Capture Process Properties, Variables, and Capture Activities

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Training Scenario

- XYZ Bank offers **Personal Loans** to customers

- A Customer submits a paper based loan application:

- To date in the training you have created a Business Process to:
  - **Capture** Documents (in this training course using a web front end)
  - Separate based on single page documents

- You now need to:
  - Configure the **Process Capture Properties** to use the objects you created in the previous modules
  - **Build Forms** for the process to allow users to scan and take manual activities
  - **Train** the system to **Classify** (recognise) documents and **Review** classification results
  - **Train** the system to **Extract** document data and **Validate** extracted data

Training Scenario – Sample Application Document

Hand printed

Scan Create New Job Form

Create a Capture Process (Business Process)

Scan create new job form connected to process. Process properties are read from process and determine the separation profile and whether it is a scan enabled process (a folder variable is required).
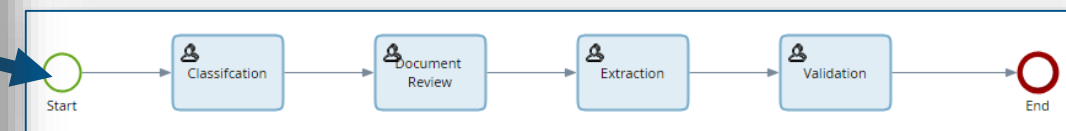
Folder Initialization Variable determines Folder type that is created

Folder

Consume classification group

Initialize from Scan
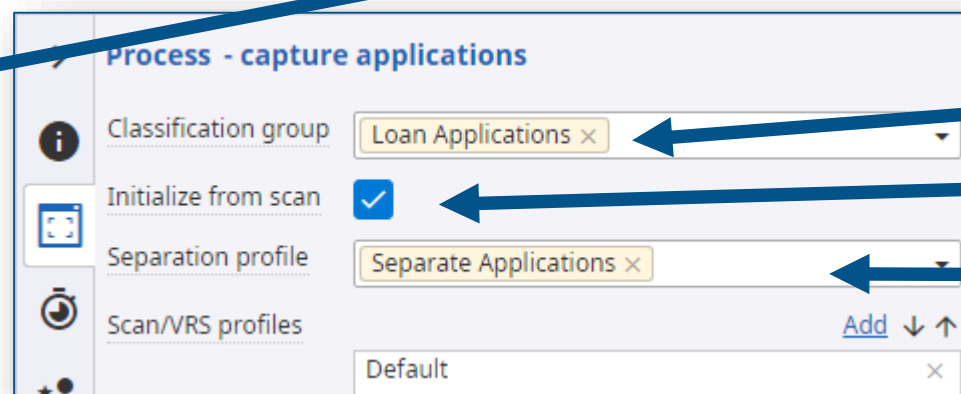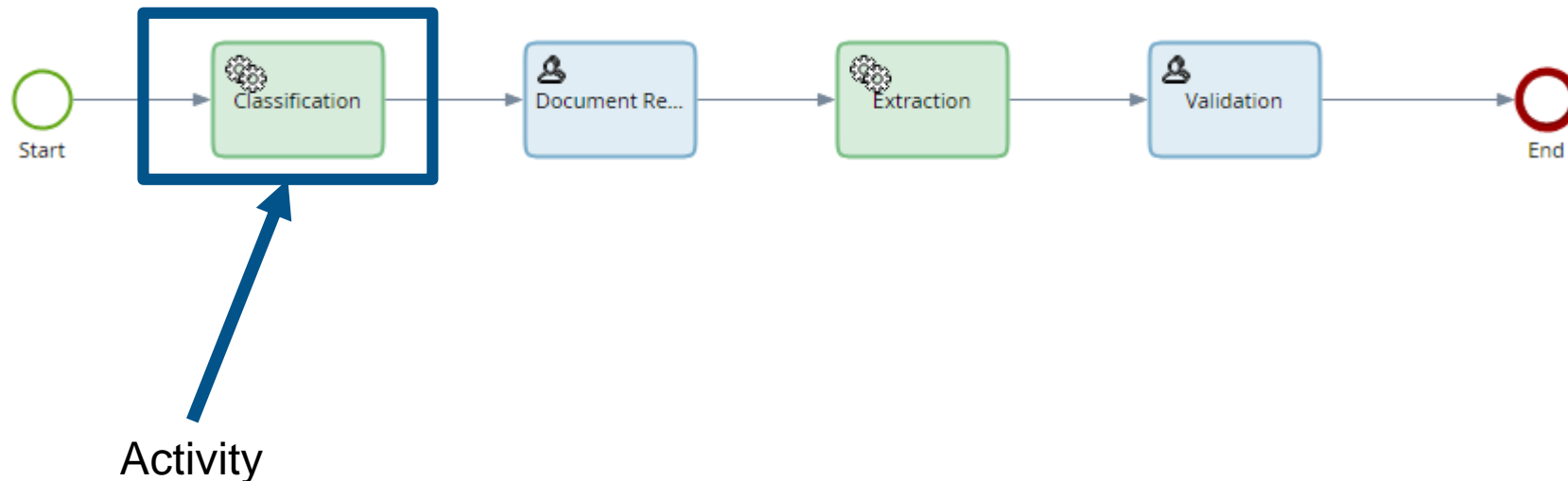
Separate on scan

Create a Capture Process (Business Process)

- Process consists of activities
- Each Capture activity has a type e.g. Classification
- Can have parallel activities/paths within a process
- Activities can be manual (performed by people) or automatic (performed by the system)

Activity

Overview of Capture Activity Terminology

- **Classification**
  - Classify document types based on sample document layouts or content, that the system has been trained to recognise

- **Document Review**
  - Optional manual activity to review classification results
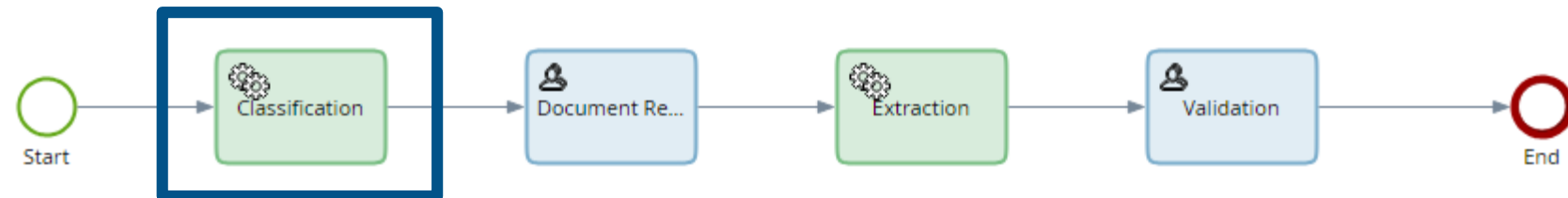
- **Extraction**
  - Extract data (fields) from documents using locators

- **Validation**
  - Optional manual activity to validate extraction results
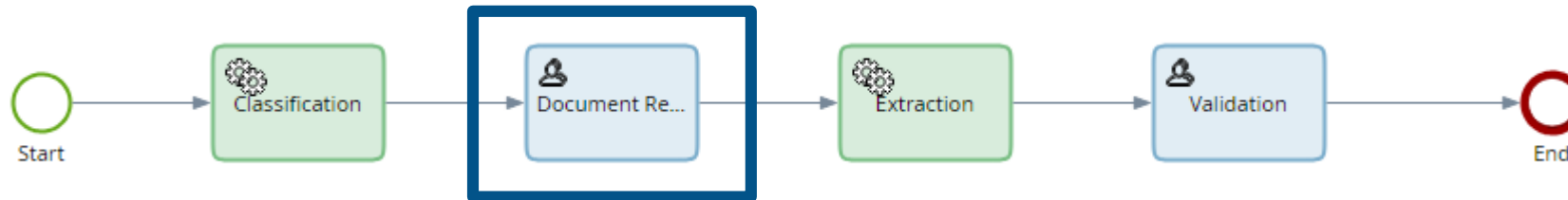
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Classification Activity

- **Automatic** activity that will attempt to classify an image to a document type e.g. Loan Application, Driver's License, or Utility Bill
- **Classification Confidence** is set for each document

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Document Review Activity
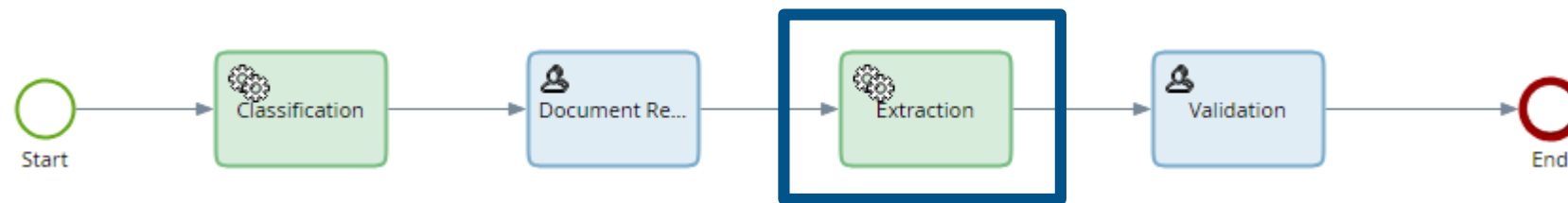
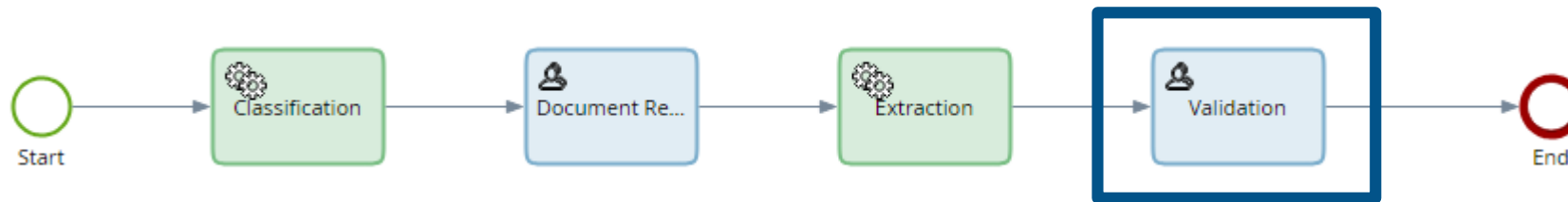- Optional **Manual** activity to review classification results

Extraction Activity

- **Automatic** activity that extracts data (using locators) from documents based on the fields defined in the document type

Validation Activity

- Optional Manual activity to allow users to validate extracted fields
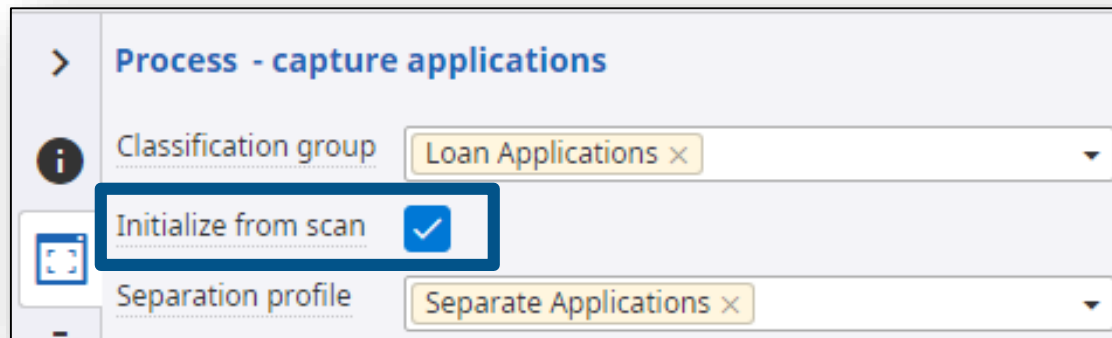
Configuring a Process for Capture

- If you are developing a Capture process, and the process will be initialized by a scan, you should configure the following process properties:
  - Initialize from scan
  - Classification group
  - A Document or Folder Initialization variable must be defined

Setting the Classification group at the process level is a user interface convenience, it does **not** mean that classification will take place on initializing the process.

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A Note on Initialize from Scan

- Initialize from scan applies to documents ingested via the following mechanisms :
    - Scan
    - Imported Files
    - Mailbox
    - Watched Folders
    - Mobile capture
    - MFP device
    - Fax

- In other words…any capture source

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Variables

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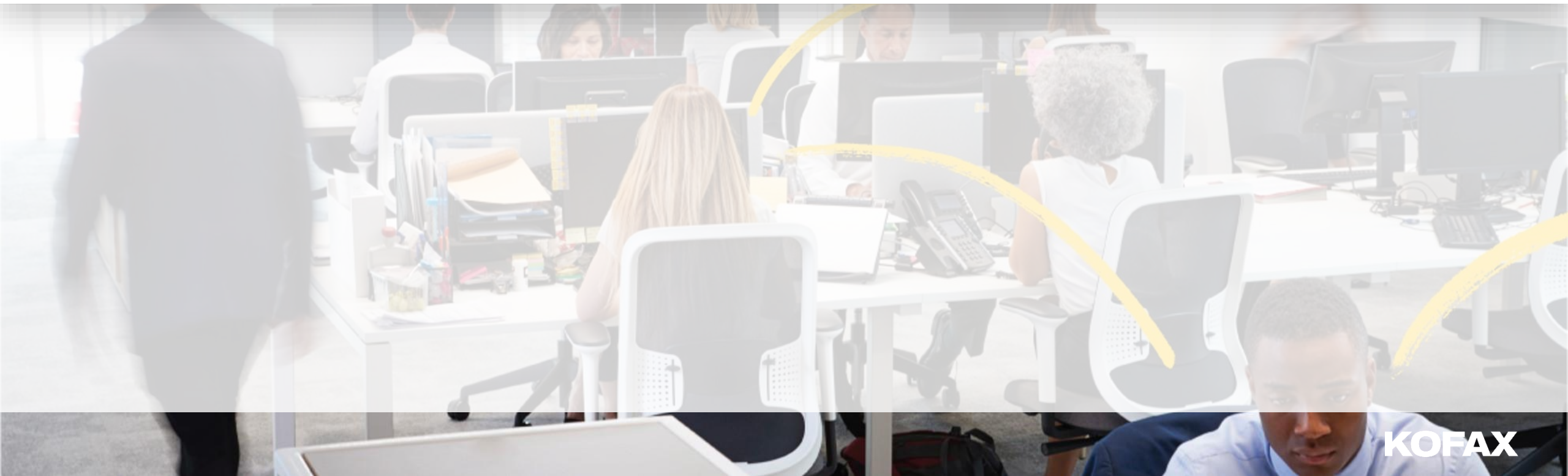
Variables

- Data is stored in **Variables**

- Variables have a type e.g. String, Date, Folder, Document etc.

- Variables have scope – process and server level

- **Process initialization** Variables
  - Initialize a job with data when the job is first created
 - Folder variable is passed into the process

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Variables

- Two special variable types exist for a scan initiated process:
  - Folder – a collection of documents and optionally subfolders
  - Document – holds reference to a single document

- Need to define a Folder variable as an initialization variable in our process

- The folder variables **Value** property determines the Folder that is created

- The separated scanned documents are automatically passed into the folder when the job is created

| Applications Folder | APPLICATIONS_FOLDER | Folder | Applications | ✓ | ⋮ |

Capture Applications - Initialization Variables

- Folder variable (Applications) holding Scan Details (Operator, Date, Location) and Documents/Subfolders
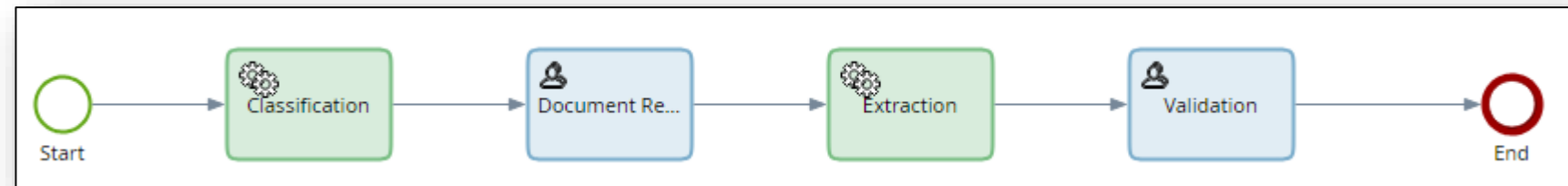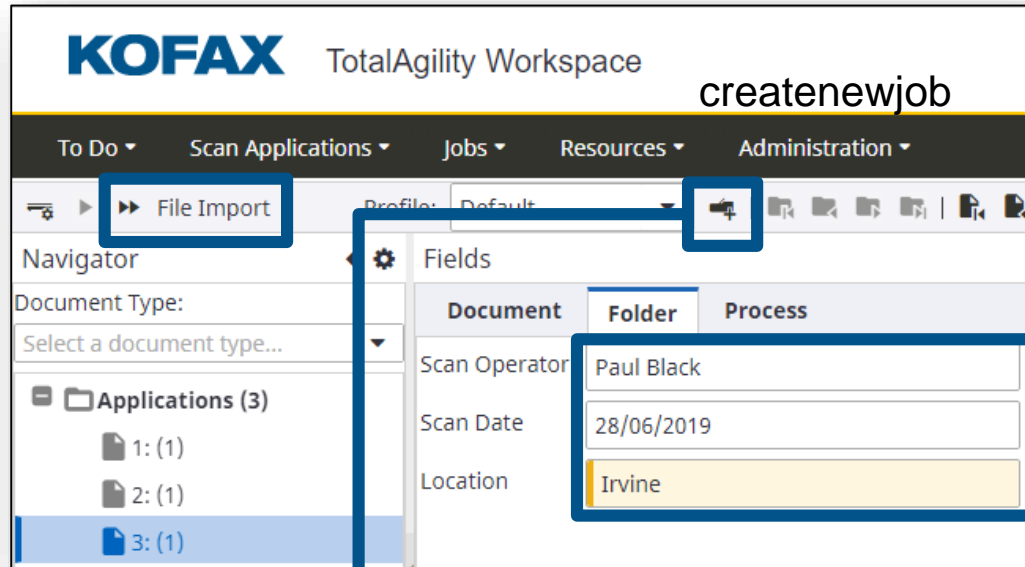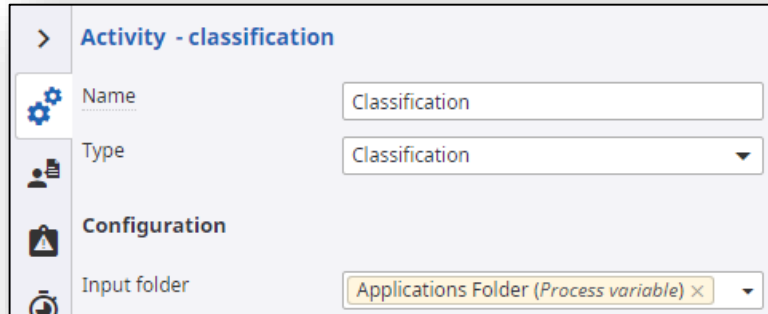
Configure Capture Process Activities

- Each Capture activity needs to be provided with an **Input Folder** (the scanned folder of documents)
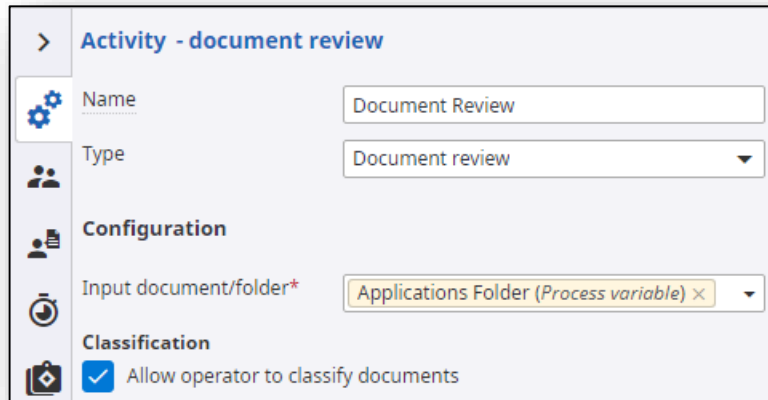- The **Classification Group** can be inherited from the process

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Configure Capture Process Activities

- **Classification activity**

- **Document Review activity**

If Allow operator to classify documents is checked, the classification panel is displayed when the document review activity is taken and displayed on a form.

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Configure Capture Process Activities

- **Extraction activity**

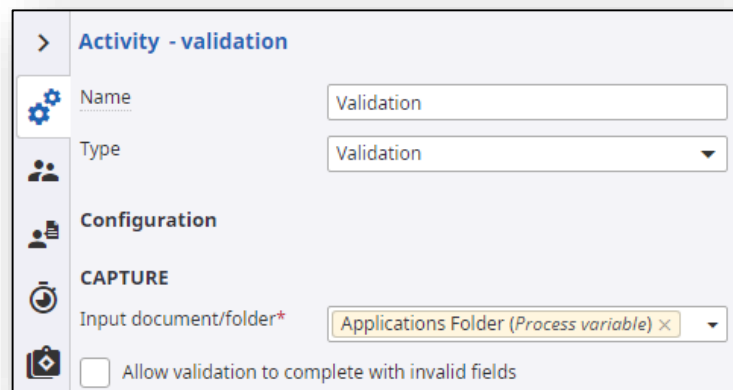|	Activity - extraction	
	Name	Extraction
	Type	Extraction
	Configuration	
	Input document/folder	Applications Folder (*Process variable*) ×

- **Validation activity**

	Activity - validation	
	Name	Validation
	Type	Validation
	Configuration	
	CAPTURE	
	Input document/folder*	Applications Folder (*Process variable*) ×
	☐ Allow validation to complete with invalid fields	
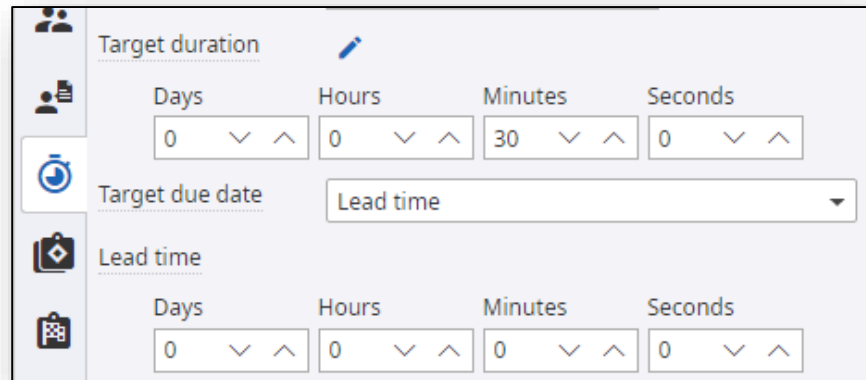
If Allow operator to classify documents is checked, end users can re-classify documents during validation.

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SLA's
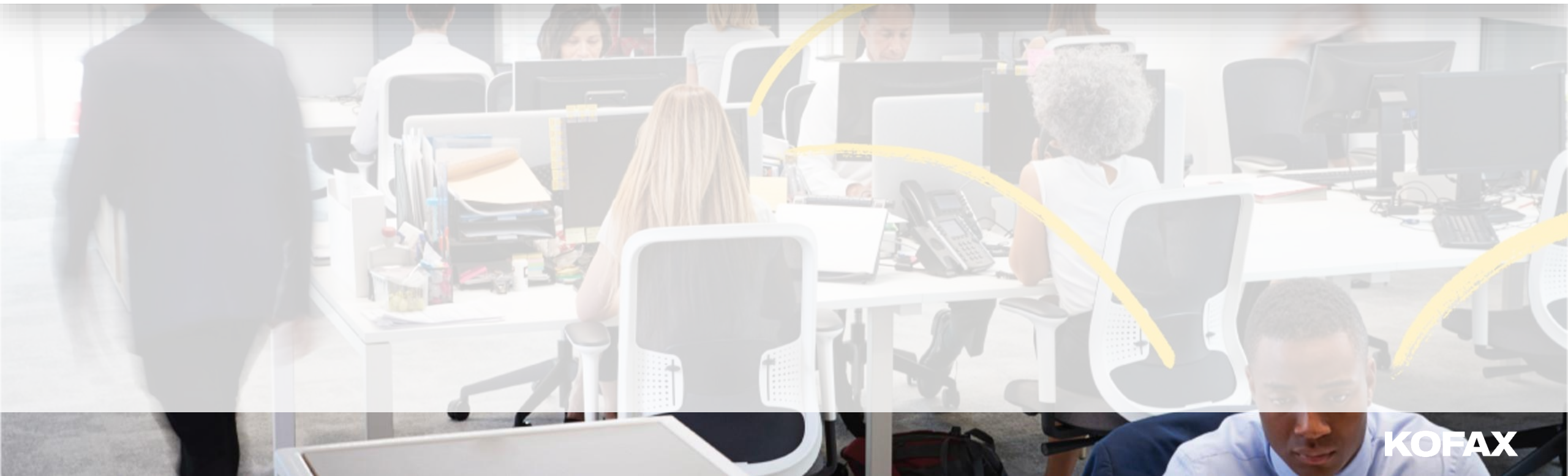
Configure an Activity SLA

- You can set a Target Duration and/or Target Due Date for an activity

- **Target duration**
  - When a user takes an activity TotalAgility records the amount of actual time the activity was open

- **Target due Date**
  - If you are only interested in due dates, use the Target due Date property

- It is possible to escalate against SLA breaches e.g. send an email to a supervisor

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Folder and Document Variables

Folder Variables

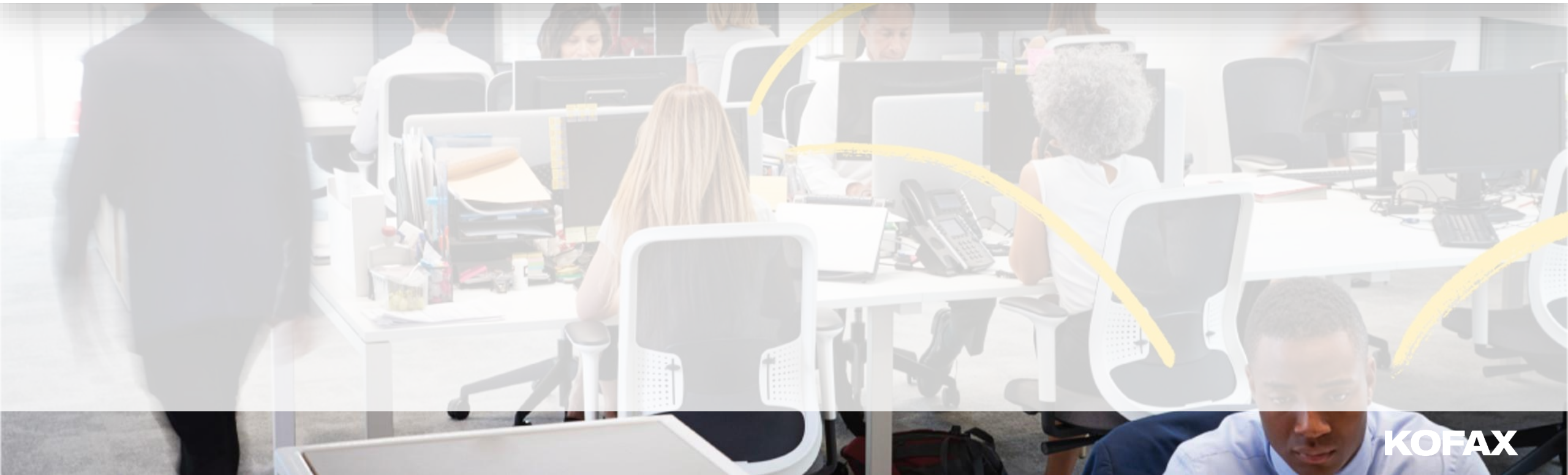- A folder variable is used to store a reference to a folder in the TotalAgility database

- When you create a job on a process that uses a folder variable, the runtime instance ID of the folder is stored in the folder variable

- **Note**
  - For a scan enabled process, you can set the variable for process initialization only when it has the root (top level) folder as its value i.e. you cannot use a sub folder as its value
  - However, for a normal process, the variable value can be a root folder or sub folder

Where to use Document or Folder Variables

- Use a document or folder variable in activities such as Ordinary, Email, Business Rule, .NET and in Decision activities

- Use fields or the System properties of a field from a document or folder variable:
  - Any place within a process or rule where a variable can be used
  - In an activity of any type in a process where a variable can be used

You must initialize a document or folder variable before using it in a process or activity; otherwise the job is suspended.

Variables – continued

- In Module 11 other Variable types are covered in more detail. For this lab, only a Folder Variable is required

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