image makes it easier to select colors.

---

The color you clicked is removed from the image on the right, and a color dropout component is added to the filter. Each time you click on the left image, you add a component to the color filter.

8. (Optional) To remove a specific color dropout component, on the Color Dropout Components pane, select the color, and then click **Remove Color Component**.
9. (Optional) To remove all the color dropout components, on the Color Dropout Components pane, click **Clear All**.
10. Click **Done** to save the color dropout filter.

### To edit a color dropout filter

1. On the **Forms Magic Designer**, in the **Color Dropout Filters** group, click **Click to Configure** to open the **Color Dropout Filters** window.
2. If necessary, click **Unlock**.
3. From the **Color Dropout** list, select the filter you want to edit.
4. Click **Edit**.
5. See "To create a color dropout filter" on the previous page if you need help opening an image and adding color dropout components.
6. After you are finished editing the filter, click **Done** to save the color dropout filter.

### To rename a color dropout filter

1. On the **Forms Magic Designer**, in the **Color Dropout Filters** group, click **Click to Configure** to open the **Color Dropout Filters** window.
2. If necessary, click **Unlock**.
3. From the **Color Dropout** list, select the filter you want to rename.
4. Click **Rename**.
5. Type the new name for the filter, and then click **OK**.

### To delete a color dropout filter

1. On the **Forms Magic Designer**, in the **Color Dropout Filters** group, click **Click to Configure** to open the **Color Dropout Filters** window.
2. If necessary, click **Unlock**.
3. From the **Color Dropout** list, select the filter you want to delete.
4. Click **Delete**.
5. Click **Yes** to confirm the deletion.

## User Preferences

In Forms Magic, you can set user preferences to specify when MVX files are created, to apply color drop out filters to forms while testing classification, to highlight classification words, to highlight extractions zones and text, and to display confidence indicators for extracted text. From the User Preferences window, you can also return to the **Single Document View** window, or the **Cluster Documents** window.

### To set user preferences

1. On the **Forms Magic Designer**, in the **User Preferences** group, click **Click to Configure** to open the **User Preferences** window. You can specify the following options.
  - **Process All Documents (Including those already classified)** - Select this option if you want to process every document, including those previously classified, when processing a batch.
  - **Only Process the First N Number of pages from Each Document** - Select this option if you want to limit the number of pages Forms Magic processes in each document, and then type the number of pages you want processed. The default setting is one page.
  - **Auto Break Documents** - Select this option if you want Forms Magic to classify every page in a document, and insert a document break every time a form is identified. Select **Auto Carry Indexes to New Documents** if you want Forms Magic to copy index values from the current document to the new document.
  - **Use Existing MVX** - If you want to skip the OCR process for files that already have MVX data, select the **Use Existing MVX** check box.
  - **Classification Color Dropout Filters** - With this option you can test color dropout filters that you apply to forms during the classification process. These filters are used only for classification, and do not impact color dropout filters applied to zones. (See "Color Dropout Filters" on page 121 if you need help creating a color dropout filter.)
    1. From the **Available** list, select the color drop out filter you want to apply by doing one of the following:
      - Double-click each filter you want to use.
      - Select the filter(s) you want to use (hold down the Ctrl key to select multiple items), and then click the right arrow.
      - To select all filters, select the **Select All** check box, and then click the right arrow.
    2. (Optional) To remove items from the **Members** list, do one of the following:
      - In the **Members** list, double-click each item you want to remove.
      - In the **Members** list, select the item(s) you want to remove (hold down the Ctrl key to select multiple items), and then click the left arrow.
      - To remove all items, select the **Select All** check box, and then click the left arrow.
- **Thumbnail** - Select this option if you want a classified watermark displayed on classified documents in thumbnail views.
- **Main Image** - Select this option if you want a classified watermark displayed on classified documents in single image views.
- **Hide Classified Documents** - Select this option if you only want unclassified documents displayed on the **Single Document View**, and when you cluster documents.
- **Highlight Classification Words** - Select this option if you want the words used to classify the document highlighted on the **Single Document View** window.
- **Highlight Extraction Zones** - Select this option if you want the extractions zones highlighted on the **Single Document View** window.

- **Highlight Extracted Text** - Select this option if you want the text extracted from a zone highlighted on the **Single Document View** window.
  - **Show Confidence Indicator** - Select this option if you want confidence indicators displayed for extracted text on the **Single Document View** window. Forms Magic confidence levels are set by your administrator.
3. Click **Apply** to save your settings, or **Reset** to apply the default settings.
  4. (Optional) Click **Single Document View** to return to the **Single Document View** window.
  5. (Optional) Click **Cluster Documents** to return to the **Clustering Input - Batch Documents** window.

# CHAPTER 9

## System Settings

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|                                     |     |
|-------------------------------------|-----|
| System Preferences Overview .....   | 126 |
| Scanner Settings .....              | 126 |
| Indexing Preferences .....          | 128 |
| Display Preferences .....           | 129 |
| System Preferences .....            | 131 |
| Import Preferences .....            | 133 |
| System Messages .....               | 133 |
| Keyboard Shortcuts (Hot Keys) ..... | 135 |
| Customize Toolbars .....            | 136 |



## System Preferences Overview

After you open a batch, you can set preferences that apply to system-level functions.

### To access system preferences

1. Open a batch.
2. From the job step window, click the **Tools** menu, and then click **Options**.
3. On the left pane of the dialog box, click the tab that has the preferences you want to set.

For information about the settings on each tab, see the following:

- See "Scanner Settings" below for information about customizing scanner settings specific to individual workstations.
- See "Indexing Preferences" on page 128 for information about customizing hand-key indexing settings specific to individual workstations.
- See "Display Preferences" on page 129 for information about defining the display of single- and multiple-page documents, bitonal image preference, and the color used to indicate document breaks.
- See "System Preferences" on page 131 for information about setting preferences for navigation and batch creation and assignment.
- See "Import Preferences" on page 133 for information about setting the default resolution and smoothing for importing pdf files.
- See "System Messages" on page 133 for information about specifying whether confirmation messages appear when specific operations are performed.
- See "Keyboard Shortcuts (Hot Keys)" on page 135 for information about customizing keyboard shortcuts.
- See "Customize Toolbars" on page 136 for information about adding new toolbars and customizing existing toolbar settings.

## Scanner Settings

If you are assigned to a Capture job step, you can configure scanner settings for your workstation. Black and white images are saved in an industry standard Group IV tiff file format, and color or grayscale images are saved in a standard jpg or bmp file format.

PaperVision Capture supports more than 300 ISIS-compatible scanners. If you need additional scanner drivers, please contact Digitech Systems' Technical Support at [support@digitechsystems.com](mailto:support@digitechsystems.com) or by phone at (877) 374-3569. If the driver is available, our support personnel will help you get it.

Alternatively, PaperVision Capture also supports the use of TWAIN scanners. The use of TWAIN scanners is generally intended for extremely low-volume scanners, as ISIS drivers are available for most scanners on the market.



#### NOTE

The items available for you to specify will vary depending on the selected device or driver. The following procedure describes all of the options, although some of them may not be available for you to specify.

---

### To specify scanner settings

1. On the job step window, click the **Tools** menu, and then click **Options**.
2. Click **Scanner Settings**.
3. In the **Saved Settings** list, do one of the following:
  - To apply settings that were previously saved, select the name of the settings.
  - To save new scanner settings, type the name for the settings, and then click **Apply**.  
To remove a setting, select it from the **Saved Settings** list, and then click **Delete**.
4. In the **Scanner Name** list, select a scanner.



#### N O T E

For a scanner to appear in the list, it must be installed and detected by PaperVision Capture. The **Properties** list provides various configuration items that differ based on the item selected in the **Scanner Name** list.

---

5. In the **Properties** list, you can select the following options:
  - **More Settings** may contain additional scanner settings that are available for configuration.
  - **About** displays the driver's version, copyright, and other information specific to the scanner.
  - **Area Settings** let you assign the scanning area.
  - **Extended Settings** may contain additional scanner settings that are available for configuration.
  - **Calibrate** lets you calibrate the scanner driver.
  - **Configure** lets you configure the scanner driver settings.
6. In the **Color Format** list (also known as the mode), you can select from options such as black and white, and color.
7. In the **Dither** list, you can apply dithering. Dithering converts and simulates unavailable colors. When dithering is turned on, the system combines two or more colors to approximate the unavailable color.
8. In the **Horizontal Resolution** list, you can select the horizontal dots-per-inch resolution setting to apply during the scanning process.
9. In the **Vertical Resolution** list, you can select the vertical dots-per-inch resolution setting to apply during the scanning process.
10. In the **Page Size** list, you can select the default page size of the image as it is scanned.
11. In the **Scan Type** list, you can select whether scanning should be two-sided (duplex), one-sided (simplex).
12. In the **Dual Stream** list, you can select how pages will be scanned (Front/Back, Front Only, Back Only). To disable dual stream scanning, select **None**.
13. In the **Brightness** area, you can set the brightness level to apply during the scanning process and whether it should be applied manually or automatically. Brightness defines a pixel's lightness value from black (darkest) to white (brightest). If you select **Manual** to apply the brightness level manually, use the slider to increase or decrease the amount of brightness.

14. In the **Contrast** area, you can set the contrast level to apply during the scanning process and whether it should be applied manually or automatically. Contrast is a measure of the rate of change of brightness in an image. A high-contrast image contains defined transitions from black to white. If you select **Manual** to apply the contrast level manually, use the slider to increase or decrease the amount of contrast.
15. Click **OK** to save your settings and close the dialog box.

## Indexing Preferences

If you are assigned to an Indexing job step, you can select how to move between documents and index fields. You can also specify these settings for hand-key indexing in the Capture or Manual QC job steps. You can also determine where the index verification process begins in the batch.

### To specify navigation between documents and index fields

1. On the job step window, click the **Tools** menu, and then click **Options**.
2. Click **Indexing Preferences**.
3. In the **General** area, you can select the following options:
  - **Save and Jump to Next Document with Blank Index Values** - Select this option to save the current index values and proceed to the next document that contains blank index values. When this option is selected, a message appears that notifies you when all documents have been indexed in the Capture or Indexing step.
  - **Enter Key Moves Between Index Fields** - Select this option to use the Enter key to move between index fields.
  - **Verify Skips Fields that “Ignore Indexing Errors”** - Select this option if you want the index verification process to skip fields that ignore an invalid index value .To set all options back to their default settings, click **Reset**.
4. Click **OK** to save your settings and close the dialog box.

### To specify where the index verification process begins

1. On the job step window, click the **Tools** menu, and then click **Options**.
2. Click **Indexing Preferences**.
3. In the **Verification Navigation** area, select one of the following options:
  - **Verify Starts at the Beginning of the Batch** - Select this option to start the index verification process at the beginning of a batch.
  - **Verify Starts from Current Document Forward** - Select this option to start the index verification process from the current document forward.
4. Click **OK** to save your settings and close the dialog box.

### To reset all index preferences to their default values

1. On the job step window, click the **Tools** menu, and then click **Options**.
2. Click **Indexing Preferences**.
3. Click **Reset**, and then click **Yes** in the confirmation message.
4. Click **OK** to save the restored default values and close the dialog box.



# Display Preferences

Display Preferences apply to all job steps. You can specify settings for single-display, multiple-display, the preferred image type, and the color used to indicate document breaks. (See "View Options" on page 52 for information about opening the single- and multiple- display views and other view options.)

## To specify settings for the single display view

1. On the job step window, click the **Tools** menu, and then click **Options**.
2. Click **Display Preferences**.
3. In the **Single Display** area, you can set the following options:
  - **Number of Thumbnails** - Type or select the number of thumbnails you want to appear on the **Thumbnails** window.
  - **Only Display Current Document** - Select this check box to display only one document at a time. Clear this check box to view all of the documents in the batch.
  - **Retain Browse Batch Docking** - Select this check box to retain the last position and state (open or closed) of the **Browse Batch** window. When this check box is cleared, the **Browse Batch** window position and state are not retained, and it will not open automatically, even if it was open when you last closed the batch.
  - **Retain Thumbnail Docking** - Select this check box to retain the last position and state (open or closed) of the **Thumbnails** window. When this check box is cleared, the **Thumbnails** window position and state are not retained, and it will not open automatically, even if it was open when you last closed the batch.



### T I P

Clearing the **Retain Browse Batch Docking** and **Retain Thumbnail Docking** check boxes may improve performance.

---

- **Show High Quality Image While Scanning** - Select this check box to display a high-quality image while scanning documents.
- 



### I M P O R T A N T

When the **Show High Quality Image While Scanning** check box is selected, scanning speeds will decrease.

---

4. Click **OK** to save your settings and close the dialog box.

## To specify settings for the multiple display view

1. On the job step window, click the **Tools** menu, and then click **Options**.
2. Click **Display Preferences**.
3. In the **Multiple Display** area, you can set the following options:
  - **Rows** - Type or select the number of rows you want to appear for multiple-page documents.
  - **Columns** - Type or select the number of columns you want to appear for multiple-page documents.

- **Only Display Current Document** - Select this check box to display only the current document in the batch. Clear this check box to view all of the documents in the batch.
- **Retain Browse Batch Docking** - Select this check box to retain the last position and state (open or closed) of the **Browse Batch** window. When this check box is cleared, the **Browse Batch** window position and state are not retained, and it will not open automatically, even if it was open when you last closed the batch.



### T I P

Clearing the **Retain Browse Batch Docking** check box may improve performance.

---

4. Click **OK** to save your settings and close the dialog box.

### To specify whether images display as bitonal

1. On the job step window, click the **Tools** menu, and then click **Options**.
2. Click **Display Preferences**.
3. In the **Images** area, select the **Preferred Bitonal** check box to cause images to display as bitonal. Bitonal images are black-and-white images that contain no grayscale.
4. Click **OK** to save your settings and close the dialog box.

### To change the color of the document break indicator

1. On the job step window, click the **Tools** menu, and then click **Options**.
2. Click **Display Preferences**.
3. In the **Document Breaks** area, click **change**.
4. In the **Color** dialog box, select the desired color, and then click **OK**.
5. Click **OK** to save your settings and close the dialog box.

### To reset all display preferences to their default values

1. On the job step window, click the **Tools** menu, and then click **Options**.
2. Click **Display Preferences**.
3. Click **Reset**, and then click **Yes** in the confirmation message.
4. Click **OK** to save the restored default values and close the dialog box.

# System Preferences

System Preferences apply to all job steps. You can specify settings for document and page navigation, batch creation, and batch assignment.

## To specify navigation options

1. On the job step window, click the **Tools** menu, and then click **Options**.
2. Click **System Preferences**.
3. In the **Navigation** area, you can set the following options:
  - **Stop at first/last page of document** - Select this check box to display a message when you try to go before the first page/document or beyond the last page/document. When this check box is cleared and you go before the first page/document, the last page of the current document appears; when you go beyond the last page/document, the first page of the current document appears.
  - **Hold Zoom Regions** - Select this check box for zoom regions you set on an image to be retained as you navigate through the document. When this check box is cleared, zoom regions are not retained.
  - **Hold OCR/Barcode Regions** - Select this check box for OCR or barcode regions you set on an image to be retained as you navigate through the document. When this check box is cleared, the OCR or barcode regions are not retained.
4. Click **OK** to save your settings and close the dialog box.

## To specify navigation options when copying documents and pages

1. On the job step window, click the **Tools** menu, and then click **Options**.
2. Click **System Preferences**.
3. In the **Copy Document/Pages** area, you can select one of the following options:
  - **Stay on original document/page** - Select this check box to open the original document/page after it is copied.
  - **Jump to newly created document/page** - Select this check box to open the newly copied document/page after it is copied.
4. Click **OK** to save your settings and close the dialog box.

## To specify batch creation options

1. On the job step window, click the **Tools** menu, and then click **Options**.
2. Click **System Preferences**.

3. In the **Batch Creation** area, select one of the following options to specify how batches behave when they are created.
  - Select **Add to Batches Waiting** to cause batches to appear on the **Batches Waiting** grid upon creation.
  - Select **Take Ownership** to automatically assume ownership of batches as they are created and have them appear on the **Batches Owned** grid.
  - Select **Take Ownership and Open** to automatically assume ownership of batches as they are created, have them appear on the **Batches Owned** grid, and then open them.



### NOTE

These options apply only to newly-created batches and do not apply to all batches in the job step.

---

4. Click **OK** to save your settings and close the dialog box.

### To specify auto batch assignment options

1. On the job step window, click the **Tools** menu, and then click **Options**.
2. Click **System Preferences**.
3. In the **Auto Batch Assignment** area, select one of the following options to specify what happens after you submit a batch.
  - Select **None** to return to the **PaperVision Capture** window after you submit a batch. This is the default option.
  - Select **Next Highest Priority** to go to the batch with the next highest priority. If no batches are found, you return to the **PaperVision Capture** window.
  - Select **Next Batch in Current Job Step** to go to the next batch in the current job step (that is, the job step you most recently worked on). For example, if you are indexing a batch and click **Submit**, then you are taken to the next batch ready for indexing. This option does not use batch priority in its assignment. If no batches are found, you return to the **PaperVision Capture** window.



### NOTE

These options apply only to newly-created batches and do not apply to all batches in the job step.

---

4. Click **OK** to save your settings and close the dialog box.

### To reset all system preferences to their default values

1. On the job step window, click the **Tools** menu, and then click **Options**.
2. Click **System Preferences**.
3. Click **Reset**, and then click **Yes** in the confirmation message.
4. Click **OK** to save the restored default values and close the dialog box.

# Import Preferences

You can set the default resolution and smoothing settings that are used by the Import Batch and Import Images operations for pdf files. Higher resolution and smoothing settings might improve the quality of pdf files during import operations. The default resolution is 150 dpi, and no smoothing is enabled by default.

## To specify import preferences

1. On the job step window, click the **Tools** menu, and then click **Options**.
2. Click **Import Preferences**.
3. From the **Resolution** list, select the number of dpi to use when importing .pdf files.
4. From the **Smoothing** list, select the level of smoothing to use when importing .pdf files.
5. Click **OK** to save your settings and close the dialog box.

## To reset all import preferences to their default values

1. On the job step window, click the **Tools** menu, and then click **Options**.
2. Click **Import Preferences**.
3. Click **Reset**, and then click **Yes** in the confirmation message.
4. Click **OK** to save the restored default values and close the dialog box.


# System Messages

System messages are available for many operations performed in the Operator Console. For each message, you can specify whether you want it to appear. By default, all messages are set to appear. Each message contains a check box that, when selected, will cause all future messages of the same kind to be suppressed until you reset the preference.



For the most part, system messages are confirmation messages. These messages, when set to true, ask if you want to proceed or cancel the operation stated in the message name. For example, the **Confirm Import Images** message, when set to true, appears when you import an image and gives you options to confirm or cancel the import operation.

There is one system message that is a notification, rather than a confirmation. The **Paper Jam** system message, when set to true, notifies you when the scanner has a paper jam.


## To view and sort system messages

1. On the job step window, do one of the following:
    - On the **Tools** menu, click **Options**.
    - On the toolbar, click **Options** .
  2. Click **System Messages**.
- A list of system messages appears on the right pane.


3. To sort the messages do one of the following:

- To sort the messages by category, at the top of the list, click **Categorized** .
- To alphabetically sort the messages without any categories, click **Alphabetical** .


### To specify the preference for a single system message

1. On the job step window, do one of the following:
  - On the **Tools** menu, click **Options**.
  - On the toolbar, click **Options** .
2. Click **System Messages**.  
A list of system messages appears on the right pane.
3. Select the message you want to set.
4. Click the list to the right of the message, and then select one of the following:
  - Select **True** to cause the message to appear each time the referenced operation occurs.
  - Select **False** to suppress the message.
5. Click **OK** to save your settings and close the dialog box.

### To specify the preference for all system messages

1. On the job step window, do one of the following:
  - On the **Tools** menu, click **Options**.
  - On the toolbar, click **Options** .
2. Click **System Messages**.  
A list of system messages appears on the right pane.
3. Do one of the following:
  - Click **Select All** to set all messages to **True** and cause them to appear each time the referenced operation occurs.
  - Click **Deselect All** to set all messages to **False** and suppress them.
4. Click **OK** to save your settings and close the dialog box.




### To reset all message preferences to their default values

1. On the job step window, do one of the following:
  - On the **Tools** menu, click **Options**.
  - On the toolbar, click **Options** .
2. Click **System Messages**.  
A list of system messages appears on the right pane.
3. Click **Reset**, and then click **Yes** in the confirmation message.
4. Click **OK** to save the restored default values and close the dialog box.


# Keyboard Shortcuts (Hot Keys)

Keyboard shortcuts are available for most commands in the PaperVision Capture Operator Console. You can customize the keys used to run the commands.


## To view and sort keyboard shortcuts (hot keys)

1. On the job step window, do one of the following:
  - On the **Tools** menu, click **Options**.
  - On the toolbar, click **Options** .
2. Click **Hot Keys**.  
A list of commands and their keyboard shortcuts appears on the right pane.
3. To sort the commands do one of the following:
  - To sort the commands by category, at the top of the list, click **Categorized** .
  - To alphabetically sort the commands without any categories, click **Alphabetical** .

## To customize keyboard shortcuts (hot keys)

1. On the job step window, do one of the following:
  - On the **Tools** menu, click **Options**.
  - On the toolbar, click **Options** .
2. Click **Hot Keys**.  
A list of commands and their keyboard shortcuts appears on the right pane.
3. Select the command you want to set.
4. Click the drop-down arrow to the right of the message.
5. From the **Key** list, select the primary key you want to assign to the command.
6. To create a key combination select the check box next to key(s) you want to include (**Alt**, **Shift**, **Ctrl**).
7. Click the drop-down arrow.  
If the keys you selected are already in use, a message appears, and you must choose different keys.
8. Click **OK** to save your settings and close the dialog box.

## To reset all keyboard shortcuts (hot keys) to their default values

1. On the job step window, do one of the following:
  - On the **Tools** menu, click **Options**.
  - On the toolbar, click **Options** .
2. Click **Hot Keys**.  
A list of commands and their keyboard shortcuts appears on the right pane.

3. Click **Reset**, and then click **Yes** in the confirmation message.
4. Click **OK** to save the restored default values and close the dialog box.


## Customize Toolbars

You can customize the **Batch Navigation**, **Indexing**, **QC**, **Scanning**, and **Standard** toolbars by:

- Adding commands, labels, and separators.
- Deleting toolbar items.
- Changing the order of toolbar items.
- Specifying display options for toolbar commands.

You can also create new toolbars to contain existing commands.

### To add an item to a toolbar


1. On the job step window, do one of the following:
  - On the **Tools** menu, click **Options**.
  - On the toolbar, click **Options** .
2. Click **Toolbars**.
3. From the **Toolbar** list, select the toolbar you want to modify.  
The toolbar items appear in the **Controls** area.
4. On the right side of the **Controls** area, click the drop-down arrow on the **Add** button, and then do one of the following:

| To add a  | Do this   |
|-----------|---|
| Command   | <ol style="list-style-type: none"> <li>1. Click <b>Command</b>.</li> <li>2. In the <b>Select Command</b> dialog box, from the <b>Category</b> list, select the category for the command you want to add.<br/><br/>A list of available commands appears in the <b>Commands</b> area. Some available commands do not have an assigned icon, but you can add one. (See "To set display options for a toolbar command" on the facing page for more information.)</li> <li>3. Select the command you want to add, and then click <b>OK</b>.</li> </ol> |
| Label     | <ol style="list-style-type: none"> <li>1. Point to <b>Label</b>, and then click the box that appears.</li> <li>2. Type the label you want to appear on the toolbar.</li> <li>3. Point to a different command on the drop-down menu.</li> </ol>  |
| Separator | <ul style="list-style-type: none"> <li>■ Click <b>Separator</b>.</li> </ul>   |




5. The item you added appears in the **Controls** area at the bottom of the list.
6. To change the display order of the item, select it, and then click **Move Up** or **Move Down**.
7. When you are finished modifying the toolbar, click **OK** to save your settings and close the dialog box.


### To delete an item from a toolbar

1. On the job step window, do one of the following:
  - On the **Tools** menu, click **Options**.
  - On the toolbar, click **Options** .
2. Click **Toolbars**.
3. From the **Toolbar** list, select the toolbar you want to modify.  
The toolbar items appear in the **Controls** area.
4. In the **Controls** area, click the item you want to delete, and then click **Delete**.
5. When you are finished modifying the toolbar, click **OK** to save your settings and close the dialog box.

### To change the display order of a toolbar item

1. On the job step window, do one of the following:
  - On the **Tools** menu, click **Options**.
  - On the toolbar, click **Options** .
2. Click **Toolbars**.
3. From the **Toolbar** list, select the toolbar you want to modify.  
The toolbar items appear in the **Controls** area.
4. In the **Controls** area, click the item you want to move, and then click **Move Up** or **Move Down**.
5. When you are finished modifying the toolbar, click **OK** to save your settings and close the dialog box.

### To set display options for a toolbar command


1. On the job step window, do one of the following:
  - On the **Tools** menu, click **Options**.
  - On the toolbar, click **Options** .
2. Click **Toolbars**.
3. From the **Toolbar** list, select the toolbar you want to modify.  
The toolbar items appear in the **Controls** area.
4. In the **Controls** area, click the command you want to change.

- Click the drop-down arrow on the **Display** button, and then do one of the following:

| To   | Do this   |
|--|---|
| Change the button image                    | Click <b>Change Button Image</b> , and then click the image you want to use.                                |
| Reset the button image                     | Click <b>Reset Button Image</b> . The image originally assigned to the command appears, including no image. |
| Display only an image for the command      | Click <b>Image Only</b> .   |
| Display only text for the command          | Click <b>Text Only</b> .  |
| Display the image and text for the command | Click <b>Image and Text</b> .   |

- When you are finished modifying the toolbar, click **OK** to save your settings and close the dialog box.

### To reset a toolbar to the default settings

- On the job step window, do one of the following:
  - On the **Tools** menu, click **Options**.
  - On the toolbar, click **Options** .
- Click **Toolbars**.
- From the **Toolbar** list, select the toolbar you want to reset.




#### NOTE

The **Reset** function is available only for the default toolbars and restores the original commands and their order. If you modified an image for an original command, you must manually reset the image. (See "To set display options for a toolbar command" on the previous page for more information.)


- When you are finished modifying the toolbar, click **OK** to save your settings and close the dialog box.

### To add a custom toolbar

- On the job step window, do one of the following:
  - On the **Tools** menu, click **Options**.
  - On the toolbar, click **Options** .
- Click **Toolbars**.
- To the right of the **Toolbar** list, click **Add**.

4. In the **Enter Toolbar Name** dialog box, in the **Name** box, type a name for the toolbar.
5. See "To add an item to a toolbar" on page 136 for instructions to add items.
6. When you are finished modifying the toolbar, click **OK** to save your settings and close the dialog box.

### To delete a custom toolbar

1. On the job step window, do one of the following:
  - On the **Tools** menu, click **Options**.
  - On the toolbar, click **Options** .
2. Click **Toolbars**.
3. From the **Toolbar** list, select the toolbar you want to delete.



#### **N O T E**

The **Delete** function is available only for the custom toolbars you create. You cannot delete any of the default toolbars.

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4. To the right of the **Toolbar** list, click **Delete**.
5. When you are finished making changes, click **OK** to save your settings and close the dialog box.