

Perceptive Content

New Feature Introduction

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perceptivesoftware
from Lexmark

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Overview

Perceptive Content 7.0.5.821 contains new products, features, and product enhancements. This guide provides an overview of each of these areas in the following sections.

New products and features introduce the new functionality available in your Perceptive Content 7.0 system.

Product enhancements provide an overview of the updates and enhancements made to existing features.

Platform enhancements provide an overview of the enhancements made to existing development tools, such as iScript and Message Agent.

New Products and Features

This section highlights, in alphabetic order, new products and features available in Perceptive Content, version 7.0.

Department Administration

Department administration provides the ability to administer multiple departments on a single Perceptive Content instance as if each department existed as a separate instance of Perceptive Content. This allows for greater security and specificity for your entire organization. Departments provide the capability to separate configuration components into logical business areas, such as departments of your company or geographic locations.

You can create a department that conveniently pertains to a particular section of your business with no content overlapping with other departments in your business. This setup keeps the department information secure from users in other departments. Departments are an effective way to give administrators access to every feature in Perceptive Content without giving those administrators access to information and features applicable to other departments in your business.

You must be granted at least one management privilege for a department to access that department in Management Console. You can have privileges to access more than one department but you can only access one department at a time. When you select a department, every setting or feature you modify in Management Console applies to the selected department only.

The Perceptive Content installation automatically establishes a default department in which to work. Because department administration is an optional feature, you can choose not to create additional departments. For example, your company has several different departments, including the Human Resources, Finance, Marketing, and Sales departments. Each of the four departments produces content that has little or no crossover with the other areas and each department tends to use Perceptive Content for entirely different purposes. To allow users in each department to see only the content and architecture that pertains to them, you implement a Human Resources Department, Finance Department, Marketing Department, and Sales Department, and move all related content and users to the respective department.

In this scenario, to create a drawer in the Marketing Department that the Sales Department can also use, you can choose to share the drawer. By sharing the drawer with the Sales Department, a Sales manager can now reference the Marketing drawer in the configuration options of the Sales department as if the drawer was in the Sales Manager's own department.

What is a Perceptive Manager?

With the addition of the department administration feature, the manager and owner users and privileges have been replaced with a Perceptive Manager and a Department Manager user.

A Perceptive Manager is a specialized user who can create other users, assign Global privileges to other users, create and configure departments, and promote other users to the Department Manager role.

Perceptive Managers administer two general aspects of the system that are inaccessible to other users. The first is the ability to manage the entire pool of global users. Perceptive Managers create all users in the system, regardless of department. These users can assign user and group privileges in the Global privilege category and remove users from the system. A Perceptive Manager cannot assign his or her own privileges, nor can a Perceptive Manager remove other Perceptive Managers from the system.

A Perceptive Manager also controls the department configuration for the system. Perceptive Managers are the only users who create the departments in the system, modify the department name and displayed information, create and modify department labels, promote a user to the Department Manager role, and demote a user from being a Department Manager.

When you promote a user to the Perceptive Manager role, that user is assigned the security privileges in the Global Manage category automatically, with the exception of the Reports privilege.

By default, Perceptive Managers can migrate components and subcomponents within ImageNow between different environments.

The first Perceptive Manager in the system is created during the installation process. You can create a subsequent Perceptive Manager with an INTTool command. To promote a user to the Perceptive Manager role, you must be a Perceptive Manager. A user can be a Perceptive Manager and a Department Manager simultaneously.

What is a Department Manager?

With the addition of the department administration feature the manager and owner users and privileges have been updated to a Perceptive Manager and a Department Manager user.

A Department Manager is a user role with privileges to perform any administrative action in its respective department. Only a Perceptive Manager can promote a user to the Department Manager role.

A Department Manager has access to all forms of content within his or her department other than content protected by access control markings. The Department Manager is automatically granted all privileges in the system for the assigned department other than privileges in the Global privilege category. The Department Manager is also the only user role that can share objects defined in Management Console in the manager's department with other departments.

Department Managers assign department-level privileges to users and can determine what types of content to share with other departments. Department Managers can manage, migrate, and share several items in a department, including drawers, groups, application plans, and workflow processes. However, Department Managers cannot administer settings found in the Cross Department Settings area of Management Console without additional privileges. These settings include audit profiles, Business Insight reports, and digital signature certificates.

Department Managers are the only users able to move items between departments on the same system. A move operation requires one Department Manager to send the move package from their department and another Department Manager from the destination department to accept the move package into their department.

A user can be a Department Manager for any number of departments. A Perceptive Manager can be a Department Manager simultaneously. You can have multiple Department Managers for a single department in the system.

Records Manager

Records Manager allows you to capture records or declare existing documents as records, place the records in a file plan structure, and ultimately process the records using the disposition actions configured in a retention policy. When you implement Records Manager licenses, you gain access to the entire records suite including Retention Policy Designer, File Plan Designer, and all of the Records functionality. Without Records Manager licenses, you cannot see records functionality.

What is a record?

Records are preserved because of the value of data in the record. A record is a captured image or a file in the system that contains specific restrictions and properties. The system places a record in a file plan structure hierarchy. The placement in the file plan can determine additional behaviors for the record such as how long to maintain the record in the system, to what degree a user can modify the record, and whether a record is categorized as vital.

Along with the access privileges that are available for documents, records security also provides additional access restriction to records. Records can have many properties; however, the following properties are required properties specific to a record.

- Author
- Originating organization
- Publication date

What is a file plan?

A file plan is an organizational structure where you apply retention policies and organize records. A file plan consists of the following elements.

- **File plan.** The file plan is the highest level placeholder for all elements nested in the organized hierarchy.
- **Record category.** Place a record category under the file plan level. You cannot nest a category under another record category, but you can place multiple record categories under the file plan level. You associate disposition and cutoff instructions with the record category. All of the children nested under a record category inherit these instructions. You can place a record at this level. You can declare a vital record at this level. You must assign a retention policy to a record category.
- **Record folder.** Place this element under record categories or under other record folders. You can declare a vital record at this level. You can place records in this level.
- **Record.** Capture a record to effectively preserve information and categorize it according to a predefined list of values. You can place a record under the record category or record folder elements.

Product Enhancements

This section provides, in alphabetic order, an overview of enhancements made to existing functionality. This release provides updates to the following products and features.

- Business Insight
- Capture
- Interact for Outlook
- Language Support
- Licenses
- Migration
- Online Help
- Server enhancements

Business Insight

The following Business Insight enhancements are available in Perceptive Content 7.0.

New reports

This release of Business Insight provides the new reports listed in the following table.

Category	Report	Description
Administrative	Access Control Markings Group Security	Report displays group level privileges applied to access control markings
Administrative	Access Control Markings User Security	Report displays resolved user level privileges applied to access control markings
Administrative	Department Group Security	Report displays group level privileges applied to departments
Administrative	Department User Security	Report displays resolved user level privileges applied to departments
Administrative	External Messaging Agent Monitoring	Report displays a broad set of information regarding the performance of the external message agent
Administrative	File Plan Group Security	Report displays group level privileges applied to file plans
Administrative	File Plan Hierarchy Summary	Report displays a list view of the file plan hierarchy contents

Category	Report	Description
Administrative	File Plan User Security	Report displays resolved user level privileges applied to file plans
Administrative	Record Category Type Group Security	Report displays group level privileges applied to record category types
Administrative	Record Category Type User Security	Report displays resolved user level privileges applied to record category types
Administrative	Record Container Group Security	Report displays group level privileges applied to record containers
Administrative	Record Container User Security	Report displays resolved user level privileges applied to record containers
Administrative	Record Folder Type Group Security	Report displays group level privileges applied to record folder types
Administrative	Record Folder Type User Security	Report displays resolved user level privileges applied to record folder types
Administrative	Record Type Group Security	Report displays group level privileges applied to record types
Administrative	Record Type User Security	Report displays resolved user level privileges applied to record types

Capture

The following Capture enhancements are available in Perceptive Content 7.0.

Sort Application Plans

Members of a predefined list can now be sorted in ascending or descending order for Application Plan Designer and Capture Profiles. Click Name header when you edit or add list members to sort in descending order, and then click again to switch to ascending order.

New names still appear at the bottom of the list when added, and can still be moved up or down as desired for full customization. The list member order is still saved as-is after you click the OK button, so that you can return to the list as you left it.

Rescan available for TWAIN

You now have the ability to use a TWAIN scanner to rescan a page in a viewer before you save it as a document. You can also use a TWAIN scanner to scan a page and add it to an existing document.

Interact for Outlook

You can now declare records and import emails as records into Perceptive Content 7.0.

In addition to the general property information that applies to every record, you can provide page-level metadata about each record page when declaring an email and attachments as a record.

Adding page-level metadata to a record is optional when you declare an email and attachments as a record. If you click Declare prior to entering page-level metadata, you can still add the appropriate metadata at any time from within.

Language Support

Perceptive Content can now process and display 2-byte characters commonly found in the Asia Pacific markets. Perceptive's Unicode support now extends to Japanese, Korean, and Simplified Chinese (Mandarin).

Licenses

Perceptive Content 7.0 includes the following enhancements to licensing.

License groups

You create license groups, add users to license groups, and then determine the number of licenses to distribute from your unassigned licenses to the license groups. You can create as many license groups as your business needs require. A user can belong to only one license group.

In addition to assigning licenses to individual groups, you can leave some licenses unassigned. These unassigned licenses serve as an overflow. The system uses assigned licenses before consuming unassigned licenses. At any time, you can rename or remove license groups as well as remove users from a license group.

License groups can be implemented with concurrent licenses. License groups can also be used with combo licenses. You cannot distribute overdraft-enabled licenses to individual groups.

Combo licenses

Combo licenses include coverage for Mobile and Web as access points for the Evolution platform. Combo licenses are enabled as a dynamic pool of licenses available for consumption by any of these client types, at any time, without a predefined allocation. This approach allows customers to purchase a single license type, which a user can acquire to connect to any of these client types.

Migration

The following new components can be duplicated in the target environment in Perceptive Content 7.0.

- File plans
- Record category types
- Record folder types
- Record types

Online Help

You can access documentation from the Help menu, which launches a web-based landing page. The new format allows for dynamically updated content and greater searchability. The documentation has been reorganized to display the most relevant information based on where in the application you open help.

Platform enhancements

Perceptive Content 7.0 provides the following enhancements to development tools.

iScript

The following table provides a list of additions and modification to iScript 7.0.

Object	Description
getDepartmentContextName()	Retrieves the department name under which the script is currently running.
getDepartmentContextId()	Retrieves the department ID under which the script is currently running.
setDepartmentContextByName(string departmentName)	Changes the department the script is currently running under to the specified department name.
setDepartmentContextById(string departmentId)	Changes the department the script is currently running under to the specified department ID.
setDepartmentPrivs(string userName/groupName, INPrivEnum/string priv or array of INPrivEnum/string privs)	This function sets the department privileges for the given user or group in the current department context.

Integration Server

In Perceptive Content 7.0, Integration Server contains the following new web service APIs:

Operation	Description
GET: /department	Retrieves department information for all departments
GET: /department/{id}	Retrieves a department by ID
POST: /department	Creates a department and assigns a department manager for the new department
PUT: /department/{id}	Provides the ability to add or remove managers and update the name, description, or prefix of a department, identified by its unique ID
GET: /annotationTemplate	Gets the annotation template stored in ImageNow Server for which the user has privileges
GET: /annotationTemplate/PICTURE_STAMP/{id}/file	Returns an annotation template file for a Picture Stamp annotation template that is stored in ImageNow Server
HEAD: /annotationTemplate/PICTURE_STAMP/{id}/file	Requests the file information associated with the annotation template stored in ImageNow Server