Capture and Indexing

User Guide

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HYLAND™

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Capture and Indexing overview

Capture and Indexing provides the ability to capture and index items in a customizable workflow in Perceptive Content.

The application allows you to scan items into folders or batches. The batch capture process gives you the ability to distribute the steps required to process a batch of files among multiple roles in your organization. Once the capture process is complete, you can review, index, and validate the captured documents. Documents can be indexed using metadata, including specific item information retrieved from the database at the time of capture or thereafter.

Show or hide views list

To show or hide the views list in the left pane, complete the following step.

- From the main workflow view, click Show or Hide Views List.

View documents as thumbnails

To view documents in the left pane as thumbnails, complete the following step.

- In an open batch, click Thumbnail View.

View documents in list view

To view documents in the left pane in a list view, complete the following step.

- In an open batch, click List View.

Show or hide properties

To show or hide document, custom and page properties, complete the following step.

- In an open batch, click Show or Hide Properties.

Edit a batch property

To edit a property for a batch, complete the following steps.

1. In an open batch, click **Show or Hide Properties**.

2. Under **Document Properties**, **Custom Properties**, **Notes** or **Page Properties**, edit the information in the appropriate field.
3. Click **Save** to save the changes.

Edit a batch description

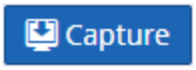
To edit a batch description, complete the following step.

- In an open batch, in the Description field, enter a description for the batch.

Capture a batch

Capture and Indexing lets you capture physical documents using a scanner or capture files from your file system into a batch. To capture a batch of documents, complete the following steps.

Prerequisite If you are scanning a physical document, verify that your scanner is powered on and the document is ready to scan.

1. In the **Batches** view, click 

.
2. In the **Capture and Indexing** dialog box, in the **Capture profile** list, select a capture profile.
3. In the **Origin** list, select an originating department.
4. Specify any additional capture parameters required by the capture profile you selected, and then click **Start**.
5. If prompted, in the **Source** dialog box, select the capture source and click **OK**.
6. If you are capturing files from your file system, in the **Select Files** dialog box, click **Browse** to select the files you want to capture, or drag and drop the files into the dialog box.
7. Click **Done**.
8. Optional. In the **Capture and Indexing Status** dialog box, click **Open Batch** to add information, replace pages, and insert pages to the batch.

Add a page to a document

To add a page to a document, complete the following steps.

1. In an open batch, select a page thumbnail and click the **Capture** button .
2. In the **Add pages** dialog box, in the **Capture profile** list, select a capture profile.

   Note: Verify that your scanner is powered on and the document is ready to scan.

3. Perform one of the following actions.
   - To replace the thumbnail you selected, under **Method**, click **Replace**.

- To insert pages before the thumbnail you selected, under **Method**, click **Insert Pages before**.
- To insert pages after the thumbnail you selected, under **Method**, click **Insert Pages after**.

4. Click **Start**.
   The thumbnails pane updates.

Split a document

You can split a multi-page document into multiple documents and choose which properties to retain from the existing document. To split a document, complete the following steps.

1. In an open batch, in the thumbnails or list view pane, locate the pages you want to use to create a new document.
2. Complete one of the following procedures.

Option	Step
Split a single page	Select the pages you want to use for the new document, and in the toolbar, click **New from Selected**. **Note:** The new document retains the document type and properties of the document from which it was removed.
Split a series of pages	Select the page below the pages you want to use for the new document, and in the toolbar, click **Split Above**.

3. If you split a series of pages, select one of the following options.

Option	Description
Clear document type and index keys	Moves all pages above the selected page to a new document and clears the index keys.
Keep document type	Moves all pages above the selected page to a new document containing the selected doc type and properties.
Keep index keys	Moves all pages above the selected page to a new document and retains the index keys.
Keep document type and index keys	Moves all pages above the selected page to a new document containing the selected document type and properties, and retains the index keys.

Result If you select New from Selected, the pages above the selected page are moved to a new document and focus is placed on the new document.

Save a document or a batch

To save a document or batch, complete the following step.

- In an open batch, click Save.

Show or hide annotations

To show or hide annotations, complete the following step.

- In an open batch, click Annotation Page and then select Hide Annotations.

Add an annotation to a document

The annotation tool lets you place an annotation on a document. To add an annotation to a document, complete the following steps.

1. In an open batch, click **Annotate Page** and then select **Create Annotation**.

   Note:
   You can also quickly select the appropriate annotation from the batch toolbar.

2. Place the annotation box where you want the annotation to display on the document.
3. Under **Annotation Type**, select one of the following annotations.
   - Arrow
   - Check
   - Highlight
   - Line
   - Oval
   - Pen
   - Picture Stamp
   - Rectangle
   - Sticky Note
   - Text
   - Text Stamp
   - URL
4. Under **Annotation Template**, select an annotation template.
5. Click **Add**.

Edit an annotation on a document

The annotation tool lets you edit an annotation on a document. To edit an annotation on a document, complete the following steps.

1. In an open batch, select a page in the document with an annotation.
2. In the viewer, select an annotation, click .
3. Update the annotation and click **OK**.
4. Click .

Delete an annotation on a document

The annotation tool lets you delete an annotation on a document. To delete an annotation on a document, complete the following steps.

1. In an open batch, select a page in the document with an annotation.
2. In the viewer, select an annotation and click .

View annotation properties on a document

The annotation tool lets you view the annotation properties on a document. To view the annotation properties on a document, complete the following steps.

1. In an open batch, select a page in the document with an annotation.
2. In the viewer, select an annotation, and then click .
3. The system displays the following property information.
   - **Created**
   - **Created By**
   - **Modified**
   - **Modified By**
   - **Type**
   - **Template**
   - **Description**
4. Click **OK**.

Copy a page

You can copy pages within the same document or to a new document. To copy a page, complete the following steps.

1. In an open batch, in the thumbnails or list view pane, click the page you want to copy. You can select multiple pages.
2. Click **Copy** and then select one of the following options.

Option	Description
Clear document type and index keys	Moves all selected pages to a new document and clears the document type and index keys.
Keep document type	Moves all selected pages to a new document containing the selected doc type and properties.
Keep index keys	Moves all selected pages to a new document and retains the index keys.
Keep document type and index keys	Moves all selected pages to a new document containing the selected document type and properties, and retains the index keys.

Rotate a page

You can rotate selected pages in the thumbnails pane. You can rotate only images in TIFF format. To rotate a page, complete the following steps.

- In an open batch, in the thumbnails or list view pane, select one or more page and perform any of the following actions.
  - To rotate the page 90 degrees to the right, click Rotate Pages and then select Rotate Right.
  - To rotate the page 90 degrees to the left, click Rotate Pages and then select Rotate Left.
  - To rotate the page 180 degrees, click Rotate Pages and then select Rotate 180 Degrees.

Print a document

To print a document, complete the following steps.

1. In an open batch, click **Print**.
   A new tab containing print options opens in your web browser.
2. Select the appropriate print settings and preferences and click **OK**.

Delete a page

You can delete one or more pages from the thumbnails pane. To delete a page, complete the following steps.

1. In an open batch, in the thumbnails or list view pane, click the page you want to delete. You can select multiple pages.
2. Click **Delete**.

Rearrange pages within a document

You can move pages within the same document or across multiple documents. To rearrange a page, complete the following steps.

1. In an open batch, in the thumbnails or list view pane, click the page in the document you want to move.

   Note: To select multiple pages, click the first page, press and hold the `CTRL` key, and click the additional pages.

2. Perform one of the following actions.
   - To move the page within the same document, drag and drop the page to the desired location within the document.
   - To move the page to another document, drag and drop the page to that document.

Select all pages in a document

You can quickly move large numbers of pages within a document. To select all pages in a document, complete the following step.

- In an open batch, in the thumbnails or list view pane, click the area above the pages you want to select.

Use zoom

You can zoom in or out of a page in any image document with the extension of BMP, JPG, PDF, PNG, or TIFF. To use zoom functionality, in the viewer, complete the following steps.

1. In an open batch, in the thumbnails or list view pane, navigate to the page you want to view.
2. On the toolbar, perform any of the following actions.
   - To zoom out, drag the zoom slider to the left or select **Zoom Out** .
   - To zoom in, drag the zoom slider to the right or select **Zoom In** .
   - To adjust the page to the width of the pane, select **Fit to Width**.
   - To adjust the page to the height of the pane, select **Fit to Height** .

- To find optimal fit, select **Best Fit** .
- To view the original size of the image, select **Original Size** .
- To use the lasso zoom feature, press CTRL and select the area you want to magnify. This feature magnifies the selected area of a page and enhances the image size to fit the screen.

Note: If you reduce the size of the window so that the slider does not appear, select the zoom drop-down and then select the zoom slider or an available size option. The drag and zoom action is currently not available on tablets.

Download a page

To download a page, complete the following step.

- In an open batch, in the thumbnails or list view pane, select the page of the document you want to download and then click Download .

Types of searches

Search allows you to define multiple constraints to filter documents, folders, tasks, or workflow items in the current view and returns the results that satisfy any or all of the defined conditions. After you define the search constraints you want to apply, you can group the constraints, reorder the constraints, and save the search criteria as a filter. The options in the field list vary depending on which module you are using. The options in the operator list vary depending on which field you select. You can use the following search types in Perceptive Experience.

Normal constraint search

A normal type constraint allows you to search on a static value that you define when creating the constraint. The view only returns the results that satisfy that constraint.

For example, when you create a normal type constraint on the document field Type, select the operator equal to and then type the value `Invoice`, the system only returns documents that have a document type of invoice.

Variable constraint search

A variable type constraint allows you to use a variable value, such as the current user or current date and time, instead of a static value. You can specify a user or date variable for any search constraint that could use a date or user variable as a value.

For example, when you create a variable type constraint on the document field Created by, select the operator equal to and then select the value Current user's user name, the system only returns documents created by you.

Prompted constraint search

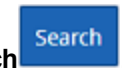
A prompted type constraint allows you to enter a value when running the view. When you run a view, the system displays a dialog box allowing you to enter the value you want to search for. The view only returns the results that satisfy the constraints with the value you entered in the prompt dialog.

For example, when you create a prompted type constraint on the folder fieldfolder status and select the operator equal to, you can then search for folders by selecting either Active or Inactive from a drop-down list in the prompt dialog. You can re-run the searches and change the prompt value at any time.

Search for an item

To create a search constraint and search for a document, folder, task or workflow item, complete the following steps.

1. In the **Views** pane, select the view you want to use as a basis for your search.
2. To create a normal or variable constraint, complete the following sub-steps.
    1. Click anywhere in the **Search in <View_name>** box located to the left of the **Search**

button.
    2. Under **Add Constraint**, in the constraint type list, select **Normal Constraint** or **Variable Constraint**.
    3. In the **Field** list, select the field to use.
    4. If you selected a composite property from the **Field** list, then select a value from the **Custom Property** list.
    5. In the **Operator** list, select an operator to use in the comparison.
    6. For normal constraints, in the **Value** box, select or type a value. For variable constraints, in the **Value** list, select a value.
    7. Click **Add** to complete the constraint.
    8. Click **Search** 

. The system returns the appropriate search results.
3. To create a prompted constraint, complete the following sub-steps.
    1. Click anywhere in the **Search in <View_name>** box located to the left of the **Search**

button.
    2. Under **Add Constraint**, in the constraint type list, select **Prompted Constraint**.
    3. In the **Field** list, select the field to use.
    4. If you selected a composite property from the **Field** list, then select a value from the **Custom Property** list.
    5. In the **Operator** list, select an operator to use in the comparison.
    6. In the **Message Input** box, type a message to display in the prompt dialog.
    7. Click **Add** to complete the constraint.

8. Click **Search**

.
9. In the **<Prompt_Name>** dialog box, select or enter the appropriate search value.
10. Click **OK**. The system returns the appropriate search results.

See the list below for more search constraint options.

- Constraints that have not been run are outlined with a dashed border.
- To edit a constraint, select the constraint and update the necessary parameters.
- To change from an AND to an OR constraint statement, click **AND**. Click **OR** to change it back to **AND**.
- To use multiple constraints in a single search, click and repeat the steps to create a constraint.
- After you define the search constraints you want to apply, you can group the conditions, reorder the conditions, and save searches performed with the search as a filter. The search evaluates the conditions in the order in which you define them. You can save a multiple condition search as a filter.

Create a private filter

A private filter is saved search criteria that is accessible to you. To create a private filter, complete the following steps.

Note that when creating a new private filter, the system does not save column sorting and ordering.

1. In the **Views** pane, select the view you want to use as a basis for your filter.
2. In the right pane, define your quick search or create conditions for a search.
3. If the search returned the results you want, in the **Current View** toolbar, click **Create New Filter** . If not, refine your search and then repeat this step.
4. In the **Create Filter** dialog box, type a name and an optional description for the filter and then click **OK**.

   After you save the private filter, it appears below the view you used to create it in the **Views** pane.

Modify or rename a private filter

You can change the name and description of a saved search filter or the conditions associated with the filter. To modify a private filter, complete the following steps.

1. In the **Views** pane, select the view associated with the filter and then select the appropriate filter.
2. In the **Search** box, modify the necessary components of the condition and then click **Save Filter** .
3. Optional. In the **Save Filter** dialog box, in the **Name** and **Description** boxes, update the name and description of the filter.
4. Click **OK**.

Delete a private filter

To delete a saved search filter, complete the following steps.

1. In the **Views** pane, select the view that contains the filter you want to delete and then select the appropriate filter.
2. Click **Delete Filter**.
3. In the confirmation dialog box, click **Yes** to confirm the deletion of the filter.