# Brainware Intelligent Capture Visibility

## User Guide

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# Introduction

Brainware Intelligent Capture Visibility (BIC Visibility) is a web-based reporting tool that allows users to view adhoc and custom reports from their Intelligent Capture data. This product gives users insight and visibility into their processed data at any point in time.

Visibility is a white-labeled product from Intellicus. The product requires a Windows Operating system for installation. It also requires a client provided reporting database that can be Oracle or Microsoft SQL.

> **Note:**
>
> **Note** It is not recommended that you install BIC Visibility on the same server as Intelligent Capture. The images that Visibility uses are pulled directly from within a database or from a file-based folder.

Visibility includes several components that allow you to customize your reporting. The components are:

- **Report Server.** This component is an independent process that handles reporting needs by all users who are generating reports through various Visibility reporting components.
- **Web Studio Report Designer.** Use this web-based designer GUI within the web portal. You can design and preview any complex report and deploy it on the report server using wizards, drag and drop functionality, and scripting features.
- **Web Portal.** An end user accesses the web portal to generate reports; an Administrator uses the portal to design, deploy, and manage reports as well as to perform any administrative tasks.
- **Adhoc Report Wizard.** This component allows users to design adhoc reports on their own with groupings, summaries, and charts.
- **Report Viewer.** The viewer presents the report output to the end user. It allows the user to view, save, print, and export reports.
- **Adhoc Power Viewer.** This is an extension of the report viewer. The power viewer allows the user to re-organize information on an adhoc report including the ability to regroup, resort data, and redraw charts for adhoc reports in realtime. It also helps users categorize, summarize, and analyze their information.
- **Dashboard.** This is a collection of interactive and auto-refreshed reports and charts from various data sources. The information displays within a single screen.
- **Scheduler.** This component allows users to run reports at a pre-specified time or on a recurring basis. Scheduler also allows users to distribute the reports to one or more destinations using variety of outlets such as email, FTP, or printers.

# Log in

To log in to BIC Visibility, complete the following steps.

1. Open BIC Visibility in a web browser to access the **Login** screen.
2. Enter your user credentials provided by your administrator and click **OK**.
3. From the **Options** button, select the organization that contains the reports you want to review.

# Visibility Web Portal

The BIC Visibility Web Portal offers a simple and fast user interface from which you can access all reports and configurations on one screen. The look and feel is similar to a website with menus, active elements, and hyperlinks. Tooltips explain the functionality of buttons. The Help button provides context-sensitive help information.

The user interface contains the following elements.

- Visibility Header toolbar
- Navigation Sidebar menu
- Main viewer area

## Visibility Header toolbar

The Header toolbar provides a quick overview of the program status. This toolbar is always visible at the top of all BIC Visibility panes.

You can click Edit Mode to access the dashboard parameters, elements, settings, context-sensitive help, and a lot of other options.

## Navigation Sidebar menu

The Navigation Sidebar menu contains the main BIC Visibility menu, which consist of the following options: **Navigate**, **Explorer**, **Home**, **Alert**, **Settings**, and **Info**.

To view the Navigation Sidebar menu options, complete the following steps.

1. Click the selected menu icon to open the related submenu.
2. To close the submenu, click outside of the submenu area.

### Navigate

The **Navigate** menu displays the main functions of BIC Visibility, which include Analytics, Reports, Schedule, Design, Notify, Repository, Administration and Personalization.

### Explorer

The **Explorer** menu displays all available objects and categories. The initial menu that displays when you select this option is a list of the report categories. For example, you can view Accounts Payable or Verifier information. You can drill down each report category and access saved reports, query objects, parameter objects, and dashboards.

### Home

The Home page is the central information location for user activity. Different information panels display depending on the user's rights. The Home page is set as a starting page after you log in when no dashboard is subscribed or can be accessed by selecting Home from the sliding menu.

The Home page contains the following elements.

- **My recent Reports.** Displays a list of the recently run reports of the current user.
- **Execution Status and Recent Errors.** Collects important status information and error messages on reports.
- **Portal Preferences.** Manages the default user settings.
- **My Links.** Locates the most important sites in the Web Portal. All links open in a new window or tab depending on your browser settings.

### Alert

The Alert menu option displays a list of running reports, pending reports, and reports based on alerts you have configured in the system.

To open a list of reports contained in a specific category, complete the following steps.

1. On the left navigation menu, click **Alert**. The **Alert** menu appears.
2. Click the name of the alert whose information you want to view.

### Settings

The Settings menu option enables you to select a database where your settings are saved.

You can also save this setting in **Preferences**.

### Info

The Info menu option enables you to view the server time, server version, portal versions and current build version for Brainware Visibility.

## Main viewer area

The main viewer area displays the variable content for BIC Visibility based on the action or selection of the user. All main configuration panels and lists display within the viewer area. The initial display for the main viewer area is a dashboard if the user subscribed to a dashboard, otherwise the Home page displays.

# Dashboards

The Dashboard viewer displays the following elements.

- Taskbar
- Navigate tab
- Input Parameter Form
- Dashboard viewer

To return to the dashboard viewer after using the viewer for other tasks, from the Sidebar menu, select Navigate > Home.

### Taskbar

The Dashboard toolbar contains the following options:

- **Edit Mode:** Select this option to change the dashboard to edit mode, which allows access to dashboard settings, the ability to add widgets, and the option to save the dashboard.
- **Info**: Select this option to view additional information about the dashboard.

### Navigation tab

When multiple dashboards are opened, you can access them through the navigation tab, which displays at the top, left of the dashboard. You can select a tab on the dashboard viewer to view a dashboard.

### Input Parameter Form

To access the Input Parameter Form, complete the following steps.

1. Select the drop-down to the right of the **Dashboard** name.
2. Select **Parameters**.

### Dashboard viewer

The Dashboard viewer shows the report widgets that the user preselects. Each report widget has its own foldout title bar with action buttons to minimize or maximize the widget.

A foldout taskbar is available for adhoc reporting below the title bar. This taskbar provides access to the Adhoc Power Viewer settings.

To access the Dashboard viewer, complete the following steps.

1. Move the pointer over the icons to view the tool-tips. If no tool-tip displays, there is no drill-down function.
2. Left-click the icons to open a submenu or execute the associated function.
3. After you access the available functions, you can select one of the following features to manage your reports: **Change Chart type, Link Chart with Report Fields, Change Data,** or **Reset Changes**.
4. Right-click the taskbar to open a submenu of available options.
5. Customize the Adhoc Report in the context menu. For example, you can show and group data or change templates. Change the size of each widget display by dragging the sides of the page to the desired position.

## Intelligent Capture reports

BIC Visibility provides a multitude of customized reports. You can select reports from the following categories: Capture, Verifier, and Accounts Payable. Customized reports are available from the Custom folder.

# Accounts Payable reports

## Average Extraction with Line Pairing report

This report shows the Field Level Extraction percentage, STP percentage, and Line-Pairing percentage for Today, Yesterday, Last 7 Days and Last 30 days based on the document export date. The report is similar to the Average Extraction report with an additional column for Line-Pairing statistics.

| Filter Parameter | Definition |
|---|---|
| Organization | The organization associated with the documents |
| Project | The Project where the reports are getting their data from |
| Client ID | The client documents that should be included in the report results |
| Extraction Fields | The fields that should be included in calculating Field Level Extraction |

| | Report Output | Definition |
|---|---|---|
| 1 | % Correct | The Percentage of the fields that have been correctly extracted by Intelligent Capture and did not require Verifier correction |
| 2 | % STP | Straight Through Processing - documents that run straight through Intelligent Capture without human intervention |
| 3 | % Lines Paired | The percentage of the PO lines that successfully completed the line pairing routine. |

| Drill Down | Destination |
|---|---|
| Click the % Correct or % STP column(s) in Bar Chart | The Snapshot Statistics |
| Click the % Lines Paired column(s) in Bar Chart | The Line Pairing Statistics |

## Field Extraction by Vendor report

This report displays the field level extraction and verification statistics for a given Vendor ID. If no Vendor ID is provided in the parameter, the query results include all vendors with the field statics grouped by Vendor

Name.

| Filter Parameter | Definition |
|---|---|
| Selected Date Range | The date range selected by the user for each report |
| Organization | The organization associated with the documents |
| Project | The Intelligent Capture Project from which the reports are pulling data |
| Class Name | The class name selected by the user when running the report |
| Vendor ID | The Vendor ID provided when running the report (if provided) |
| Extract Field | The list of fields which will be included in the report results. |
| Client ID | The client documents that should be included in the report results |

| | Report Output | Definition |
|---|---|---|
| 1 | Field | The project field name returned from the report query |
| 2 | Num Docs | The number of documents that included the field |
| 3 | % Verified | The percentage of a specific field that has been verified |
| 4 | % Correct | The percentage of the fields that have been correctly extracted by Intelligent Capture |
| 5 | % Not Inv | The percentage of a specific field that is not on the invoice document |
| 6 | Vendor Name | The Vendor Name associated with the Vendor ID |

| Drill Down | Destination |
|---|---|
| Field | The Field Extraction Exception |

## Invoice Discovery report

This report allows the user to search or query invoices in a given date range based on field parameters, such as, invoice number or date, vendor name or number invoice amount, current state, class type, PO number or type. Adhoc reports allow a user to modify the report so that it meets the users desired style and format; such as rearrange fields, format fields, show fields that are hidden, and hide fields.

| Filter Parameter | Definition |
|---|---|
| Selected Date Range | The date range selected by the user for each report |
| Organization | The organization associated with the documents |
| Project | The Intelligent Capture Project from which the reports are pulling data |
| Client ID | The client documents that should be included in the report results |

| | Report Output | Definition |
|---|---|---|
| 1 | Document No | The unique document identifier determined by Intelligent Capture. The default is the image name. |
| 2 | Vendor ID | The Vendor ID associated with the document |
| 3 | Company Code | The Company Code associated with the document |
| 4 | Exported Date | The date on which the document was exported by Intelligent Capture |
| 5 | Currency | The currency associated with the document |
| 6 | Invoice Number | The invoice number associated with the document |
| 7 | Amount Total | The total amount extracted from the document |
| 8 | Current State | The Intelligent Capture state in which the document currently exists |
| 9 | Link | The link that opens to an image of the document |

| Drill Down | Destination |
|---|---|
| Document No | The Field Extraction Results |
| Link | The link that opens to an image of the document |

## Invoice Discovery Historical report

This report provides a list of invoices by vendor with a specified date range showing status from import date to export date, or for a select state.

An adhoc report allows user to modify the report so that it meets the user's desired style and format. The user can re-arrange fields, format fields, show fields that are hidden, hide fields, and more.

| Filter Parameter | Definition |
|---|---|
| Selected Date Range | The date range selected by the user for each report |
| Organization | The organization associated with the documents |
| Project | The Intelligent Capture Project from which the reports are pulling data |
| Client ID | The client documents that should be included in the report results |
| Previous State | The last Intelligent Capture state in which the document completed |

| | Report Output | Definition |
|---|---|---|
| 1 | Document No. | The unique document identifier determined by Intelligent Capture. The default is the image name. |
| 2 | Vendor ID | The Vendor ID number of the company |
| 3 | Historical Status | The state the document has entered |
| 4 | Company Code | The Company Code for the company |
| 5 | Export Date | The date on which a document is exported from Intelligent Capture |

| | Report Output | Definition |
|---|---|---|
| 6 | Currency | The currency displays if it is an extracted field |
| 7 | Invoice Number | The vendor's invoice number |
| 8 | Amount Total | The invoice amount |
| 9 | Link | The link that opens to an image of the document |

| Drill Down | Destination |
|---|---|
| Document No | The Field Extraction Results |
| Link | The link that opens to an image of the document |

## Line Pairing Document Snapshot report

This report displays the Document Number, Vendor Name, Import Date, Extract Date, and Export Date along with a link to the document based on the selected Line-Pairing status(es). The report is also available as a drill down from the Line Pairing Statistics Report by clicking on the Num Docs column for a given status.

| Filter Parameter | Definition |
|---|---|
| Selected Date Range | The date range selected by the user for each report |
| Organization | The organization associated with the documents |
| Project | The Intelligent Capture Project from which the reports are pulling data |
| Client ID | The client documents that should be included in the report results |
| Line Pairing Status | The results of the line pairing performed during document export |

| | Report Output | Definition |
|---|---|---|
| 1 | Line Pairing Status | The results of the line pairing performed during document export |
| 2 | Document No. | The unique document identifier determined by Intelligent Capture. The default is the image name. |
| 3 | Vendor Name | The vendor name associated with the invoice |
| 4 | Import Date | The date on which a document was imported by Intelligent Capture |
| 5 | Extract Date | The date on which a document was extracted by Intelligent Capture |
| 6 | Export Date | The date on which a document was exported from Intelligent Capture |
| 7 | Link | The link that opens to an image of the document |

| Drill Down | Destination |
|---|---|
| Link | The link that opens to an image of the document |

## Line Pairing Statistics report

This report shows the Number of Documents, Lines and Lines Paired and the Percentage of Docs in each Status grouped by the Line-Pairing Status. This report is also available as a drill down from the Average Extraction with Line Pairing Report by clicking on the % Lines Paired column.

| Filter Parameter | Definition |
|---|---|
| Selected Date Range | The date range selected by the user for each report |
| Organization | The organization associated with the documents |
| Project | The Intelligent Capture Project from which the reports are pulling data |
| Client ID | The client documents that should be included in the report results |

| | Report Output | Definition |
|---|---|---|
| 1 | Document Line Pairing Result | The results of the line pairing performed during document export |
| 2 | Num Docs | Number of documents with the line pairing result |
| 3 | Num Lines | Number of lines on the documents |
| 4 | Lines Paired | Number of lines paired on the documents |
| 5 | % Docs in Status | Percentage of overall document count in the line pairing result |

| Drill Down | Destination |
|---|---|
| Num Docs | Line Pairing Document Snapshot |

## Snapshot Invoice report

This report displays the Field Level Extraction rates and the percentages Verified for each field in an area chart along with a filterable table of the fields and their Extraction and Verification percentages.

| Filter Parameter | Definition |
|---|---|
| Selected Date Range | The date range selected by the user for each report |
| Organization | The organization associated with the documents |
| Project | The Intelligent Capture Project from which the reports are pulling data |
| Client ID | The client documents that should be included in the report results |
| Class | Document class which should be included in report results |

| | Report Output | Definition |
|---|---|---|
| 1 | Field | The project field name |

| | Report Output | Definition |
|---|---|---|
| 2 | % Verified | Percentage of a specific field that has been verified |
| 3 | % Correct | Percentage of a fields that has been correctly extracted by Intelligent Capture |
| 4 | % Not on Doc | Percentage of a specific field that is not on a document |

## Vendor Snapshot Statistics report

This report is a summary that shows the extraction performance by vendor in a specific date range. The % Verified and % Correct columns displayed Green, Yellow, and Red.

| Filter Parameter | Definition |
|---|---|
| Selected Date Range | The date range selected by the user for each report |
| Organization | The organization associated with the documents |
| Project | The Intelligent Capture Project from which the reports are pulling data |
| Extract Field | The list of fields that will be included in the report results. |
| Client ID | The client documents that should be included in the report results |

| | Report Output | Definition |
|---|---|---|
| 1 | Vendor Name | Vendor Name associated with the documents |
| 2 | Num Docs | Number of documents associated with the Vendor |
| 3 | Num Fields | Number of fields extracted from the documents |
| 4 | % Verified | Percentage of a specific field that has been verified |
| 5 | % Correct | Percentage of the fields that have been correctly extracted by Intelligent Capture |
| 6 | % Not On Document | Percentage of a specific field that is not on a document |
| 7 | % STP | Percentage of documents that run straight through |

| Drill Down | Destination |
|---|---|
| Vendor Name | The Field Extraction By Vendor |
| Num Docs | Document Snapshot |

### Intelligent Capture Dashboard with Line Pairing

The Intelligent Capture Dashboard with Line Pairing enables you to view generated data from different types of Account Payable reports, simultaneously.

These reports are generated based on the default filter parameters. You can also modify the parameters such as the selected date range, organization(s), project(s), client(s) and project level class(es), based on which the reports are generated and displayed in widgets on the dashboard.

## Capture reports

This section provides a list of capture reports available with BIC Visibility as well as the filter parameters and output for each report.

### Average Extraction report

This is an at-a-glance chart that displays field extraction percentages and document straight through processing (STP) percentage results for user selected fields from today, yesterday, the last 7 days, and the last 30 days.

| Filter Parameter | Definition |
|---|---|
| Organization | The organization associated with the documents |
| Project | The project from which the reports are pulling data |
| Client ID | The client documents that should be included in the report results |
| Extraction Fields | The fields that should be included in calculating Field Level Extraction |

| Report Output | Definition |
|---|---|
| % Correct | The percentage of fields that are correctly extracted by Intelligent Capture and do not require |

| Report Output | Definition |
|---|---|
| | Verifier correction |
| % STP | The percentage of Straight Through Processing of documents that run straight through Intelligent Capture without human intervention |

| Drill Down | Destination |
|---|---|
| Click the Bar Chart | Snapshot Statistics |

## Average Extraction by Date report

This is an at-a-glance chart that shows the field extraction percentage and document straight through process (STP) percentage results for user selected fields from a specified day, the day before, the previous 7 days, and the previous 30 days. User-defined thresholds for Normal, Warning, and Critical are also shown next to the chart.

| Filter Parameter | Definition |
|---|---|
| Selected Date | The start date the user selects for the report |
| Organization | The organization the user associates with the documents |
| Project | The project from which the reports are pulling data |
| Client ID | The client documents that the user includes in the report results |
| Extraction Fields | The fields that the user includes to calculate Field Level Extraction |

| | Report Output | Definition |
|---|---|---|
| 1 | % Correct | The percentage of the fields that are correctly extracted by Intelligent Capture and do not require Verifier correction |
| 2 | % STP | The percentage of Straight Through Processing of documents that run straight through |

| | Report Output | Definition |
|---|---|---|
| | | Intelligent Capture without human intervention |
| 3 | Specified Date | The date entered in select date fields in report parameters |
| 4 | Status Bars | The user defined threshold status |

## Classification Detail report

This report shows a list of documents that require manual classification through the Verifier within a selected time range. The report utilizes the Project Generic Class and Project Generic Parent Class parameters for a project with Supervised Learning Workflow.

| Filter Parameter | Definition |
|---|---|
| Selected Date Range | The start and end dates the user selects for the report |
| Organization | The organization associated with the documents |
| Project | The project from which the reports are pulling data |
| Client ID | The client documents you must include in the report results |
| Class Name | The project level classes you want to include in the report |
| Generic Class | The generic class in the project that is moved to a parent class post extraction. If the documents Generic Class = Parameter Value and Generic Parent Class = Parameter Value, the document is considered classified correctly. |
| Generic Parent Class | The parent class in the project to which a generic class document is moved post extraction. If the documents Generic Class = Parameter Value and Generic Parent Class = Parameter Value, the document is considered classified correctly. |

| | Report Output | Definition |
|---|---|---|
| 1 | Document No. | The unique document identifier determined by Intelligent Capture. The default is the image name. |
| 2 | RTS Classname | The project class to which the RTS classified the document |
| 3 | Final Classname | The project class to which a Verifier user classified the document |
| 4 | Link | The link that opens to an image of the document |

| Drill Down | Destination |
|---|---|
| Document No. | The Field Extraction Results |
| Link | The link that opens to an image of the document |

## Classification Summary report

This report displays the percentage of documents correctly classified and the number of documents misclassified for a given date range. The report utilizes the Project Generic Class and Project Generic Parent Class parameters for project that utilized the Supervised Learning Workflow.

| Filter Parameter | Definition |
|---|---|
| Selected Date Range | The start and end dates selected by the user for the report |
| Organization | The organization associated with the documents |
| Project | The project from which the reports are pulling data |
| Client ID | The client documents that should be included in the report results |
| Generic Class | The generic class in the project that is moved to a parent class post extraction. If the documents Generic Class = Parameter Value and Generic Parent Class = Parameter Value, the document is considered classified correctly. |

| Filter Parameter | Definition |
|---|---|
| Generic Parent Class | The parent class in the project to which a generic class document is moved post-extraction. If the documents Generic Class = Parameter Value and Generic Parent Class = Parameter Value, the document is considered classified correctly. |

| | Report Output | Definition |
|---|---|---|
| 1 | Final Classname | The project class that documents belonged to upon export |
| 2 | % Correct | The automatic classification level for a given class |
| 3 | Mis-Classified | The number of documents that were incorrectly classified by RTS |

| Drill Down | Destination |
|---|---|
| Final Classname | The Classification Detail |

## Current Status report

This adhoc report displays a list of documents that are processed for a selected event for the current date and time. You can select the status within Brainware Intelligent Capture as well as a list of all documents in a specific state.

| Filter Parameter | Definition |
|---|---|
| Current State | The field that shows the state of the documents |
| Organization | The organization associated with the documents |
| Project | The project from which the reports are pulling data |
| Client ID | The client documents that should be included in the report results |

| | Report Output | Definition |
|---|---|---|
| 1 | Batch No. | The batch number of the document. |
| 2 | Document No. | The unique document identifier determined by Intelligent Capture The default is the image name. |
| 3 | Import Date | The date on which a document is imported into Intelligent Capture. |
| 4 | Status | The current status of the document. |
| 5 | Export Date | The date on which a document is exported from Intelligent Capture. |
| 6 | Link | The link that opens to an image of the document. |
| 7 | Days in Process | The number of days for which the document is in processing state. |

| Drill Down | Destination |
|---|---|
| Doc No | The Field Extraction Results |

## Document Snapshot report

This is a list of documents processed in a given date range that show the date of import, extraction, and export. You can also click on a link to the document on this page to view it.

| Filter Parameter | Definition |
|---|---|
| Selected Date Range | The date range selected by the user for each report |
| Document Class | The class of the documents, such as invoices, credit memos, remittances, and sales orders |

| Filter Parameter | Definition |
|---|---|
| Organization | The organization associated with the documents |
| Project | The project from which the reports are pulling data |
| Extraction Fields | The fields that should be included in calculating Field Level Extraction |
| Client ID | The client documents that should be included in the report results |

| | Report Output | Definition |
|---|---|---|
| 1 | Document No. | The unique document identifier determined by Intelligent Capture. The default is the image name. |
| 2 | Import Date | The date on which a document is imported into Intelligent Capture |
| 3 | Extract Date | The date on which a document information is extracted with Intelligent Capture |
| 4 | Export Date | The date on which a document is exported from Intelligent Capture |
| 5 | Link | The link that opens to an image of the document |

| Drill Down | Destination |
|---|---|
| Document No | The Field Extraction Report |
| Link | The link that opens to an image of the document |

## Document Throughput Detail report

This report shows the average processing time in hours on the header along with the organization, project, beginning date, and ending date that the user selected as filters. The report displays process start and end times per document while averaging the processing time for all documents in the elected date range.

| Filter Parameter | Definition |
|---|---|
| Selected Date Range | The date range selected by the user for each report |
| Organization | The organization associated with the documents |
| Project | The project from which the reports are pulling data |
| Client ID | The client documents that should be included in the report results |

| | Report Output | Definition |
|---|---|---|
| 1 | Average Process Time | The average time it takes to process a document from start to finish |
| 2 | Document No. | The unique document identifier determined by Intelligent Capture. The default is the image name. |
| 3 | Org ID | The ID number of the organization, such as the company code. |
| 4 | Working Hrs. | The time it took to process a document from start to finish |
| 5 | Process Start | The time at which the document was first imported in to Intelligent Capture |
| 6 | Process End | The time that the document was exported from Intelligent Capture |
| 7 | Link | The link that opens to an image of the document |

| Drill Down | Destination |
|---|---|
| Document No | The Field Extraction Results |
| Link | The link that opens to an image of the document |

## Document Throughput Summary chart

This report displays a pie chart that graphically illustrates the total documents and average processing time to process each document. The top bucket parameter allows you to define the documents you want to group if the processing time exceeds the specified processing time frame. Top bucket defaults to 36 hours; however, it is configurable. If set above 40 hours, the chart converts to a bar chart for easier viewing. You can then drilldown on the specific fields to view the documents.

| Filter Parameter | Definition |
|---|---|
| Selected Date Range | The date range selected by the user for each report |
| Organization | The organization associated with the documents |
| Project | The project from which the reports are pulling data |
| Client ID | The client documents that should be included in the report results |

| Drill Down | Destination |
|---|---|
| Pie Chart | The Document Throughput Detail Report |

## Extraction chart

This is an at-a-glance view of field extraction percentage for user-selected fields by period within defined thresholds of Normal, Warning, and Critical. This information displays as a gauge chart.

| Filter Parameter | Definition |
|---|---|
| Selected Date Range | The date range selected by the user for each report |
| Organization | The organization associated with the documents |
| Project | The project from which the reports are pulling data |
| Extraction Fields | The fields that should be included in calculating Field Level Extraction |
| Client ID | The client documents that should be included in the report results |

## Extraction Chart by date

This is an at-a-glance view of field extraction percentage for user-selected fields with the ability to choose start date and displays if the percentage is within the user-defined ranges of Normal, Warning, and Critical.

| Filter Parameter | Definition |
| --- | --- |
| Search Date | The beginning date used by the Selected Date Range when running the report. |
| Selected Date Range | The date range selected by the user for each report |
| Organization | The organization associated with the documents |
| Project | The project from which the reports are pulling data |
| Extraction Fields | The fields that should be included in calculating Field Level Extraction |
| Client ID | The client documents that should be included in the report results |

## Extraction Performance by Document Class report

This report is the adhoc version of the Extraction Performance by Document Class Report. For each document class, this report shows a statistical summary by percentages that were verified, correct, or not on document, and the percentage of documents with STP for all selected fields. Adhoc reports allow a user to modify the report so that it meets the user's desired style and format, such as re-arrange fields, format fields, show fields that are hidden, and hide fields.

| Filter Parameter | Definition |
| --- | --- |
| Selected Date Range | The date range selected by the user for each report |
| Organization | The organization associated with the documents |
| Project | The project from which the reports are pulling data |
| Client ID | The client documents that should be included in the report results |
| Extraction Fields | The fields that should be included in calculating Field Level Extraction |

| | Report Output | Definition |
| --- | --- | --- |
| 1 | %Verified | The percentage of a specific fields that have been verified |
| 2 | %Correct | The percentage of the fields that have been correctly extracted by Intelligent Capture |

| | Report Output | Definition |
|---|---|---|
| 3 | %Not on Document | The percentage of a specific fields that are not on a document |
| 4 | % STP | The percentage of documents that run straight through |

| Drill Down | Destination |
|---|---|
| Document Class | The Snapshot Class Extraction |

## Extraction Statistics report

This report provides a summary of processing statistics including number of documents and fields processed, percentage of fields verified, correct, and not on document, and the percentage of documents with Straight Through Processing (STP) for today, yesterday, the past 7 days, and the past 30 days. Percent Verified reflects the percentage of fields that stopped in Verifier and required validation based on confidence threshold and required a correction to a field.

| Filter Parameter | Definition |
|---|---|
| Organization | The organization associated with the documents |
| Project | The project from which the reports are pulling data |
| Client ID | The client documents that should be included in the report results |
| Extraction Fields | The fields that should be included in calculating Field Level Extraction |

| | Report Output | Definition |
|---|---|---|
| 1 | %Verified | The percentage of a specific field that has been verified |
| 2 | %Correct | The percentage of the fields that have been correctly extracted by Intelligent Capture |
| 3 | %Not on Document | The percentage of a specific fields that is not on a document |

| | Report Output | Definition |
|---|---|---|
| 4 | % STP | The percentage of documents that run straight through |

## Extraction Statistics by Date report

This report provides a summary of processing statistics including number of documents and fields processed, percentage of fields verified, correct, and not on document, and percentage of documents with Straight Through Processing (STP) for a specified date. Percent Verified reflects percentage of fields that stopped in Verifier and required validation based on confidence threshold and required a correction to a field.

| Filter Parameter | Definition |
|---|---|
| Search Date | The date used when running the report. |
| Organization | The organization associated with the documents |
| Project | The project from which the reports are pulling data |
| Client ID | The client documents that should be included in the report results |
| Extraction Fields | The fields that should be included in calculating Field Level Extraction |

| | Report Output | Definition |
|---|---|---|
| 1 | %Verified | The percentage of a specific fields that has been verified |
| 2 | %Correct | The percentage of the fields that have been correctly extracted by Intelligent Capture |
| 3 | %Not on Document | The percentage of a specific fields that do not appear not on a document |
| 4 | % STP | The percentage of documents that run straight through |

## Field Extraction Exception report

This report is an adhoc version of the Field Extraction Exception Report. Adhoc reports allow a user to modify the report so that it meets the users desired style and format such as rearrange fields, format fields, show fields that are hidden, and hide fields.

| Filter Parameter | Definition |
|---|---|
| Selected Date Range | The date range selected by the user for each report |
| Organization | The organization associated with the documents |
| Project | The project from which the reports are pulling data |
| Client ID | The client documents that should be included in the report results |
| Class Name | The project level classes to be used within the report |
| Extraction Fields | The fields that should be included in calculating Field Level Extraction |

| | Report Output | Definition |
|---|---|---|
| 1 | Document No. | The unique document identifier determine by Intelligent Capture. The default is the image name. |
| 2 | Extracted Value | The value of the field that was extracted |
| 3 | Final Value | The value of the field that has been changed by a verifier |
| 4 | Confidence | The confidence that the extracted field is correct |
| 5 | Distance | The distance that the extracted field is from the next logical choice |
| 6 | Link | The link that opens to an image of the document |

| Drill Down | Destination |
|---|---|
| Document No | The Field Extraction Results |
| Link | The link that opens to an image of the document |

## Field Extraction Exception report

This report provides a lists of all documents in a selected date range where extracted value and final value were different.

| Filter Parameter | Definition |
|---|---|
| Selected Date Range | The date range selected by the user for each report |
| Extraction Fields | The fields that should be included in calculating Field Level Extraction |
| Organization | The organization associated with the documents |
| Project | The project from which the reports are pulling data |
| Client ID | The client documents that should be included in the report results |

| | Report Output | Definition |
|---|---|---|
| 1 | Extracted Value | The value of the field that was extracted |
| 2 | Final Value | The value of the field following modification by a verifier |
| 3 | Confidence | The confidence that the extracted field is correct |

| Drill Down | Destination |
|---|---|
| Document No | The Field Extraction Results |
| Link | The link that opens to an image of the document |

## Field Extraction Results report

The Field Extraction Results Report allows the search for a particular document as it is listed in the database. The report displays the field extraction results for the extraction field names that were selected by the user.

| Filter Parameter | Definition |
|---|---|
| Document No. | The unique document identifier determined by Intelligent Capture. The default is the image name. |

| Filter Parameter | Definition |
|---|---|
| Extraction Fields | The fields that should be included in calculating Field Level Extraction |

| | Report Output | Definition |
|---|---|---|
| 1 | Field Extraction Status | The output that shows if the field extracted was valid or invalid |
| 2 | Detail | The output that shows if the field extracted was automatic, semi-automatic, or manual |
| 3 | OCR Rejected | The output that shows if the field was rejected by the OCR engine |
| 4 | Extracted Value | The value of the field that was extracted |
| 5 | Final Value | The value of the field that was modified by a verifier |
| 6 | No. Of Candidates | The number of potential candidates for a given field |
| 7 | Confidence | The confidence that the extracted field is correct |
| 8 | Distance | The distance that the extracted field is from the next logical choice |

## Field Value Comparison report

This report displays a pie chart, the report details for the extracted value, and the final value for fields where either the extracted value contains the final value or the final value contains the extracted value. Use this information to analyze documents where certain characters were misread through OCR or incorrectly removed, or were included in the final value through project settings.

| Filter Parameter | Definition |
|---|---|
| Selected Date Range | The date range selected by the user for each report |
| Organization | The organization associated with the documents |

| Filter Parameter | Definition |
|---|---|
| Project | The project from which the reports are pulling data |
| Extract Field | The fields that need to should be included in the report. **Note** It is not recommended to use the InvoiceType field within this report as it can skew the results due to the fact the PO vs. NO-PO is always returned from the query. |
| Client ID | The client documents that should be included in the report results |

| | Report Output | Definition |
|---|---|---|
| 1 | Document No | The unique document identifier determined by Intelligent Capture. The default is the image name. |
| 2 | Field Name | The project level field name by which documents are grouped within the report |
| 3 | Extracted Value | The value of the field that was extracted |
| 4 | Final Value | The value of the field that has been modified by a verifier |
| 5 | Link | The link that opens to an image of the document |

| Drill Down | Destination |
|---|---|
| Document No | The Field Extraction Results |
| Link | The link that opens to an image of the document |

## Incorrect Fields Summary report

This report displays a pie chart along with report details for the number of documents that are passed to Verifier for correction or validation. The documents are grouped by the number of fields that a Verifier user needs to correct. The report groups range from 0 fields to 5 fields corrected. The 0 value signals that the document was sent to Verifier for validation logic but the user did not need to change any of the extracted data. Use this report to evaluate business rules and target fields that could improve STP rates.

| Filter Parameter | Definition |
|---|---|
| Selected Date Range | The date range selected by the user for each report |
| Organization | The organization associated with the documents |
| Project | The project from which the reports are pulling data |
| Extraction Fields | The fields that should be included in calculating Field Level Extraction |
| Client ID | The client documents that should be included in the report results |

| | Report Output | Definition |
|---|---|---|
| 1 | Number of Fields Corrected | The number of fields that had to be changed by a Verifier user |
| 2 | Document Count | The number of documents grouped by the Number of Fields Corrected |

| Drill Down | Destination |
|---|---|
| Number of Fields Corrected | The Invalid Fields Count |

## Invalid Fields Count report

This report displays a pie chart along with report details. The number of documents that went to Verifier for correction or validation display based on the number of fields a Verifier user needs to correct. The report allows users to choose from 0 fields to 5 fields corrected where 0 means that the documented was sent to Verifier due to validation logic. However, the user did not need to change any of the extracted data. Use this report to evaluate business rules and target fields for improving STP rates.

| Filter Parameter | Definition |
|---|---|
| Selected Date Range | The date range selected by the user for each report |
| Organization | The organization associated with the documents |
| Project | The project from which the reports are pulling data |

| Filter Parameter | Definition |
|---|---|
| Number of Corrected Fields | The 0 to 5 selection of the number of fields that required manual verification |
| Extraction Fields | The fields that should be included in calculating Field Level Extraction |
| Client ID | The client documents that should be included in the report results |

| | Report Output | Definition |
|---|---|---|
| 1 | Field Name | The project field name that had required verification |
| 2 | Document Count | The number of documents grouped by the Field Name |
| 3 | Document Number | The unique document identifier determined by Intelligent Capture. The default is the image name. |
| 4 | Extracted Value | The value of the field that was extracted |
| 5 | Final Value | The value of the field following verification |

| Drill Down | Destination |
|---|---|
| Document Number | The Field Extraction Results |

## Invalid Reason Detail report

This report lists those documents that were exported with a given invalid reason.

| Filter Parameter | Definition |
|---|---|
| Invalid Reason | The Invalid Reason selected by the user when running the report |
| Selected Date Range | The date range selected by the user when running the report |
| Organization | The organization associated with the documents |

| Filter Parameter | Definition |
|---|---|
| Project | The Intelligent Capture project from which the reports are pulling data |
| Client ID | The client documents that should be included in the report results |

| | Report Output | Definition |
|---|---|---|
| 1 | Invalid Reason | The Invalid Reason description selected for the document |
| 2 | Document No | The unique document identifier determined by Intelligent Capture. The default is the image name. |
| 3 | Link | The link to an image of the document |

| Drill Down | Destination |
|---|---|
| Document No | The Field Extraction Results |
| Link | The link that opens to an image of the document |

## Invalid Reason Summary report

This report lists the number of documents that were exported with an invalid reason where the RTS Invalid Reason value did not match the final Invalid Reason value.

| Filter Parameter | Definition |
|---|---|
| Selected Date Range | The date range selected by the user when running the report |
| Organization | The organization associated with the documents |
| Project | The Intelligent Capture Project from which the reports are pulling data |
| Client ID | The client documents that should be included in the report results |

| | Report Output | Definition |
|---|---|---|
| 1 | Invalid Reason | The Invalid Reason description selected for the documents |
| 2 | # Docs | The number of documents which a Verifier user selected the invalid reason for export |

| Drill Down | Destination |
|---|---|
| Invalid Reason | The Invalid Reason Detail |

## Missing Decimals report

This report displays a pie chart along with report details. This report shows the user selected Amount fields where the only difference between the extracted value and the final value is a decimal place character or a comma character.

| Filter Parameter | Definition |
|---|---|
| Selected Date Range | The date range selected by the user for each report |
| Organization | The organization associated with the documents |
| Project | The project from which the reports are pulling data |
| Amount Fields | The Amount Fields that should be included in the comparison. |
| Client ID | The client documents that should be included in the report results |

| | Report Output | Definition |
|---|---|---|
| 1 | Document No. | The unique document identifier determined by Intelligent Capture. The default is the image name. |
| 2 | Field Name | The project field name which had required verification |

| | Report Output | Definition |
|---|---|---|
| 3 | Extracted Value | The value of the field that was extracted |
| 4 | Verified Value | The value of the field following verification |
| 5 | Link | The line that opens to an image of the document |

| Drill Down | Destination |
|---|---|
| Document No. | The Field Extraction Results |
| Link | The link that opens to an image of the document |

## Page Count report

This report displays the number of documents processed, totals pages processed, and total OCR-ed pages for a given time frame grouped by month.

| Filter Parameter | Definition |
|---|---|
| Selected Date Range | The date range selected by the user for each report |
| Organization | The organization associated with the documents |
| Project | The project from which the reports are pulling data |
| Client ID | The client documents that should be included in the report results |

| | Report Output | Definition |
|---|---|---|
| 1 | Processed Date | The date on which the documents were processed |

| | Report Output | Definition |
|---|---|---|
| 2 | Documents Processed | The sum of the documents processed on a given date |
| 3 | Total Pages | The sum of the pages processed on a given date |
| 4 | Total OCR Pages | The sum of the pages OCRed on a given date |

## Snapshot Class Extraction report

This report displays the Field Level Extraction rates and the percentages Verified for each field in an area chart along with a filterable table of the fields and their Extraction and Verification percentages.

| Filter Parameter | Definition |
|---|---|
| Selected Date Range | The date range selected by the user for each report |
| Organization | The organization associated with the documents |
| Project | The project from which the reports are pulling data |
| Client ID | The client documents that should be included in the report results |
| Class Name | The project level classes to be used within the report |
| Extraction Fields | The fields that should be included in calculating Field Level Extraction |

| | Report Output | Definition |
|---|---|---|
| 1 | Field Name | The project field name |
| 2 | Num of Docs | The number of documents that included the field |
| 3 | % Verified | The percentage of a specific field that has been verified |
| 4 | % Correct | The percentage of time the field was correctly extracted by Intelligent Capture |
| 5 | % Not On Document | The percentage of a specific field that is not on a document |

| Drill Down | Destination |
|---|---|
| Field Name | The Field Extraction Exception Report |

## Snapshot Statistics report

For each document class, this report shows a statistical summary by percentages that were % Verified, Correct, Not on Document, and % of documents with STP (Straight Through Processing) for all of selected fields.

| Filter Parameter | Definition |
|---|---|
| Selected Date Range | The date range selected by the user for each report |
| Organization | The organization associated with the documents |
| Project | The project from which the reports are pulling data |
| Client ID | The client documents that should be included in the report results |
| Extraction Fields | The fields that should be included in calculating Field Level Extraction |

| | Report Output | Definition |
|---|---|---|
| 1 | % Verified | The percentage of a specific field that has been verified |
| 2 | % Correct | The percentage of fields that have been correctly extracted by Intelligent Capture |
| 3 | % Not On Document | The percentage of a specific field that is not on a document |
| 4 | % STP | The percentage of documents that run straight through |

| Drill Down | Destination |
|---|---|
| Document Class | The Snapshot Class Extraction |

| Drill Down | Destination |
| --- | --- |
| Num Docs | The Document Snapshot Report |

## Throughput Summary report

A summary of the number of documents that processed by event type as of the current date and time. It includes the number of documents imported, verified, waiting in Verifier, in process, exported, and voided.

For example, the Verifier count for Today only shows documents verified that were imported today.

| Filter Parameter | Definition |
| --- | --- |
| Organization | The organization associated with the documents |
| Project | The project from which the reports are pulling data |
| Client ID | The client documents that should be included in the report results |

| | Report Output | Definition |
| --- | --- | --- |
| 1 | Imported | The number of documents that have been imported |
| 2 | Verified | The number of documents that have been imported & verified today |
| 3 | Waiting In Verifier | The number of documents that are waiting for a verifier |
| 4 | In Process | The number of documents that are in process |
| 5 | Exported | The number of documents that have been exported |
| 6 | Voided | The number of documents that have been voided |

| Drill Down | Destination |
| --- | --- |
| Event | The Current Status Report |

## Throughput Summary Aging report

This report provides a summary of the number of documents processed by event type and based on the actual date the event occurred.

| Definition |
| --- |
| The organization associated with the documents |
| The project from which the reports are pulling data |
| The client documents that should be included in the report results |

| | Report Output | Definition |
| --- | --- | --- |
| 1 | Imported | The number of documents that have been imported |
| 2 | Verified | The number of documents that have been imported & verified today |
| 3 | Waiting In Verifier | The number of documents that are waiting for a verifier |
| 4 | In Process | The number of documents that are in process |
| 5 | Exported | The number of documents that have been exported |
| 6 | Voided | The number of documents that have been voided |

| Drill Down | Destination |
| --- | --- |
| Event | The Current Status Report |

## Throughput Summary Aging by Date report

This report provides a summary of the number of documents processed by event type for a user defined event date.

| Filter Parameter | Definition |
|---|---|
| Organization | The organization associated with the documents |
| Project | The project from which the reports are pulling data |
| Client ID | The client documents that should be included in the report results |
| Search Date | The beginning date used when running the report. |

| | Report Output | Definition |
|---|---|---|
| 1 | Imported | The number of documents that have been imported |
| 2 | Verified | The number of documents that have been imported & verified today |
| 3 | Waiting In Verifier | The number of documents that are waiting for a verifier |
| 4 | In Process | The number of documents that are in process |
| 5 | Exported | The number of documents that have been exported |
| 6 | Voided | The number of documents that have been voided |

## Throughput Summary by Date report

This report provides a summary of the number of documents processed by event type for a user defined import date.

For example, the verified count for the selected date only reflects verified document that were imported that date.

For activity based on the date the event actually occurred, refer to the Throughput Summary Aging report section.

| Filter Parameter | Definition |
|---|---|
| Organization | The organization associated with the documents |

| Filter Parameter | Definition |
| --- | --- |
| Project | The project from which the reports are pulling data |
| Search Date | The beginning date used when running the report. |
| Client ID | The client documents that should be included in the report results |

| | Report Output | Definition |
| --- | --- | --- |
| 1 | Imported | The number of documents that have been imported |
| 2 | Verified | The number of documents that have been imported & verified today |
| 3 | Waiting In Verifier | The number of documents that are waiting for a verifier |
| 4 | In Process | The number of documents that are in process |
| 5 | Exported | The number of documents that have been exported |
| 6 | Voided | The number of documents that have been voided |

### Intelligent Capture Dashboard

The Intelligent Capture Dashboard enables you to view generated data from different types of Capture reports, simultaneously.

The Capture reports are generated based on the default filter parameters. You can also modify the parameters such as the selected date range, organizations, projects, clients and project level classes, based on which the reports are generated and displayed in widgets on the dashboard.

## Transcripts reports

This section provides a list of transcripts reports available with BIC Visibility as well as the filter parameters and output for each of these reports.

- Average courses per transcript
- Average transcript processing time
- Top 10 transcript institutions
- Total transcripts processed

## Average Courses per Transcript Report

This report displays an average of the total number of courses contained in each processed transcript. You need to specify parameters such as, a selected date range, organizations, projects, clients and project level classes for which you want to generate the report.

| Filter Data Parameters | Definition |
|---|---|
| Selected Date Range* | The start and end dates based on which the report generates data. |
| Organization* | The organization(s) associated with the transcripts, based on which the report generates data. |
| Project* | The project(s) associated with the transcripts, based on which the report generates data. |
| Client ID* | The client(s) associated with the transcripts, for which the report generates data. |
| Class Name* | The project level class(es) associated with the transcripts, based on which the report generates data. |

* Indicates mandatory fields

| Report Output | Definition |
|---|---|
| Courses/Transcript | Displays an average of the total number of courses contained in each processed transcript. |

## Average Transcript Processing Time Report

This report displays an average of the total time consumed (in hours and minutes) in processing a transcript. You need to specify parameters such as, a selected date range, organizations, projects, clients and project level classes for which you want to generate the report.

| Filter Data Parameters | Definition |
| --- | --- |
| Selected Date Range* | The start and end dates based on which the report generates data. |
| Organization* | The organization(s) associated with the transcripts, based on which the report generates data. |
| Project* | The project(s) associated with the transcripts, based on which the report generates data. |
| Client ID* | The client(s) associated with the transcripts, for which the report generates data. |
| Class Name* | The project level class(es) associated with the transcripts, based on which the report generates data. |

*Indicates mandatory fields

| Report Output | Definition |
| --- | --- |
| Average Processing Time (HH:MM) | Displays an average of the total time consumed (in hours and minutes) in processing a transcript, in a gauge graph. |

## Top 10 Transcript Institutions

This report displays the names of the top ten institutions based on the maximum number of processed transcripts. You need to specify parameters such as, a selected date range, organizations, projects, clients and project level classes for which you want to generate the report.

| Filter Data Parameters | Definition |
| --- | --- |
| Selected Date Range* | The start and end dates based on which the report generates data. |
| Organization* | The organization(s) associated with the transcripts, based on which the report generates data. |
| Project* | The project(s) associated with the transcripts, based on which the report generates data. |

| Filter Data Parameters | Definition |
| --- | --- |
| Client ID* | The client(s) associated with the transcripts, for which the report generates data. |
| Class Name* | The project level class(es) associated with the transcripts, based on which the report generates data. |

* Indicates mandatory fields

| Report Output | Definition |
| --- | --- |
| Top 10 Transcript Institutions | Displays a bar chart of the top ten institutions based on the maximum number of processed transcripts. |

## Total Transcripts Report

This report displays the total number of processed transcripts. You need to specify parameters such as, a selected date range, organizations, projects, clients and project level classes for which you want to generate the report.

| Filter Data Parameter | Definition |
| --- | --- |
| Selected Date Range* | The start and end dates based on which the report generates data. |
| Organization* | The organization(s) associated with the transcripts, based on which the report generates data. |
| Project* | The project(s) associated with the transcripts, based on which the report generates data. |
| Client ID* | The client(s) associated with the transcripts, for which the report generates data. |
| Class Name* | The project level class(es) associated with the transcripts, based on which the report generates data. |

* Indicates mandatory fields

| Report Output | Definition |
|---|---|
| Total Transcripts Processed | Displays the total number of processed transcripts. |

### Management Dashboard

The Management Dashboard enables you to view the Average courses per transcript report, Average transcript processing time report, Top 10 transcript institutions report, and the Total transcripts processed report simultaneously.

The reports are generated based on the default filter parameters. You can also modify the parameters such as the selected date range, organization(s), project(s), client(s) and project level class(es), based on which the reports are generated and displayed in widgets.

## Verifier Reports

### Classification Verified by User report

This is an adhoc report that lists the documents verified for classification exceptions by specific users for a project or client and specified date range.

| Filter Parameter | Definition |
|---|---|
| Selected Date Range | The date range selected by the user for each report |
| Organization | The organization associated with the documents |
| Project | The Intelligent Capture Project from which the reports are pulling data |
| User | The Verifier user names who performed classification verification |
| Client ID | The client documents that should be included in the report results |

| | Report Output | Definition |
|---|---|---|
| 1 | Document No. | The unique document identifier determined by Intelligent Capture. The default is the image name. |
| 2 | Original Classname | The document class identified by RTS |
| 3 | Verified | The document class exported |

| | Report Output | Definition |
|---|---|---|
| | Classname | |
| 4 | Import Date | The date on which a document is imported into Intelligent Capture |
| 5 | Extract Date | The date on which a document information is extracted with Intelligent Capture |
| 6 | Export Date | The date on which a document is exported from Intelligent Capture |
| 7 | Time | The time it took to process a document from start to finish |
| 8 | Link | The link that opens to an image of the document |

| Drill Down | Destination |
|---|---|
| Document No | The Field Extraction Results |
| Link | The link that opens to an image of the document |

## Classification Verifier Summary report

This is an adhoc report that displays the number of documents verified for classification exceptions by specific users for a project or client and specified date range in a graphical format.

| Filter Parameter | Definition |
|---|---|
| Selected Date Range | The date range selected by the user for each report |
| Organization | The organization associated with the documents |
| Project | The Intelligent Capture Project from which the reports are pulling data |
| Client ID | The client documents that should be included in the report results |

| | Report Output | Definition |
|---|---|---|
| 1 | Verified By | The Verifiers who verified the identified documents |
| 2 | No of Documents | The number of documents that the Verifier user verified. |

| Drill Down | Destination |
|---|---|
| No of Documents | The Classification Verified By User |

## Docs Processed by Day report

This report displays a line chart that shows the total number of documents, number of verified documents, and number of STP documents by day.

| Filter Parameter | Definition |
|---|---|
| Search Date | The beginning date used when running the report. |
| Organization | The organization associated with the documents |
| Project | The Intelligent Capture Project from which the reports are pulling data |
| Client ID | The client documents that should be included in the report results |

## Extraction Verified by Day by User report

This is an adhoc report that displays a graphical view of the number of documents verified by specific users for extraction exceptions over a 30-day period.

| Filter Parameter | Definition |
|---|---|
| Search Date | The beginning date used when running the report. |
| Organization | The organization associated with the documents |
| Project | The Intelligent Capture Project from which the reports are pulling data |
| Client ID | The client documents that should be included in the report results |

| | Report Output | Definition |
|---|---|---|
| 1 | Export Date | The date the document was exported by Intelligent Capture |
| 2 | User | The Verifier user name who verified the document for extraction |
| 3 | Document Number | The count of documents verified by user for the export date. |

## Extraction Verified by User report

This report is provides a list of documents that were verified for extraction by specific users, including STP (Straight Through Processing), for a given project and date range. Adhoc reports allow users to modify the report so that it meets their desired style and format, such as re-arrange fields, format fields, show fields that are hidden, and hide fields.

| Filter Parameter | Definition |
|---|---|
| Selected Date Range | The date range selected by the user for each report |
| Organization | The organization associated with the documents |
| Project | The Intelligent Capture Project from which the reports are pulling data |
| User | The Verifier user names who performed extraction verification |
| Client ID | The client documents that should be included in the report results |

| | Report Output | Definition |
|---|---|---|
| 1 | Document No. | The unique document identifier determined by Intelligent Capture. The default is the image name. |
| 2 | Vendor ID | The vendor ID number of the company |
| 3 | Import Date | The date on which a document is imported into Intelligent Capture |
| 4 | Extract Date | The date on which a document information is extracted with Intelligent Capture |
| 5 | Export Date | The date on which a document is exported from Intelligent Capture |

| | Report Output | Definition |
|---|---|---|
| 6 | Time | The time it took to process a document from start to finish |
| 7 | Link | The link that opens to an image of the document |

| Drill Down | Destination |
|---|---|
| Document No | The Field Extraction Results |
| Link | The link that opens to an image of the document |

## Extraction Verified Count by Hour report

This adhoc report displays a chart with the number of documents verified for extraction exceptions for a single day broken down by 24 hours.

| Filter Parameter | Definition |
|---|---|
| Search Date | The beginning date used when running the report. |
| Organization | The organization associated with the documents |
| Project | The Intelligent Capture Project from which the reports are pulling data |
| Client ID | The client documents that should be included in the report results |

| | Report Output | Definition |
|---|---|---|
| 1 | Hour24 | The hour in which the documents were verified |
| 2 | User ID | The user name who verified the extracted document |
| 3 | Document Count | The number of documents verified by the user within the hour |

## Extraction Verifier Summary report

This adhoc report displays the number of documents verified by specific users, including Straight Through

Processing (STP) in graphical format. It shows how the verifiers are performing in terms of documents verified. It allows you to see how many documents the verifiers are processing, where they might be struggling with the documents, and if they are meeting their goals. You can then drill down into the Verified by User report to view the documents that each user has processed.

| Filter Parameter | Definition |
|---|---|
| Selected Date Range | The date range selected by the user for each report |
| Organization | The organization associated with the documents |
| Project | The Intelligent Capture Project from which the reports are pulling data |
| Client ID | The client documents that should be included in the report results |

| | Report Output | Definition |
|---|---|---|
| 1 | Verified By | The Verifiers who verified the identified documents |
| 2 | No of Documents | The number of documents that the Verifier user verified. |

| Drill Down | Destination |
|---|---|
| No of Documents | The Extraction Verified By User |

# Data Management

The Archive Reporting Documents report and the Purge Document report should be accessible by the Administrator only.

These reports are installed as hidden reports within the Capture report category and need to be made available by an Administrator prior to running them.

## Purge Document Report

Visibility can optionally be configured to enable purging of reporting documents from the reporting database. This will allow a user role with Organizational Admin privileges to run this report which will permanently remove data from the source Visibility database based on user specified parameters.

**Note:**
This report is not visible by default and you need to perform the following steps to make it available.

1. After logging on to Visibility, use the sliding menu to go to **Navigate > Repository > Manage Categories and Reports**. The Manage Categories and Reports page appears.
2. Double-click the Capture folder and then click Purge Document Report. The Properties area appears.
3. In the Properties area, clear the Hidden check box. The Purge Document Report is available.

| Filter Parameter | Definition |
|---|---|
| Purge Data Before Days | Enter the number of days so that the report will delete the records which are created before the entered number of days from current date. |

## Archive Reporting Documents report

Visibility can optionally be configured to enable data archiving of the reporting database. This will allow a user with Organizational Admin privileges to run this report which will move the data in the reporting database (based on user specified parameters) to an archive database and remove the records from the source Visibility database.

**Note:**
This report is not visible by default and you need to perform the following steps to make it available.

1. After logging on to Visibility, use the sliding menu to go to **Navigate > Repository > Manage Categories and Reports**. The Manage Categories and Reports page appears.
2. Double-click the Capture folder and then click Archive Reporting Documents. The Properties area appears.
3. In the Properties area, clear the Hidden check box. The Archive Reporting Documents report is available.

| Filter Parameter | Definition |
|---|---|
| Purge Data Before Days | Enter a number of days so that report will delete the records which are created before the entered number of days from current date. |
| Number of records | Select a number of records so that report will delete these many records from table |

| Filter Parameter | Definition |
| --- | --- |
| Target DB Name(SQL Server only) | The target database name |
| Target Server Address(SQL Server only) | The target server fully qualified name or ip address |
| DatabaseLinkName(Oracle only) | The database link created for target database |

# Report scheduling activities

Scheduling of reports is very helpful for better utilization of server and printer resources. Reports that take longer to run can be scheduled to save your time. A Report that needs processing of large volumes of data and needs server and printer resources for a long time can be generated over the weekend when the load on servers would be relatively low.

Jobs are the base for running Reports in a timely manner. A job runs a Report that was selected in a task either once or on a regular basis set in a schedule.

To start using the scheduling feature, complete the following steps.

1. Create a new job or make sure an existing job is running. Modify the job if needed.
2. Assign a new or existing task to the job. For scheduling a further report, select the wanted report in the **New Task** form.
3. Select an existing schedule or create a new schedule for the regular iteration of the job.
4. Save the job.

## Jobs

Schedules take care of date and time details of a scheduled report generation. Tasks take care of report output and delivery.

Jobs implement a task (optionally) based on a schedule.

- To configure a new or existing job refer to the Jobs configuration section.
- To create a preconfigured job for a specified report use the **Schedule** function in the **Navigate** menu.

## Job List

This page lists all the jobs that are associated with a schedule for execution. To open the Job list, complete the following steps.

1. Go to the **Navigate** tab in the side menu.
2. Click **Schedule > Jobs**.

### Filter Area

When the page opens, the Filters tab closes. Click the tab-header to open it. The tab-header also displays current filter settings. By default, it displays the first 500 jobs.

The list of jobs can be filtered by the following choices.

- **Job Name Contains.** Any part of the Job Name
- **Report Name.** Name of the report
- **Select Owner.** The user who created the job
- **Show (selecting the number):** Select **Top 100** to view first 100 jobs from the filtered list, and select **Top 500** or **Top 1000** to view first 500 and 1000 jobs respectively. Select **All** to view all the jobs from the filtered list.

  **Note:**
  Jobs are listed in the ascending order of the time of next execution.

### Filter the list

Select or specify filter criteria and click the **Refresh** button. Only entries that meet the filter criteria will appear in the filtered list of tasks.

**Note:**
If you are an Administrator, you can select **Private Owned By = ALL** then click the **Refresh** button to view private Jobs created by all users of your organization.

## List Area

All jobs or jobs that meet the filter criteria are listed in the **List** area.

Use this page to complete the following tasks.

- Add a new job
- Add a new job based on a pre-set job
- Select a job and modify or delete it

If the entity you are looking for is not available in the list, use the drop-down options to view another set of entities.

On multipage job lists click **Next** to go to the next page or **Prev** to go to the previous page.

The **Show** drop-down box that contains the **Next** and **Prev** links displays if:

- it is configured to appear,
- the number of entries is more than the page size, which is set by the application administrator.

The following buttons display in the header row.

| Button | Description |
|---|---|
| Add Job | Set up a new job. |
| Task List | Go to the Task List |
| Schedule List | Go to the Schedule List |

Mark a job and move the pointer over the job name to view the fisheye context menu of the job.

| Menu Option | Description |
|---|---|
| Add Like | Set up a new job based on a pre-set job. The name has Copy Of prefixed to the name of the job being copied. |
| Modify | Make changes to the selected job. |
| Jobs Execution Status | Call up the execution status of the job |
| Delete | To delete a selected job. |

The Job List includes the names of jobs and the following details.

- **Sr.No.** Number of the job
- **Job Name.** Name given to a job
- **Status.** Displays **Running** if the time span of the job is not over, **Completed** if the time span of the task has completed, **Error** if the job started but could not be completed successfully, or **Suspended** if the job is marked as suspended.
- **Last Run time.** Time when the report was run last time.
- **Last Run Result.** Outcome of last run of the job.
- **Frequency.** Frequency of repetition of the calendar.
- **Next Run Time.** Time when the job will next run.

## Add a job

You can create a new job using one of the following methods.

To create a job based on a pre-set, existing job, complete the following steps.

1. Go to **Navigate > Schedule > Jobs** and locate an existing job that you want to duplicate.
2. To select the job, click the button that appears between the first and second column of the respective job entry.

3. Click the **Add Like** button.
4. In the **Job** configuration page, make the necessary changes and save the job under a new name.
5. To create a new job, complete the following substeps.
    1. Click **Add**.
    2. In the **Jobs** configuration page, configure the job settings and click **Save**.

### Modify a job

To modify a job, complete the following steps.

1. On **Job List**page, locate an existing job that you want to modify.
2. To select the job, click the button to the left of the job name.
3. Click **Modify**. You can also click the **Job Name** to modify a job. The **Jobs** configuration page opens for modification of the containing information.
4. In the **Jobs** configuration page, make the necessary changes and click **Save**.

### Delete a job

To delete a job, complete the following steps.

1. On the **Job List** page, select the job that you want to delete. To select a job, click the option button on the left of the job name.
2. Click **Delete**.
3. In the **Delete** dialog box, click **OK** to delete the job.

## Jobs Configuration page

The Jobs Configuration page contains the following elements.

1. Job and Task Details
2. Run
3. Run As
4. Notification
5. Advanced Options

Follow all steps in the following subsections to configure a job.

### Job and task details

1. In the **Name** field, specify a unique name for this entry. This name is used to refer to this job.
2. In the **Choose Task** field, select a task to associate with this job. Click **Modify Task** if you want to modify the selected task. If the task to use is not listed, click **New Task** to create a whole new task to associate with this job.

> **Note:**
> To create a new task, Visibility will take you to the Task configuration page, and return when the task creation is finished. For details on creating a new task, refer to the Add a task section.

If you choose to modify a task,**Visibility** takes you to the **Task** configuration page and back after saving the modified task.

When you choose a task, the report name associated with the selected task automatically appears in **Report Name**.

3. Specify details under **Run**, **Notification**, and **Advanced Options**. The details are provided after these steps. Visibility now starts serving the report based on the job.
4. Optional. If you do not want to implement the job, select the **Suspend** check box. This job remains suspended until the **Suspend** check box is cleared.

> **Note:**
> Information for **Run As**, **Format** and **Delivery** appears from the **Tasks** page.

5. Optional. If you select the **Skip delivery on no data option**, the report is delivered to selected delivery options only if the report has any data. Otherwise, the schedule is skipped.
6. Optional. If you select the **Delete on completion option**, the job is deleted after execution for **Run Now** and **Once**. For **Recurring**, it is deleted if further execution is not scheduled after last execution.

## Run

Select this option to run this job immediately, only once on given date and time, or repeatedly based on a schedule (calendar).

- **Now.** To execute the job now.
- **Once.** To execute the job once, at the specified date and time. Select a **Date**. Specify time in the 24 hour format.
- **Recurring.** To execute the task as per one of the pre-set calendars. Select the calendar from **Schedule (Calendar) List**. Click **New Schedule** to create a new calendar.

## Run As

To run the job in the name of a specific user, select **Organization ID** and **User ID**.

**Important** The **Run As** set value in **Job** overrides the **Run As** set value in **Task**.

## Notification

You can send a notification informing about success or failure of a job.

- **On Success**. To send a notification on success of the job. Select the **On Success, Send Email to** check box and specify the email ID.
- **On Failure**. To send a notification on failure of the job. Select the **On Error, Send Email** check box and specify the email ID.

### Advanced options

These actions are useful when a job cannot be completed.

#### On Error

Define the retry time in relation to the runtime.

- **Minutes.** The number of minutes after which it should be retried.
- **Hours.** The number of hours after which it should be retried.
- **Days.** The number of days after which it should be retried.
- **Retry times.** The number of times it should be retried.

If more than one value is specified, all values are added. For example, retry after 2 days, 4 hours and 10 minutes.

#### On Skip

If the report generation could not start as per the schedule (calendar), such as if the report server was down at the time of executing the schedule, the report is considered skipped. In this case, to recover (to try once again) the schedule (calendar), check the **Recover** check box and specify the time when Visibility should retry the task.

Values can be given in the following formats.

- **Minutes.** The number of minutes after which it should be recovered.
- **Hours.** The number of hours after which it should be recovered.
- **Days.** The number of days after which it should be retried.

### Close the Jobs Configuration page

When the job configuration is completed, click **Save** on top of the page to save the job.

To discard changes, click **Cancel**. If you choose the **Cancel** option, existing jobs remain unmodified, and new jobs are not saved.

The **Jobs** configuration page closes, and the viewer area displays the **Jobs** list with the new job or the modified job selected.

## Jobs execution status

Visibility maintains a list of scheduled jobs. The following information on scheduled jobs appears in the list: Serial Number, Job Name, Report Name, Frequency, Execution Time and Last Run Status.

This history of jobs is listed on the Jobs execution status page. To open this page, complete the following steps.

1. Click **Navigate > Schedule > Jobs Execution Status**.
2. Perform the following actions on this page.
   - Filter the list with the **Filter** criteria on the top foldout menu.
   - View a **Jobs Summary** in the **Jobs Summary** pane.
   - Refer to the **Jobs List** in the **List** area.

## Filters area

When the page opens, the Filters tab remains collapsed. Click the tab-header to open it. The tab-header also displays current filter settings. By default, it displays the first 500 jobs (no filter for report name, Owner Intellica/Admin).

You can filter the list of jobs using the following information.

| Job Filter | Description |
|---|---|
| Select Report(s) | Name of the report |
| Date from / to | Dates between which the jobs were executed |
| Select Owner | Organization and user name of the person who owns the job. |
| Status | Select **Success** , **Failure** , or **All** to include only successful jobs, failed jobs or all jobs respectively. |
| Job Type | Select one of the following job types. Select **All** to include all types of jobs. Select **Now** , **Once** , or **Recurring** to include respective types. Select **Background** to include jobs that run in the background. Select **Post Approval** to include the jobs that executed reports intended to undergo the approval process. |
| Job Name | Name of the job |
| Show (selecting the number) | Select **Top 100** to view the first 100 jobs from the filtered list, and select **Top 500** or **Top 1000** to view the first 500 and 1000 jobs respectively. Select **All** to view all the jobs from the filtered list. |
| Frequency | Select from **Daily** , **Weekly** , **Monthly** , or **All** . |

> **Note:**
> Jobs are listed in ascending order based on the time of execution.

#### Filter the list

Select or specify your filter criteria and click **Refresh**. A list of jobs having entries that meet the filter criteria displays.

### Jobs summary

This displays a graphic summary of the Jobs Execution Status.

### List area

Jobs that meet the filter criteria are listed in **Result** area. The **Show** drop-down box containing the **Next / Prev** link appears if it is configured to appear and the number of entries are more than the page size. This feature is set by application administrator.

If the entity you are looking for is not available in the list, use the drop-down box options to view another set of entities. To retrieve the next list, click **Next**. To retrieve the previous list, click **Prev**.

## Tasks

A report may be printed, mailed, published or uploaded using FTP. It can be generated in different output formats. A task consists of one or more activities that are executed on a report.

As a task, you can instruct BIC Visibility that a report is sent to email addresses, published up to a date, or placed on an FTP site at a certain URL.

## Task list

To view the list of tasks, complete the following steps.

1. Go to the **Job** list.
2. Click the **Task list**  icon in the **Job list** header row.

### Filter area

When the page opens, the Filters tab remains closed. Click the tab-header to open it. The tab-header also displays current filter settings. By default, it displays the first 500 tasks (no filter for report name, Owner Hyland Software/Admin).You can filter the list using the following options.

- **Task Name Contains.** Any part of Task Names
- **Report Name.** Name of the report.
- **Select Owner.** The name of the user who created the task.
- **Show.** Select Top 100 to view the first 100 jobs from the filtered list, and select Top 500 or Top 1000 to view the first 500 and 1000 jobs respectively. Select All to view all the jobs from the filtered list.

### Filter the list

Select or specify filter criteria in the Filters area and click the Refresh button. Those tasks that meet the filter criteria appear on the list.

The list includes the Task number, the Task Selection button, the Task name and the Owner.

**Note:**
If you are an administrator, select All in the Private Owned By selection menu and click the Refresh button to view private tasks created by all the users of your organization.

## List area

All tasks or tasks meeting the filter criteria are listed in the **List** area.

Use this page to complete the following actions.

- Create a new task
- Create a new task based on an existing task
- Select a task (by clicking the radio button) and modify or delete it
- View jobs associated with a task

The Show drop-down box that contains the Next and Prev links displays if it is configured so and if the number of entries are more than the page size (this is set by application administrator).

If the entity you are looking for is not available in the list, use the drop-down box options to view another set of entities. To access the next list, click the Next link. To access the previous list, click the Prevlink.

The following buttons appear in the header row.

| Button | Description |
|---|---|
| Add Task | Create a new task. |
| Job List | Go to the Job list. |
| Schedule List | Go to the Schedule list. |

Mark a task and move the cursor over the job name to view the fisheye context menu of the task.

| Menu Option | Description |
|---|---|
| Add like | Create a new task based on a pre-set task. |
| Modify | Modify a selected task. To modify the task, you can also click the **Task Name**. |
| Associated job list | View jobs associated with their respective tasks. |
| Delete | Delete a selected task. |

### Add a task

To create a new task, complete one of the following procedures.

1. To create a task based on a pre-set (existing) task, complete the following substeps.
   1. In the context menu of the task, click **Add like** to display the **Task configuration** page.
   2. Make changes where required and save the task under a new name.
2. To create a new task from scratch, complete the following substeps.
   1. On the header row of the task list, click **Add Task** to display the **Task configuration** page.
   2. Configure the task and save it.

### Modify a task

To modify a task, complete the following steps.

1. Select a task in the task list.
2. Click **Modify** in the context menu.
3. Make changes to the task and save the task.

### View jobs execution status

- Click the Jobs Execution Status icon in the fisheye menu of the task.

### Delete a task

To delete a task, complete the following steps.

1. Select a task.
2. Click **Delete** in the context menu.
3. Click **OK** in the warning message to permanently delete the task or click **Cancel** to retain the task.

## Task configuration page

The Task configuration page contains the following elements.

Follow all steps in the following sections of the Task configuration to configure a task.

- Task page header
- Operational Parameters
- Report Parameters
- MultiSet Parameters

## Task page header

To define a header for the task page, complete the following steps.

1. In the **Name** field, specify a unique name for this entry. This name is used to refer to this task.
2. In the **Report Name** field, select a report to be taken up for the task.
3. Specify required information for **Operational Parameters** and **Report Parameters** before saving the task.
4. If the report is going to have multiple set of parameters (operational parameters as well as report parameters), specify **MultiSet** parameters before saving the task.
5. Click the **Save** button after specifying all the required information. The task detail is saved and its entry appears on the **Tasks** page.
6. Click **Cancel** to discard changes to an existing task or all information on a new task.
7. Click **Preview** to preview the task report as a PDF.

## Operational parameters

These options deal with the delivery of the report. There are four options: Email, Print, Upload and Publish.

To view the parameters of an option, click the name and then select an option.

### Email

To email a report, complete the following steps.

1. Click the **Send Report As** button.
2. To edit the parameters in the **Message** box, complete the following substeps.
3. In **Send Report As**, select **Link**to send a link of the report. Select **Attachment** to send an entire report as an attachment of the email.
    1. In **File Name**, specify the name for the report that is being attached.
    2. To include date and time of report generation, select the **Suffix Timestamp Format** check box and select a date format.
    3. Specify email IDs for **To**, **Cc** and **Bcc**.
    4. In the **Subject**field, specify the subject of the email.
    5. In the **Message** field, enter your email message.
4. Click **Send**.

### Print

Use this option for reports that are printed on paper. To get print related operational parameters, click the **Print** link and complete the following steps.

1. In the **Copies** field, specify the number of copies to printed.
2. In the **Page Range** field, select **All** to print all pages in the report, or specify the pages to print.
3. Select a printer from the drop-down list. This list has all the printers installed on the **Report Server** machine.

> **Note:**
> - If a print setting is associated with the report, the details display here when you select the report and click the **Go** button.
> - Raw Text output format is not available for Print.
> - For selected reports with a compulsory print setting, you cannot edit the print parameters.

## Upload, save, and publish

You can upload a report to an FTP server or store it in a Shared Folder.

To upload the report to an FTP Server, complete the following steps.

1. In the **Upload Type** field, select **FTP**.
2. To enable FTP, select **Secure**.
3. Optional. To upload in passive mode, select the **Use PASV mode** check box.
4. In the **Server Name** field, specify the server name.
5. In the **Port** field, specify the port to use for the upload.
6. In the **User Name** field, specify the user name to use to log in to the server.
7. In the **Password** field specify the password to use at the time of login.
8. In the **Folder name** field, specify the location of folder where the report should be stored. Specify "/" if you want to place the report at the root directory.
9. In the **File Name** field, specify the name by which the report will be stored on the server.

### Save on a shared folder on the Network

To save a report on a network location, complete the following steps.

1. In the **Upload Type** field, select **Shared Folder**.
2. In the **Folder Name** field, specify the network path in UNC format (\\computername\folder) where you want to place the report.
3. In the **File Name** field, specify the name by which the report will be stored on the server.

### Publish

To publish a report with a preset validity period, complete the following steps.

1. In **File Name**, specify the name for the published report.

2. To include the date and time of report generation, select the **Suffix Timestamp Format** check box and select the date format.
3. For **Valid Upto**, select the right option and provide details accordingly. For details, refer to the following table. Reports expire and are not published after the specified period.

| Report Publishing Option | Description |
|---|---|
| For a specific time period after generation | For example, for 2 months, 3 weeks, 6 hours, and so on.<br>Select this option button and specify the number followed by selecting unit (Hours, Days, Weeks, Months and Years). |
| Up to end of duration from generation | Select this option to keep the report published up to end of duration and select the duration (hours, days, weeks, months and years), for example at the end of this week or at the end of this year. |
| Up to end of a specific time period | Select this option to keep the report published up to a specific date. For example, on 30 July, 2012. |
| Getting parameter value in fields (on E-mail, Publish, and Upload) | You can set parameter value as part of free form entry boxes.<br>To include a parameter in a field, enclose the parameter name in <% and %> and specify in respective entry box.<br>For example, Sales<%CountryCode%>Jan2006. In this example, CountryCode is a parameter name that is replaced by its actual value when the report is executed. |

## Report Format

Select a report format from the drop-down list. **Delivery Options** area just below the **Report Format** drop-down box list properties related to the selected **Report Format**. refer to the online help for details on the **Delivery Options**. Set the properties for the selected **Report Format**.

Report format is available only after selecting **Operations**. Refer to the previous table under **Publish**.

## Run as

To run the task in a specific user's name, select the organization and the user from drop-down boxes under **Run As**.

**Note**

**Note:**
The **Run As** option is available to Administrators only. It is not available to end users with the Scheduler privileges.

## Report Parameters

You can customize the task report parameter based on the report that is used in the task. Configuring the parameters sets the defaults used by the report when the task is executed.

## MultiSet parameters

This is used to provide more than one set of operational parameters and report parameters. This is one of the most powerful features of Brainware Intelligent Capture Visibility. Using Multiset parameters, you can dynamically select the parameter values to use with a report at run time.

The following values are potential Multiset Parameters.

- **Static:** Fix values will be specified for the parameters. These values can be specified on this page.
- **SQL:** SQL query will be used to fetch parameter values from database.
- **XML:** An XML file will provide values to be used as parameters.

### Get parameters values through Static

1. Click the **MultiSet** button under the **Report Parameters** section.
2. Select option **Static**. A check box displays on the left side of both the Operational parameter and the Report parameter.
3. Select the parameters, by checking respective check boxes on **Report Parameters** area, for which you want to provide multiple set of values. Entry boxes, under **MultiSet Parameters**, for selected parameters become available.
4. Click the **Add** button to create an new row.
5. Specify values in respective entry boxes.
6. After providing all the values, click the **Save** button.
7. Optional. Click **Add** to create additional rows. Click × to remove the respective row.
8. Optional. Click **Reset** to reset the values similar to the ones set under operational parameters.
9. Optional. Click **Preview** to have a look at the report based on the parameters set here.

### Getting Parameter values through an SQL

Use this when parameter values needs to come directly from database using an SQL. This way you can dynamically select parameter values at run time.

1. Select the option **SQL**. Select the connection name to be used to get the parameters.
2. Specify the **SQL**.
3. Click **Verify SQL** to check if the SQL you specified is valid.

Getting Parameters through XML

1. Select the option **XML**.
2. Specify URL where the XML is placed.

## About task information without Visibility web interface

Task information that you specify and submit is stored on the server as an XML file. You can download this file and open it using an editor to modify the task information without using Visibility Web Interface. After modification, you can upload it to the server.

### Download the task information

1. On **Task List** page, select the task that you want to download.
2. Click the **Modify** button. The **Task** page opens.
3. Click the **Download XML** button. Click **Save** on the dialog box; specify the location where you want to save the file.

   The file is downloaded. For modification, the file can be opened using any text editor.

### Upload the task information

The file having task information can be uploaded after modification. (You need not upload if it is not changed).

1. Click **Browse** and select the file that you want to upload.
2. Once the file is selected, click **Upload XML** button.

   The file is uploaded to the server.

## Schedules

Schedules can be created by the following roles.

- Administrators
- Users having batch Report Scheduler system privileges
- All users can create private schedules

A schedule includes details of when a report generation task should occur.

## The Schedule List

To view a list of schedules, go to the Job list and click the **Schedule list** icon in the header row.

### The Filter area

When the page opens, the **Filters** tab remains closed. Click the tab header to open it.

The tab header displays current filter settings. By default, it displays the first 500 tasks (no filter for report name, Owner Hyland Software/Admin). You can filter the list using the following options.

- **Schedule Name Contains.** Any part of Task Names
- **Select Owner.** The user who created the schedule(s).
- **Show.** Select Top 100 to view the first 100 jobs from the filtered list, and select Top 500 or Top 1000 to view the first 500 and 1000 jobs, respectively. Select All to view all of the jobs from the filtered list.
- **Filtering the list.** Select or specify filter criteria in the Filters area and click the Refresh button. Those schedules meeting the filter criteria will appear on the list.
- **Administrator.** If you are an administrator, select All in the Private Owned By selection menu and click the **Refresh** button to view private tasks created by all the users of your organization.

## The List area

For each schedule the list includes the Schedule Number, Schedule Name, Owner and Frequency. Click the **Associated Job List** link in a Schedule's context menu to view jobs associated with that schedule.

Use this page to complete the following actions.

- View schedule list.
- Create a new schedule.
- Create a new calendar based on an existing schedule.
- Select a schedule and modify or delete it.
- View jobs associated with a schedule.

### About adding a schedule

You can create a schedule using the following procedures.

- Based on pre-set (existing) schedule
- A new schedule

### Add a pre-set or existing schedule

To add a pre-set or existing schedule, complete the following steps.

1. On the **Schedules** page, select a schedule based on your requirements for a new schedule. To select a schedule, click the option button that appears on the first column of respective schedule entry.
2. Click the **Add Like** button in the context menu of the selected schedule. The **Schedule** configuration page opens in the viewer area.
3. Make the necessary and click **Save**.

### Add a new schedule

To add a new schedule, complete the following steps.

1. Go to **Navigate > Schedule > Jobs** and click the calender icon. The **Schedule** page appears.
2. On the **Schedule** list header row, click the **Add** button. The Schedule configuration page with entry details appears.
3. Configure the schedule as needed and click **Save**.

### Modify a schedule

To modify a schedule, complete the following steps.

1. Select the schedule from the list.
2. Click**Modify** in the fisheye menu.
3. Make changes to the configuration page and click **Save**.

### Delete a schedule

To delete a schedule, complete the following steps.

> **Note:**
> You cannot delete a schedule that is associated with a job.

1. Select a schedule from the list.
2. Click **Delete** in the context menu.
3. Click **OK** in the pop-up message box to delete the schedule, or click **Cancel** to retain the schedule in the list.

### View jobs associated with a schedule

To view jobs associated with a schedule, complete the following steps.

1. Click the **Associated Job List** icon in the context menu of the schedule.
2. The job list that displays contains jobs associated with the selected schedule.

## The Schedule configuration page

To configure a schedule follow all steps in the following subsections.

### Schedule page header

1. In the **Name** field, specify a unique name for this entry. This name will be used to refer to this schedule. This can't be left blank.
2. In the **Start Date** field select the date from which schedule should be implemented. By default, today's date will appear there.
3. In the **End Date** field, select the date from which the schedule would not be available. If this is kept blank, this schedule will never expire and will continue to be available for implementation.
4. Click the **Save** button to save the schedule details.
5. To abandon the process, truncate the changes and return to **Schedules** tab, click the **Cancel** button.

## Select Frequency details

In the **Select Frequency** field, select the frequency. Details are given after these steps. This sets the day on which this schedule will be implemented.

The frequency is set in the following ways.

- Daily (by days)
- Weekly (by weeks)
- Monthly (by months and dates / days within month)

**To set frequency as Daily (by days):**

1. While setting up schedule, under **Select Frequency***,* select **Daily**. The page changes accordingly.
2. Under **Every**, specify the number of days after which the schedule should repeat itself.

For example, if you want the schedule to be repeated once in three days, (1st, 4th, 7th and so on), select 3 as number of days. To repeat the schedule every alternate day, select 2 as number of days. Once a week, select 7 as number of days.

**To set frequency as Weekly:**

1. While setting up schedule, under **Select Frequency**, select **Weekly**. The page changes accordingly.
2. Under **Every**, select after how many weeks the schedule should be repeated.
3. Select the check boxes of the days when you want the schedule to repeat.

For example, if you want the schedule to be repeated every 3 weeks, and to be implemented on Tuesday and Friday, select 3 in the **Every** drop-down and select the appropriate check boxes.

**To set frequency as Monthly (by dates):**

In this case, a schedule is set to repeat on selected months and on specific dates.

1. While setting up schedule, under **Select Frequency**, select **Monthly**. The page changes accordingly.
2. Select the months in which the schedule will be implemented.
3. Select the option **On Selected Date(s)**.
4. Select the dates on which you want the schedule to repeat. For example, if you want schedule to be repeated in April, July, Oct and December on dates 1, 3, 4, 6, 25, select months Apr, Jul, Oct, and Dec. Select dates 1, 3, 4, 6, and 25.

**To set frequency as Monthly (by days):**

Here a schedule is set to repeat on selected months and on a specific day.

1. While setting up schedule, under **Select Frequency**, select **Monthly**. The page changes accordingly.
2. Select the option **On**.
3. Select the required option among 1st, 2nd, 3rd, $4^{th}$, and 5th, followed by selection of day.

4. Select one or more months.
5. For example, if you want the schedule to be repeated every 3rd Friday of January, February, and October, select the months Jan, Feb, and Oct. Select 3rd and Friday as day.

### Selecting Time for implementing the schedule

This is the time when on given day, the schedule should be implemented. It can be made to:

- Occur only once at a specific time on given day
- Occur more than once (at given interval) on given day

**Occur once at**

Select this if you want the schedule to occur only once at a specified time, for example only at 20:00:00.

Click the option button to the left of **Occurs Once at** and specify the time in hh:mm:ss format in the entry box.

**Occurs Every**

Select this if you want the schedule to repeat at an interval of set number of hours.

Click the option button on the left of **Occurs Every** and select a number indicating the number of hours after which the schedule should repeat. Set time for **Starting at** and **Ending at** is the time between which this schedule will occur, for example, **Starting at** 04:00:00, **every 2 hours** until 18:00:00.

# Visibility Dashboards

## Design, View, and Availability

You can design dashboards if you are an end-user or administrator.

| Role | Capabilities |
|---|---|
| End user | Design and use dashboards privately. End-users cannot make the dashboards available to other users. |
| Administrator | Design and use dashboards privately as well as make them available to users of his/her organization (public dashboards) and to all Visibility users. |

For details on the use of the dashboard, refer to the Dashboards section.

## Design a dashboard

Visibility offers a WYSIWYG dashboard designer that allows dashboards to be newly designed and customized so that it will be the most beneficial for end users across the organization.

Design dashboards based on functions within the organization, give the dashboard a meaningful name, decide the layout of the dashboard, and place items to view on the dashboard. The custom designed dashboards make it possible to give your dashboard a unique look and feel.

### Create Dashboards

To create a dashboard, complete the following steps.

1. Go to **Navigate > Dashboards > View**.
2. If your user already has a dashboard selected in **Preferences**, select the grey gear at the top right of the **Dashboard** page and select **Edit Mode**. Otherwise, move to the Add Widget step below.
3. Click the plus **+** symbol to the right of your current dashboard name.
4. A blank dashboard opens in a default style. To add preconfigured widgets to the dashboard, click **Add Widget** in the taskbar.
5. Select an existing dashboard from the categories and drag it to the desired widget location within the dashboard. To create new widgets, refer to the Widget Designer section.
6. Click **Settings** in the taskbar.
7. To configure the properties of the dashboard, select **Dashboard Parameters** and click **Prompt** for the **Input Parameter** form. For details, refer to the Dashboard properties section.
8. Select the **Input Parameters** and click **Run**. For details, refer to the Input Parameter form section. The Widgets show the current report data.
9. Save the Dashboard.

> **Note:**
> Leaving the dashboard view without saving the dashboard discards the dashboard.

## Dashboard Preferences

Specify the dashboards that are displayed upon login and the way that the dashboards are displayed.

Open the Dashboard Preferences page from the side menu: Click **Navigate** > **Dashboards** > **Preferences**.

In the dashboard preferences, you can specify the following options.

- Dashboards that are available for viewing
- The order that the dashboards are displayed in

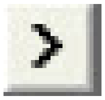
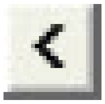
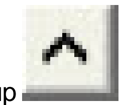
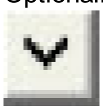
> **Note:**
> To view dashboards owned by other users, check the Show All Owners' check box.

**Dashboard view**

You can setup and view multiple dashboards; however, only one dashboard can be viewed at a time.

Click the tab header of respective dashboard to bring it in front.

### Select dashboard for viewing

1. To shift a dashboard in the **Selected Dashboard(s)** list, complete the following substeps.
    1. In **Available Dashboard(s)** list, browse to a dashboard.
    2. Select the dashboard by clicking on it.
    3. Click the  button. The selected dashboard is moved to the **Selected Dashboard(s)** list.
2. To remove a dashboard from the **Selected Dashboard(s)** list, complete the following substeps.
    1. Select the dashboard from the list.
    2. Click  to remove the selected dashboard.
    3. To remove all dashboards, click **Clear all**.
3. Optional. To change the sequence of dashboard tabs (left to right), Use the up  and down  buttons placed on the right of the **Selected Dashboard(s)** list to move the marked dashboard into another position.

## Manage dashboards

Manage all dashboards in the Explorer. Find the following actions on dashboards in the context menu of each dashboard: **View Dashboard**, **Access Rights**, **Copy/Cut Dashboard**, **Add to Favorites** and **Delete**.

### Access rights to dashboards

This feature is available only to administrators.

To provide access rights for selected dashboard, complete the following steps.

1. Select a dashboard in Explorer.
2. Right-click on the dashboard whose access rights you want to configure and from the menu, select **Access Rights**.
3. Choose a user or user group in the assignee box and set the **Access Rights** for that user/group.
4. Click the **Save** button to save changes.
5. Optional. Click the **Cancel** button to discard all changes.

### Dashboard properties

Set Dashboard Properties in the **Settings** pane and in the **Save Dashboard** dialog.

| Dialog box option | Description |
|---|---|
| Name | Name of the dashboard |
| Description | How you describe the dashboard. |
| Public/Private | Private makes the dashboard only available to you and Public makes it available to everyone. The Public option is only available to the Administrator. |

**Edit pane**

| Dialog box option | Description |
|---|---|
| Properties | Prompt on First Run: This is only applicable when a reports placed on the dashboard have common parameter objects and they are set as dashboard parameters. Refresh Interval: How often all reports within the dashboard will refresh. |
| Layout | Choose a horizontal or vertical layout and number of widgets to display. |
| Information | Shows information which is assigned in the dashboard Saving Options. |

**Dashboard Parameters**

During dashboard design, when a report having user parameters is placed on the dashboard, its parameters are listed on the **Dashboard Parameters** box. When the dashboard has multiple reports with user parameters, some of the parameters may be appearing on multiple reports.

Select parameters from the **Dashboard Parameters** box. Select the **All** check box to include all the parameters on that common parameter entry form. Click **Prompt**. The Input Parameter Form opens.

## Input Parameter form

Configure Report Parameters for dashboards on the **Input Parameter Form**. Reports require run time values for parameters from the user. For example, a monthly sales report may need name of month or a salary slip needs an employee code to generate the respective report. Customize the report parameter based on the reports in the dashboard widgets.

To open the Input Parameter Form for a new dashboard the first time, complete the following steps.

1. Click the **Prompt** button in the **Dashboard Properties** pane.
2. To reenter the Input Parameter Form, pull down the **Parameters** menu to the right of the dashboards name.

3. To configure input parameters, specify the parameters and click **Run** to enable the (new) parameters or click **Reset** to discard changes.

## Widget Designer

The Widget Designer integrates all configuration options for widgets.

1. Go to **Navigate > Design > Dashboard Widget**. The **Widget Designer** page appears.
2. Enter the required information and click the **Save** icon. You can add a new dashboard widget by clicking the **Add** icon.
3. To open and modify an existing widget, click the **Open** icon in the **Widget Designer** or browse for a widget in the Explorer and click the **Edit Dashboard Widget** icon in the context menu.
4. Assign a name for the new widget in the text box next to **Widget Name**.
5. Configure the Widget Properties for each type of widget (for details, consult the next three sections).
6. Optional. To create a widget that is already preset for a specific report, use the **Create Dashboard Widget** icon in the context menu of the report in the Explorer.

### Design a Real Time Report widget

To design a real time report widget, complete the following steps.

1. Next to **Contents**, select the **Report** option.
2. Choose the **Real Time** tab.
3. Select a report in the report browser.
4. Configure the **Widget Properties** listed in the following table.
5. Save the widget or click **Cancel** to exit the design process without saving the widget.

#### Widget Properties

| **Property Name** | **Description** |
|---|---|
| Report Format | Select the output format of the report: HTML, PDF, JVista, iHTML, or SMART. |
| Toolbar | Select the most appropriate option: **Yes** (always show toolbar), **No** (never show toolbar) or **MultiPage** (show toolbar only for multi-page reports). This is applicable to output formats - HTML and Interactive. |
| Ask at Runtime | This option appears when the report placed on dashboard has run time parameters. Select `Yes` to provide parameter values at run time also. Select `No` to provide parameter values only during dashboard designing. |

| Property Name | Description |
| --- | --- |
| Link Widgets | This links any of the charts available on report in this widget to another widget. This allows the user to drill down within the report. |
| Auto Refresh (Yes or No) | Select **Yes**, if you want Brainware Intelligent Capture Visibility to refresh the reports as per the Refresh Interval. Select **No** to view the report generated when dashboard was loaded for the first time. |
| Refresh Interval | Set how often the report are generated, in minutes. |
| Width/Height | Set the width and height of the widget. |

### Link widgets

You can link a report widget (not saved reports) to other widgets. The linked widget may have a report or a web link item.

1. Select a widget to link from.
2. Click the **Link Widgets** button.
3. Choose an item and widget to link to. The widget being linked to needs to have a chart report.
4. Click to get one more row to specify link information with another widget or series. Click to delete a respective row.
5. Click **OK** to apply the link or click **Cancel** to discard the link.
6. Save the widget.

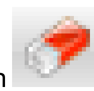
## Design a pre-generated report widget

You can place following items in a Pre-generated widget.

| Item | Description |
| --- | --- |
| Reports | To execute a report when you view the dashboard. Here you select a report layout that will be executed when you view the dashboard. |
| Jobs (Scheduled tasks) | To view reports executed through a job (scheduled task). Here you select a report layout followed by selecting job name through which that report was executed. |

The pre-generated items that appear in the list depend on your logon type. For example, the list is different for an administrator versus an end user.

To configure a pre-generated widget, complete the following steps.

1. Next to **Contents,** select the **Report** option.
2. Choose the **Pre-generated** tab.
3. Select one of the following items:
4. Select a report in the Report browser. This option selects a **Saved Report List**. Select the report to view a corresponding **Saved Report List**.
5. Select a job for the widget. Restrict the choice of jobs to jobs executing a certain report by choosing a report in the Report browser. To undo the restriction click the **Clear** icon  in the **Report** browser.
6. Select a category: This option appears when **Report List**, **Saved Report List** or **Quick Job List** is placed on widget. Select the category to carry out respective task such as retrieve a list of reports in a selected category, retrieve a list of saved reports, or retrieve a quick job lists for selected reports.
7. Configure the widget properties listed in the following table.
8. Save the widget or click **Cancel** to exit the design process without saving the widget.

| **Property Name** | **Description** |
|---|---|
| Report Format | Choose the output format of the report in: HTML*, PDF, JVista, or iHTML. |
| Toolbar | Select the most appropriate one among **Yes** (always show toolbar), **No** (never show toolbar) and **MultiPage** (show toolbar only for multi-page reports). This is applicable to output formats - HTML and Interactive. |
| Instance Navigation | Select **Yes** or **No** . **Yes** displays a drop-down box to select and view one of the saved reports. **No** does not. |
| Auto Refresh | Set this as **Yes** if you want Brainware Intelligent Capture Visibility to refresh the URL as per Refresh Interval. If it is set as **No** , Brainware Intelligent Capture Visibility will execute it only once (when dashboard is brought in front). |
| Refresh Interval | Set the time in minutes. The widget will be refreshed |

| Property Name | Description |
|---|---|
| | at the end of the specified interval. |
| Width/Height | Set the width and height of the widget. |

### Design a web link widget

To design a web link widget, complete the following steps. The following table provides details about the properties you can include in your design.

1. Next to **Contents**, enable the **Web Link** button.
2. Type a URL in the **URL** textbox.
3. Configure the**Widget Properties** listed in the following table.
4. Save the widget or click **Cancel** to exit the design process without saving the widget.

### Pre-generated Widget Properties

| Property Name | Description |
|---|---|
| Show Scrollbar | Select **Yes** to display a scroll bar if the external link page does not fit in widget width. |
| Auto Refresh | Select **Yes** or **No** . **Yes** will refresh the URL at the assigned time interval. **No** will make the URL. |
| Refresh Interval | Set the time in minutes. The URL will be refreshed at the end of the specified interval. |
| Width/Height | Set the width and height of the widget. |

# How to use and manage reports

You can manage reports in the following locations in BIC Visibility.

- Find all Reports. You can save Reports and Report related objects in the Repository tab.
- Find Manage Folders and Reports. You can access these options from the Repository options of the Navigate menu tab.
- Find Report Notification. You can set notifications in the Notify section of the Navigate tab.

## Report explorer

Carry out all report related actions from the Explorer tab of the slide menu.

Click the corresponding link in the context menu of the report to run the selected action. Choose from a wide variety of tasks including running reports, customizing reports, configuring report properties and managing reports.

## Run a report

You can run a report using the options in the report context menu.

- To start a quick run with default options, use **Quick Run with default options**. The **Report Parameters** page displays. Confirm the settings and click **Run Now.**
- To run a report in the background click **Run in Background**. Follow the same actions as in the **Quick Run** procedure.
- To run a report with full control over all settings, click **Run Report**. Select the **Template**, **Report Format**, and the **Filter Criteria** for **Adhoc Reports**, or select the **Report Delivery Options** for all other reports. **Adhoc Reports** also offer a **Preview** function. Decide whether to run the report now or in the background. Then you can configure the Report Parameters and click **Run Now** or **Run in Background**.

To save a report after it runs, click the **Publish Report** icon in the header bar of the report.

Find recently run reports in the **My Reports** page. To open the **My Reports** page, go to **Navigate > Reports > My Reports**.

The published reports appear on the **Published Reports** page that is also opened in the **Published Reports** section of the **Navigate > Reports** tab.

## Customize reports and configure properties

Select Customize Report to open the Adhoc Report Designer for adhoc reports and the Web Studio for all other reports.

**Properties** and **Advanced Properties** open in a pop-up window. Make changes and click **Save** to save the changes or **Cancel** to discard all changes.

## Manage reports

You can manage your report by completing one of the following options.

- Right-click a report in the Repository and select one or all of the following options.
  - Add reports to the **Favorites** list.
  - View the description or download a report.
  - **Copy** or **Cut** reports and **Paste** the report into another category.

    Administrators have the right to delete reports. A warning message prompts you to confirm the deletion.

> **Note:**
> Deleted reports cannot be restored.

## Manage categories and reports

You can manage reports and categories through the Navigate > Repository > Manage Categories and Reports options. Users who do not have Administrator privileges only have access to categories they created.

The top section of managing folders and reports allows the user to work with the folders or categories and create, change the name, or delete a folder or category.

To manage report properties, complete the following steps.

1. Browse to the folder in the drop-down list next to the **Look in** option.
2. Select a report from the available list.
3. View the properties of the selected report below the reports field.
4. Optional. You can configure the Report properties such as Report Name, Design Mode, Public vs. Private availability and the Read Only setting. Additionally, you can configure default parameters that include a default database connection to use for the report, a default output format, and a default printer setting.

   Report Availability Properties include the following options.

   - **Public.** The report is available to all users with access.
   - **Private.** The report is available only to the user who uploads the report.
   - **Hidden.** The report does not display on the report list.
5. Click the **Advanced** button to open the **Advanced** properties window of the report.

## Report notifications

Configure report notifications in the Notify section of the Navigate submenu. The notifications enable you to automatically receive information when pre-set conditions are satisfied. For example, if field level extraction is below a certain threshold, you can trigger a report notification.

There are two options in the Notify section - Subscribe and View Alerts.

- The **View Alerts** section lists all the alerts you selected.
- The **Subscribe** menu option allows you to view the notifications and add subscriptions.

All available notifications display on the left side, subscriptions display on the right side.On the subscriptions side you can edit and unsubscribe the subscriptions and view alerts.

To add a subscription, click the **Subscribe** icon next to the notification name.

For email, the page is divided into the following three sections.

- **Alert Message:** Email message details
- **Alert When:** The time and frequency that the parameter will run. This includes the hour, day of week, week of the month, or month
- **Message Delivery Options**: Who is on the email notification list

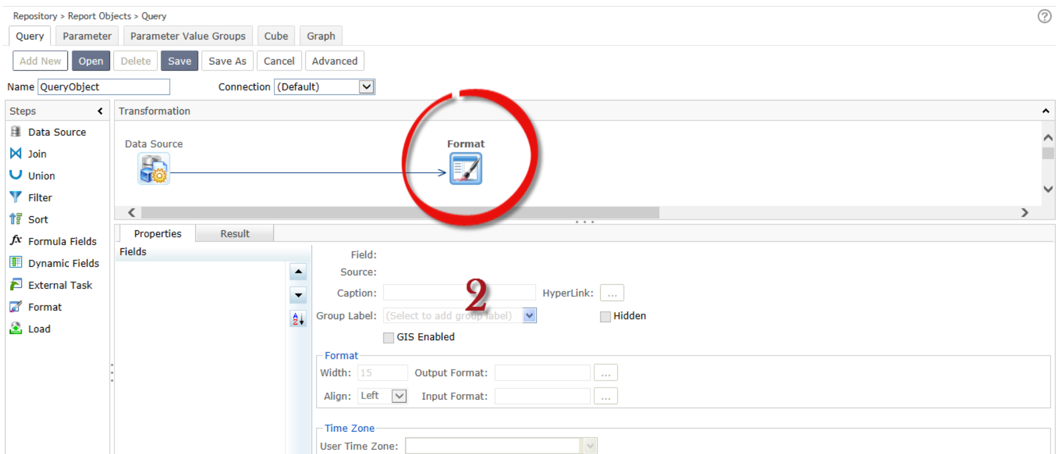
# Customize reports

## Report objects

Report Objects are stored in the Repository. Only users with Administrator privileges can create and edit these objects.

### Query Object Editor

The **Explorer** menu options allow you to view, edit, create, and delete queries for adhoc and studio reports. The **Create Query Object** icon for a new Query Object and the **Edit Query Details** icon for an existing Query object both open the **Query Object Editor**.




The following elements dispay in the **Query Object Editor**.

1. **Connection** and **SQL** properties
2. **Fields** properties

### Connection and SQL properties

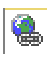
After the query is selected, you can view or edit the **SQL** properties of the query, including the SQL script that runs to execute the query, the connection used by the query, and the fields returned by the query.

> **Note:**
> If there are any scripting errors when executing the query, look in the client logs.

## Fields

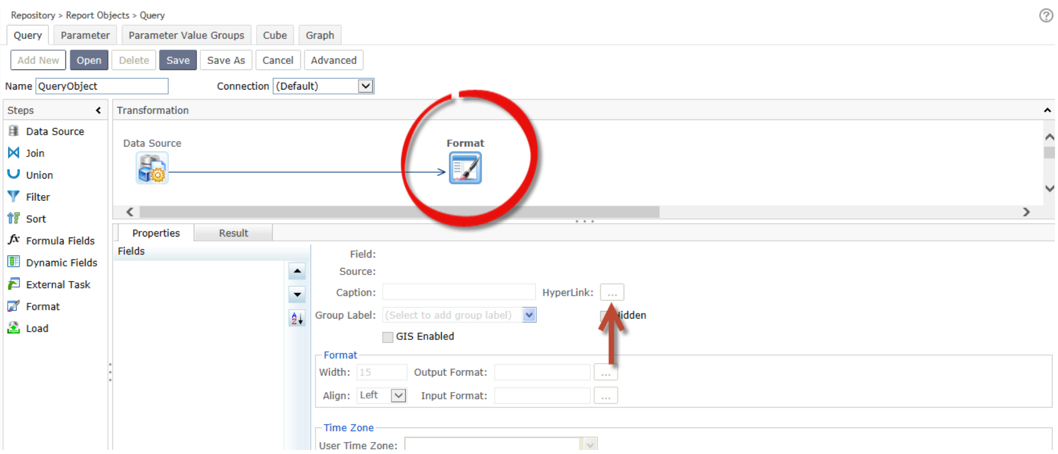
The fields dynamically change based on the query you run. The icons to the left of the field name are a quick way to view the field type. Different properties and lookup values display to the right of the Fields list based on the field type.

For instance, if the field is linked to another field, the hyperLink displays in blue (**HyperLink**) and you can then select the icon to the right of it so that you can make changes in the report that it drills-down to, where the drilldown report displays, and the report parameters. If this same field is a date field, then the icon directly to the left of the field name is a calendar icon.

| Icon | Action |
| --- | --- |
|  | Hyperlinked to Another Report |
|  | User Defined SQL |
|  | Date Data Type |
|  | Number Data Type |
|  | Text Data Type |
|  | User Defined SQL that is Fetched on Every Use |

## Hyperlink reports

1. To add a hyperlink to a report, open a **Query Object** in the **Query Object Editor**.
2. Click **Format** in the **Transformation** pane. Click the **Hyperlink** button.




3. A configuration box displays providing the following options.

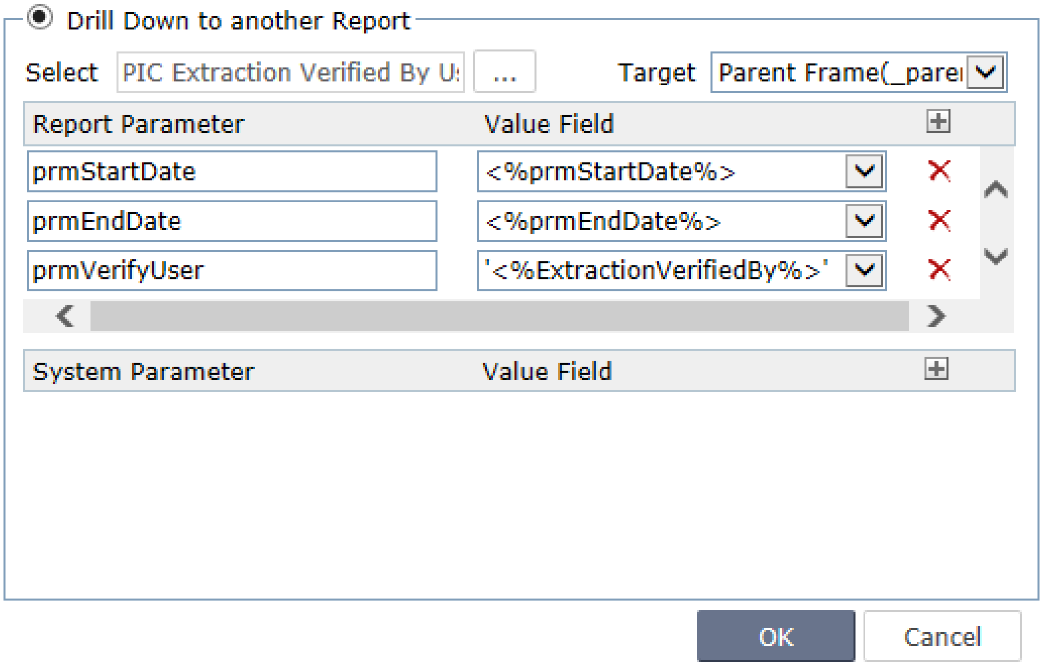
- URL. Refer to the Hyperlink a field to open a specific URL section.
- Drill down to another Report. Refer to the Hyperlink the field to open a specific report section.

## Hyperlink a field to open a specific URL

1. Click the **URL** option.
2. In the box provided below the **URL** button, specify the URL.
3. Click **OK**.


## Hyperlink the field to open a specific report

1. Select on the **Drill down to another Report** option.
2. In **Select** entry box, select the report that should be opened when the hyperlink is clicked.
3. Select the most appropriate option for **Target**. This is the way the report in the hyperlink will open.
4. Specify values for the **Report Parameters** if required.
5. Specify **System Parameter** if required.
6. Click **OK**.




Report Parameter is the parameter in the report being set as hyperlink. Value field is the field within the report that will have a hyperlink.

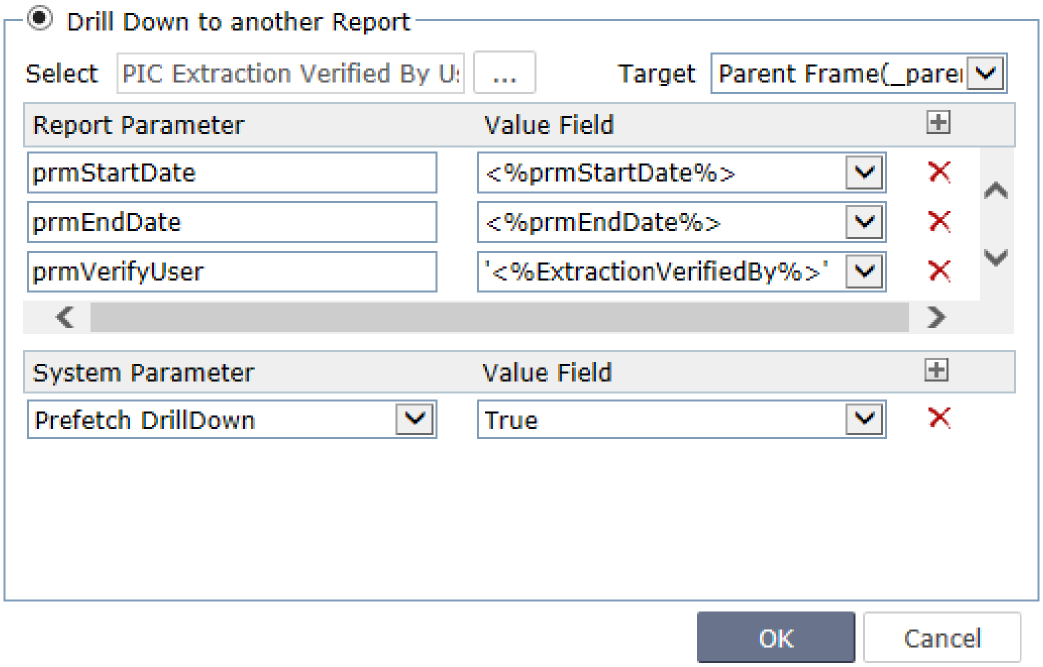
For details on the System Parameters and their values, refer to online help for the Hyperlink options window.

## Prefetch drilldown

On a report, when a user clicks a hyperlink, Brainware Intelligent Capture Visibility starts generating the hyperlinked report (also known as drilldown report) and displays it. For longer child reports, this may take some time.

Use PREFETCH_DRILLDOWN to save time taken for generation of child reports.

When this feature is turned on, Brainware Intelligent Capture Visibility generates a drilldown report (child report) along with the parent report (even if the user has not clicked the hyperlink on the parent report). This way since the hyperlinked report (also known as drilldown report or child report) will be already been generated before the user clicks the link, user will get a much faster response.




## How it works

When a report that has hyperlinked report with Prefetch drilldown = TRUE at the end of the URL, Visibility generates the hyperlinked report and stores the information on the report server in RPG format. When a user clicks the hyperlink on the parent report, Brainware Intelligent Capture Visibility picks up the pre-generated report and presents the report in whichever format the user has requested. This allows for a faster response time.

**Note:**

Note If a parent report is saved (published), all the child reports also are saved for the same time. For example, if a parent report is published up to January 1 2015, all the child reports also are published up to January 1 2015.

If a parent report is only viewed (for example, HTML), all the child reports are generated and saved. However, in this case, they are available only up to the same day at midnight. For example, if a parent report is viewed on May 11 2014, all the child reports are generated and available up to May 11 2014, 11:59:59 pm. Visibility starts the process to delete those reports at midnight.

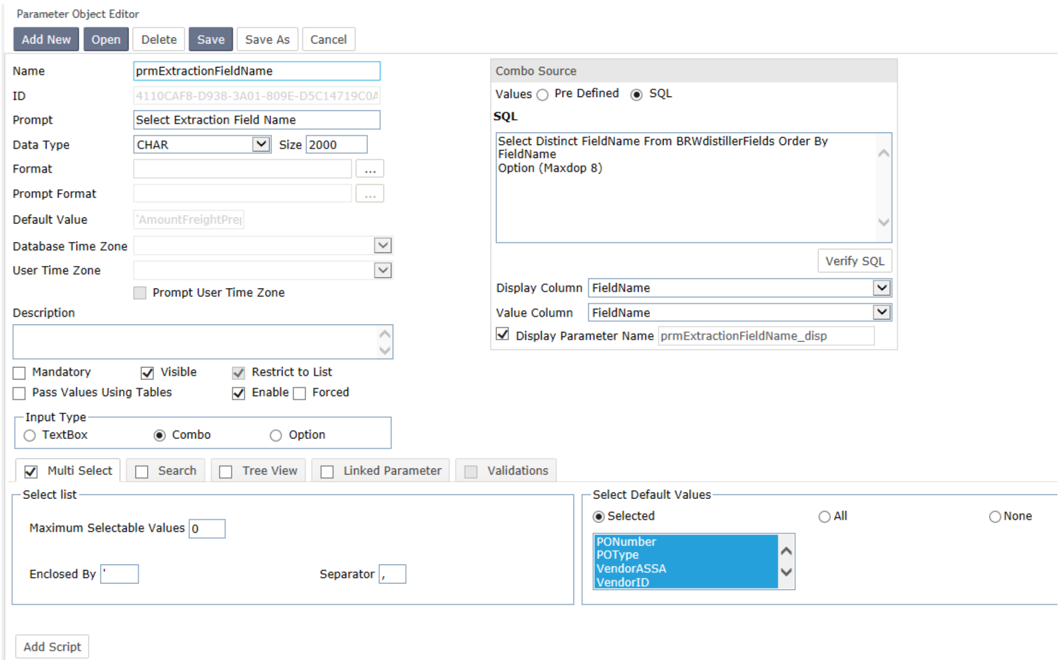
## Parameter Object Editor

On the Parameter Object menu in the explorer, you can add a parameter, edit parameter details, or delete a parameter.

To add a new Parameter Object, complete the following steps.

1. Go to **Explorer > Parameter Objects**.
2. Right-click and select **Create Parameter Object**

3. Configure the new parameter in the **Parameter Object Editor**.
4. To change an existing parameter, complete the following substeps.
   1. Select the parameter from the **Parameter Objects** list.
   2. Click the **Edit Parameter Details** slide menu option.
   3. Configure the properties and input type information in the **Parameter Object Editor**.




## Properties

Set the parameter name, the prompt name, the format of the parameter (general, number, currency, date, time, percentage, scientific, text, Network), size (Brainware recommends that it is set at 2000), format, default value, and description. You can also set the following properties.

- **Mandatory**: If it is mandatory, then a default value must be provided.
- **Visible**: Sets whether a parameter is displayed in the report's parameter list. Clear this check box if they will be passed on by another method, i.e. they are drilled down from another report.
- **Forced**: Values are forced to the specific user or group.
- **Pass Values Using Tables** : Only used when the parameters are very large.

## Input type

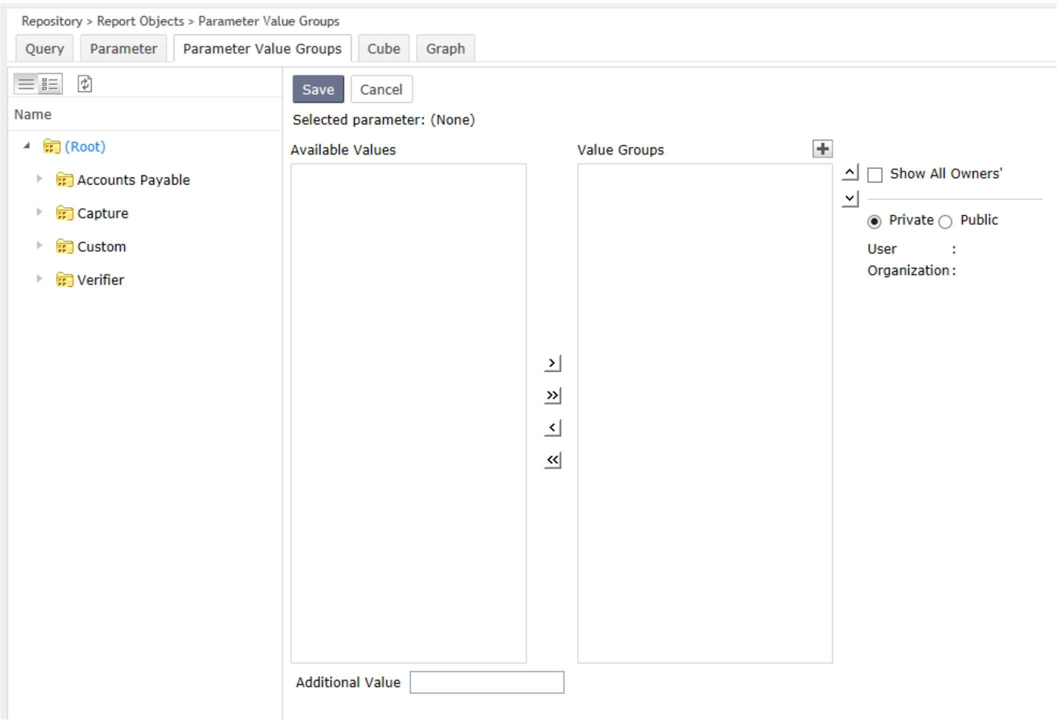
You can set the following input types for your parameter.

- **Textbox**
- **Combo**: If it is a single select parameter, a drop down box is displayed. If it is a Multi Select parameter, a fixed list box is displayed.
- **Option**: Used when you can only choose one at a time
- **Combo Sources**: Pre-defined (they are determined outside of the database, Monday=day 1, Tuesday = day 2) or SQL (can type in SQL script and then click 'verify SQL')
- **Multi Select, Search, Tree View,** and **Linked** are dependent on the other parameters that are chosen, select the tab name from the table then configure the combo source.

## Parameter Value Groups

Parameter value groups, mainly applicable with multi-select and forced parameters, are used when you have a specific requirement where you only use a specific set of parameters. You can then choose the specific parameters that are going to be included so that they are easily available when a user is going to run a report. If required, the users are still able to add other parameters that are not available from the list.

These groups are not overwritten when new CAB files are deployed. Even though the Value Groups may be using a parameter overwritten by the new CAB files, the Value Groups are stored separately from the parameters themselves.



For example, you make groups for the US, Europe, and Management. The prmOrganization parameter values could then be added to their respective groups (US company codes in the US Group, EU company codes in the Europe Group, and all company codes in the Management Group). These groups could then be selected when forcing a parameter values rather than forcing the individual company codes.

### Open the Parameter Value Groups page

To open the **Parameter Value Groups** page, complete the following steps

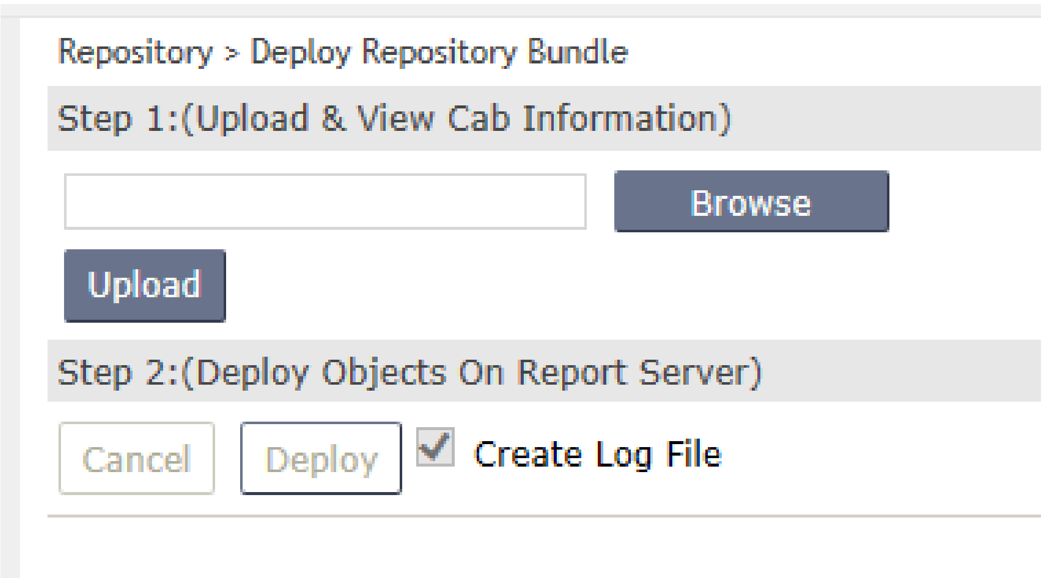
1. Go to **Navigate > Repository > Report Objects**. The **Query Objects** page opens in the viewer area.
2. Select the **Parameter Value Groups** tab.

## Deploy a Report Bundle

Administrator users can deploy repository bundles (CAB/IRB file).

To open the Deploy Repository Bundle page, complete the following steps.

1. Go to **Navigate > Repository > Deploy Repository Bundle**.
2. Open the **Repository** section and click **Deploy Repository Bundle**.




3. To deploy the file, upload the file from its location, and then click the **Deploy** button. If you want to create a log file, make sure that the **Create Log File** is selected.

### Deployment statuses

| Deployment Status | Description |
|---|---|
| Object is updated | The object is presently available and will be replaced by the one being uploaded. |

| Deployment Status | Description |
|---|---|
| Object is not updated | The object is presently available but will NOT be replaced by the one being uploaded. |
| New object | A brand new object is created. |
| Deny deploying | The object was not deployed. |
| Delete Object | The object will be removed from the repository if it already exists. |

# Appendix - Data Tables

## BRWDocument

Stores document header data.

| Column Name | Data type | Description |
|---|---|---|
| DOCUMENTNUMBER | nvarchar (100) | DocumentNumber, assigned during the scanning process. |
| VERSION | nvarchar (10) | Version of the Project File, assigned in the project configuration |
| PROJECTNAME | nvarchar (255) | Project Name, assigned in the project configuration |
| CLIENTNAME | nvarchar (255) | Client Name, assigned in the project configuration |
| CLIENTID | varchar (10) | Client ID, assigned in the project configuration |
| LOCATIONID | nvarchar (50) | Scan Location, assigned from a filename component |
| BATCHNAME | nvarchar (255) | Intelligent Capture Batch Name |
| PROCESS | varchar (255) | Not Used |

| Column Name | Data type | Description |
|---|---|---|
| SEPARATIONPAGE | varchar (255) | Not Used |
| DATESCAN | datetime | Image Scan Date (not populated by Intelligent Capture) |
| USERSCAN | varchar (20) | Username for scanned image (not populated by Intelligent Capture) |
| PCNAMESCAN | nvarchar (40) | Hostname of scanner workstation (not populated by Intelligent Capture) |
| PAGES | integer | Document Total Page Count |
| DPI_X | varchar (5) | X Resolution of image in dots per inch |
| DPI_Y | varchar (5) | Y Resolution of image in dots per inch |
| OCRPAGES | Integer | Number of pages OCR'd |
| OCRREJECTRATE | float | Not Used |
| CLASSNAMERTS | nvarchar (255) | Name of the class selected on the RTS. |
| CLASSNAMEV | nvarchar (255) | Name of the class exported |
| CLASS1NAME | nvarchar (255) | Name of the document classes having the highest classification value |
| CLASS2NAME | nvarchar (255) | Name of the document classes having the second highest classification value |
| CLASS3NAME | nvarchar (255) | Name of the document classes having the third highest classification value |
| CLASS1RESULT | float | Classification value of the document class with the highest value |
| CLASS2RESULT | float | Classification value of the document class with the second highest value |

| Column Name | Data type | Description |
|---|---|---|
| CLASS3RESULT | float | Classification value of the document class with the third highest value |
| CLASS1ENGINE | varchar (255) | Classification engine used to derive the document class with the highest value |
| CLASS2ENGINE | varchar (255) | Classification engine used to derive the document class with the second highest value |
| CLASS3ENGINE | varchar (255) | Classification engine used to derive the document class with the third highest value |
| CLASS1MATRIXROW | varchar (255) | Not Used |
| CLASS2MATRIXROW | varchar (255) | Not Used |
| CLASS3MATRIXROW | varchar (255) | Not Used |
| DATEIMPORTSTARTRTS | datetime | Date and time displaying when the import process for the document was last started. |
| DATEIMPORTENDRTS | datetime | Date and time displaying when the import process for the document last ended |
| DATEOCRSTARTRTS | datetime | Date and time displaying when the OCR process for the document last started. |
| DATEOCRENDRTS | datetime | Date and time displaying when the OCR process for the document last ended. |
| DATECLASSRTS | datetime | Date and time displaying when the Classification process for the document last started. |
| DATECLASSENDRTS | datetime | Date and time displaying when the Classification process for the document last ended. |
| DATEEXTRRTS | datetime | Date and time displaying when the Extraction process for the document last started. |

| Column Name | Data type | Description |
|---|---|---|
| DATEEXTRENDRTS | datetime | Date and time displaying when the Extraction process for the document last ended. |
| DATECLASSV | datetime | Date and time displaying when the Classification verification process for the document last occurred in Verifier. |
| DATESTARTV | datetime | Date and time when the document was last opened in the Verifier application. |
| DATEEXTRV | datetime | Date and time displaying when the Extraction verification process for the document last occurred in Verifier. |
| DATESTARTREVIEW | datetime | Date and time when the document was last opened in the Verifier application by a review user. |
| DATEENDREVIEW | datetime | Date and time displaying when the review verification process for the document last occurred in Verifier. |
| DATEEXPORTRTS | datetime | Date and time displaying when the Export process for the document last occurred. |
| PIDOCRRTS | varchar (10) | Last Process ID on the RuntimeServer during the OCR step. |
| PIDCLASSRTS | varchar (10) | Last Process ID on the RuntimeServer during the Classification step. |
| PIDEXTRRTS | varchar (10) | Last Process ID on the RuntimeServer during the Extraction step. |
| PIDCLASSV | varchar (10) | Last Process ID on the Verifier during the Classification step. |
| PIDEXTRV | varchar (10) | Last Process ID on the Verifier during the Extraction step. |
| PIDREVIEW | varchar (10) | Last Process ID on the Verifier during the Extraction step. |
| PIDEXPORTRTS | varchar (10) | Last Process ID on the RuntimeServer during the Export step. |

| Column Name | Data type | Description |
|---|---|---|
| PCNAMEOCRRTS | nvarchar (40) | Last Hostname of the RuntimeServer during the OCR step. |
| PCNAMECLASSRTS | nvarchar (40) | Last Hostname of the RuntimeServer during the Classification step. |
| PCNAMEEXTRRTS | nvarchar (40) | Last Hostname of the RuntimeServer during the Extraction step |
| PCNAMECLASSV | nvarchar (40) | Last Hostname of the Verifier during the Classification step |
| PCNAMEEXTRV | nvarchar (40) | Last Hostname of the Verifier during the Extraction step |
| PCNAMEREVIEW | nvarchar (40) | Last Hostname of the Verifier during the review step |
| USERCLASSV | nvarchar (20) | Last Username to perform classification verification. |
| USEREXTRV | nvarchar (20) | Last Username to perform extraction verification. |
| USERREVIEW | nvarchar (20) | Last Username to perform verification review. |
| PCNAMEEXPORT | nvarchar (40) | Last Hostname of the RuntimeServer during the Export step |
| FLAGEXPORTED | varchar (1) | Flag indicating whether the document has been successfully exported |
| DMVSDATE | varchar (8) | Not Used |
| DMVSTIME | varchar (6) | Not Used |
| DMVSSTATUS | varchar (1) | Not Used |

| Column Name | Data type | Description |
|---|---|---|
| SOURCE_ID | varchar (20) | Source ID - Vendor, Customer Identifier |
| SOURCE_NAME | varchar (100) | Source Name - Vendor, Customer Name |
| ORG_ID | varchar (20) | Organization ID - Company Code |
| CURRENT_STATUS | integer | Current Document Status |
| ERP_DOC_LINK | varchar (255) | Not Used |
| ERP_DOC_KEY | varchar (255) | ERP Document Identifier |
| ERP_ERROR | nvarchar (255) | ERP Error returned |
| DOCUMENT_LINK | nvarchar (255) | URL or UNC path to Document Image |
| TABLE_ROWS_IN | integer | Number of table rows extracted during RTS Extraction step |
| TABLE_ROWS_OUT | integer | Number of table rows exported during RTS Export step |
| LP STATUS | Integer | An integer ID that is used to reference the status' description from the BRWlpstatus table. i.e. 10 = Line pairing successful, 2 = All PO lines used or deleted |
| LP TOTAL | integer | Total number of lines from the invoice |
| LP PAIRED | integer | Number of lines paired successfully during the line pairing routine. |
| INPUTSOURCE | nvarcher (10) | Document source location such as SCAN, EMAIL, FTP. |

## BRWDistillerFields

Stores Distiller extracted fields. Each field is stored in an individual row.

| Column Name | Data type | Description |
|---|---|---|
| DOCUMENTNUMBER | nvarchar (100) | DocumentNumber assigned during the scanning process. |
| FIELDNAME | varchar (50) | Distiller field name |
| STATUS | varchar (50) | Field State following RTS Extraction Step - VALID or INVALID |
| DETAIL | varchar (50) | Field State detail following RTS Extraction Step. Automatic - Field is valid; Semi-Automatic - Field is invalid and populated; Manual - Field is invalid and empty |
| OCRREJECTS | integer | Number of characters in the field text identified as rejects by the OCR engine |
| CONTENTRTS | nvarchar (255) | Field content following the RTS extraction step |
| CONTENTV | nvarchar (255) | Field content following the RTS export step. Fields changed by Verifier can be identified by comparing CONTENTRTS to CONTENTV |
| CONTENTREVIEW | nvarchar (255) | Field content following the verifier review step |
| NOOFCANDIDATES | integer | Number of field candidates identified by the analysis engine |
| CONFIDENCE | float | Confidence of the highest weighted field candidate |
| DISTANCE | float | Distance between the confidence of the highest weighted candidate and the second highest candidate. |

## BRWDocStatusDesc

Description for Distiller document statuses.

| Column Name | Data type | Description |
|---|---|---|
| ID | integer | Document Status Identifier (BRWDOCUMENT.CURRENT_STATUS) |
| DESCRIPTION | varchar(100) | Document Status Description |

### BRWDocStatus

Audit Trail for document statuses.

| Column Name | Data type | Description |
|---|---|---|
| DOCUMENTNUMBER | nvarchar(100) | DocumentNumber assigned during the scanning process. |
| STATUS | integer | Document Status |
| STATUSDATE | datetime | Date and Time document arrived at the state |
| STATUSDESC | varchar(255) | Not Used |

### BRWDocImage

Document Images (only populated when REP_OP_StoreImageInReportingTables INI file option is set to YES.)

| Column Name | Data type | Description |
|---|---|---|
| DOCUMENTNUMBER | nvarchar(100) | DocumentNumber assigned during the scanning process. |
| DOCUMENTIMAGE | varbinary(max) | Document Status |

### BRWlpstatus

Audit Trail for line pairing statuses.

| Column Name | Data type | Description |
|---|---|---|
| ID | integer | Line pairing status identifier |
| DESCRIPTION | Varchar(100) | Description of the line pairing results |

# Frequently Asked Questions (FAQ)

This section contains frequently asked questions and solutions to them.

**The Project Parameter value is not updated when the reporting database is changed. The Organization and User/Role values under Manage Users are also not updated and continue to display old values.**

Steps to Resolution:

1. Go to **Navigate > Administration > Manage Users > Organization > Modify**.
2. Click the Preferences tab and from the Select Database list, select the new database you want to use.
3. Click Save. The details are saved.
4. Click the Data Restriction tab and in the Selected Values area select the values you want to remove and click **<**.
5. On the User/Role tabbed page, select Admin and then click Data Restrictions.
6. Include relevant value(s) from the Available Values box to the Selected Values box.
7. Click Save. The details are saved.

**What is the best practice to be followed while generating reports?**

You need to ensure the following:

1. The correct database is selected in **Settings**.
2. The **Also save in preferences** check box is selected in **Settings**.
3. Go to **Administration > User management > Organization > Modify** and change the database in preferences
4. In the **Data restriction** tab, remove the old project name from the **Selected values list** and add the new project name from the **Available values** box to the **Selected values** box.
5. Go to the **User/Role** tab and click **Admin > Data Restriction**
6. Repeat step d and then run the report.