OnBase®
Foundation EP5

Intelligent Capture for AP

Reference Guide

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Copyright

Document Name ..... Intelligent Capture for AP

Department/Group ..... Documentation

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General Overview

Intelligent Capture for AP is a batch indexing solution that uses OCR technology to teach OnBase to automatically recognize Accounts Payable documents (e.g., invoices, packing slips, purchase orders, etc.) and their associated Keyword Values. The Intelligent Capture for AP engine can perform indexing in two different ways: through configuration and through training. While the configuration method serves as a starting point for the engine to properly identify and index documents using pre-configured vendor data, the training method can greatly improve the effectiveness of Intelligent Capture processing by helping the engine learn the best ways to identify and index documents according to the unique vendors used in your solution.

Indexing Through Configuration

The Intelligent Capture for AP engine allows administrators to upload data from an ERP system into OnBase and configure this data for use in your Intelligent Capture for AP solution. Administrators can associate the data with a Document Type and a vendor name based on uniquely identifying values on invoices (e.g., phone numbers, street addresses, email addresses, etc.). Once the values are identified by the Intelligent Capture for AP engine and matched to their configured Document Type and vendor name, either indexing can continue as normal or the remaining Keyword Values for the Document Type can be populated by an AutoFill triggered by the PO Number or vendor name Keyword.

Indexing Through Training

To improve the Intelligent Capture for AP engine's ability to accurately index documents without manual user intervention, you can train the engine to find document identifiers and Keyword Values by performing index verification on batches that have already undergone Intelligent Capture for AP processing. In confirming or correcting the indexing results achieved by the engine, you provide the engine with "feedback" on how effective its indexing logic was for processing a given batch. The engine can then incorporate this feedback when processing batches for the same vendor going forward, effectively honing its indexing logic and steadily improving over time.

To expedite the index verification process and to ensure that your confirmed/corrected values will be used to train the engine, you can use any or all of the Interactive Data Capture product's three indexing methods (i.e., Auto-Complete indexing, Point and Click indexing, or Swiping). For more information on these methods, see the **Interactive Data Capture** module reference guide.

Point and Shoot Indexing

Point and Shoot Indexing allows you to select an area of a document to be processed so that a Document Date or Keyword Value can be extracted from that area. This feature can only be performed in the OnBase Client on image documents. While this feature can be used to expedite the index verification process, it is distinct from Interactive Data Capture's Point and Click indexing feature and cannot be used explicitly to train the Intelligent Capture for AP engine.

Accuracy and Verification Features

Additionally, Intelligent Capture for AP offers a number of accuracy and verification features to ensure that documents are being indexed correctly.

- The Intelligent Capture for AP engine's Suspect Level threshold is configurable, allowing you to determine how confident the engine must be that an indexing value is correct before it is assigned to the document.
- Documents containing values that exceed the Intelligent Capture for AP engine's configured Suspect Level threshold are routed to the batch status queue configured for indexing so that they can be manually evaluated and, if necessary, corrected. When performing index verification, these values are highlighted in green, orange, yellow or red.

Intelligent Capture vs. Advanced Capture

The Intelligent Capture platform and the Advanced Capture module are both OnBase products that rely on OCR technology to classify and index documents. Each of these products has its own place in the OnBase product suite — depending on your business needs, one may be a better fit as part of your overall OnBase solution or they may complement one another to meet all of your document classification and indexing needs.

Note: The Intelligent Capture platform includes both Intelligent Capture for AP and Intelligent Capture for EOB.

Some things to consider when evaluating Intelligent Capture and Advanced Capture:

	Intelligent Capture	Advanced Capture
Reduces the cost and time associated with manually indexing documents	✓	✓
Able to classify documents (i.e., assign them to a Document Type) as well as index them	✓	✓

	Intelligent Capture	Advanced Capture
The better choice for structured data, where document identifiers and Keyword Values are displayed in the same place on each page of every document		✓
The better choice for semi-structured data, where document identifiers and Keyword Values may or may not be located in the same locations on all pages	✓	
Provides more accurate results because the user determines the locations on each page that are evaluated for indexing purposes		✓
Reduces administrative costs by not requiring administrators to create a template for each document layout that needs to be identified by the engine	✓	
Allows confidence levels to be determined at the Document Type or Keyword Type level		✓
Includes Point and Shoot indexing for ad-hoc indexing value recognition from within Document Imaging's indexing interface	✓	✓
Easily configured and managed using a point-and-click interface	✓	✓
Unlike other forms processing software, does not require a separate database or switching between multiple applications	✓	✓

Applications

Intelligent Capture for AP can be used by any organization looking for a way to automate its AP processes in order to reduce the cost and administrative overhead required for manually indexing.

For instance, an Accounts Payable department that receives invoices from several or several hundred vendors can use Intelligent Capture for AP to classify and index invoices without the cost associated with manually indexing them and without the overhead required by Advanced Capture to manually create a template for each invoice's individual layout.

System Prerequisites

The following OnBase features/functionalities must be correctly installed and configured prior to using Intelligent Capture for AP:

- **OnBase Service Account**
- **Hyland OCR Engine (64-bit)**
- **Hyland Data Capture Server**
- **Hyland Data Capture Configuration Tool**
- **OnBase Application Server**
- **OnBase Unity Client**
- **One or more batch import modules (e.g., Document Imaging, Disconnected Scanning, Document Import Processor, etc.)**. Batch import modules are used to import the batches of unindexed documents that are classified and indexed via Intelligent Capture for AP, and can also be used to import the batches of documents that are used to create the Intelligent Capture for AP training sets.

For more information on the installation and configuration of these OnBase features and products, contact your solution provider.

A Note for OnBase Solution Providers

See Pre-Installation on page 8 for more information on the specific installation and configuration needs of these prerequisite features/functionalities for Intelligent Capture for AP.

Licensing

Intelligent Capture for AP license is required for each server that is running the Data Capture Server Windows Service.

Note: The Data Capture Server Windows Service may be installed on multiple servers, but the number of available licenses controls the number of instances of the service that can be run concurrently.

Additionally, in order to import the batches of unindexed documents that are able to undergo Intelligent Capture for AP (in addition to the existing documents that comprise any Intelligent Capture for AP training sets), your OnBase solution must be licensed for one or more batch import modules (e.g., Document Imaging, Disconnected Scanning, Document Import Processor, etc.).

To extract Keyword Values from bar codes, your solution must be licensed with either a Bar Code Recognition Server license or a Bar Code Recognition for Advanced Capture license.

For more information on these modules and their required licensing, see their respective module reference guides or help files.

Note: The Interactive Data Capture license is included with the Intelligent Capture for AP license. This means that users of Intelligent Capture for AP will automatically have access to full Interactive Data Capture functionality. For more information, see the **Interactive Data Capture** module reference guide.

Check your current licensing status by clicking **Utils** | **Product Licenses** from the OnBase Configuration module.

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Intelligent Capture for AP

Installation Guide

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Requirements

The following sections outline requirement information specific to Intelligent Capture for AP in OnBase Foundation EP5.

General Requirements

For general requirement information that applies to Intelligent Capture for AP and other modules, see the sections on the following topics in the **Installation Requirements** manual:

- Database Requirements
- Supported Desktop Operating Systems
- Microsoft .NET Framework Requirements
- Microsoft Visual C++ Requirements
- OCR Processing Workstation Hardware Requirements (when setting up the host for the Data Capture Server Windows Service)
- Unity Client Browser Requirements (when setting up a training workstation)
- Unity Client Platform Hardware Requirements (when setting up a training workstation)
- Miscellaneous Requirements

Windows Service Host Requirements

OCR Processing Workstation Supported Operating Systems

- Windows 8.1
- Windows Server 2012 R2
- Windows 10
- Windows Server 2016
- Windows Server 2019
- Windows Server 2019 Server Core
- Windows Server 20H2 Server Core

Licensing

See Licensing on page 4 for licensing requirements.

Pre-Installation

The following products and features should be addressed prior to installing and configuring Intelligent Capture for AP.

OnBase Products

The following OnBase products must be installed prior to installing and configuring Intelligent Capture for AP.

Hyland OCR Engine

Various OnBase modules (for example, Intelligent Capture for AP, Advanced Capture, Full-Page OCR, and Automated Redaction) use the Hyland OCR Engine as their recognition package.

The Hyland OCR Engine (version 21.00 or later) is required for these modules. This software is included with the purchase of these modules, and it is available from your OnBase solution provider. It does not require separate licensing or registration.

Tip: Even when older versions of the Hyland OCR Engine are supported, it is highly recommended that you use the most recent version with your solution.

When deploying the OCR engine on the Data Capture Server, the 64-bit version must be used.

With this in mind, note that the modules and functionalities that use the Hyland OCR Engine can reside in the following platforms:

- **OnBase Client only:** Advanced Capture and Automated Redaction.
- **Data Capture Server only:** Intelligent Capture for AP and Interactive Data Capture.
- **Either:** Full-Page OCR (batch or ad hoc).

Additional Information

- You must install the Hyland OCR Engine (64-bit) on each server that will perform OCR processing on the Data Capture Server.
- Multi-threaded access (that is, multiple documents can be processed at once) is supported by the Hyland OCR Engine (64-bit) on the Data Capture Server.
- In order for the Hyland OCR Engine to recognize fonts correctly, Windows ClearType must be disabled. If Windows ClearType is enabled when OCR is being performed, the OCR engine will disable it automatically.

For more information, see Bar Code Processing on page 23.

OnBase Application Server

Ensure that the OnBase Application Server has been installed and configured correctly prior to installing and configuring Intelligent Capture for AP.

For more information on installing the Application Server, see the **Application Server** module reference guide.

Unity Client

Ensure that the Unity Client has been installed and configured correctly prior to installing and configuring Intelligent Capture for AP.

For more information on installing the Unity Client, see the **Unity Client** module reference guide.

Batch Import Modules

To use Intelligent Capture for AP, your OnBase solution must be properly licensed and configured to import batches of image or PDF documents into OnBase scan queues.

A number of OnBase modules, such as Document Imaging, Disconnected Scanning, or Document Import Processor (DIP), can be used to import documents into batches via scan queues.

Bar Code Recognition

To extract Keyword Values from bar codes in your solution, the Hyland Bar Code Recognition software must be installed on the workstation performing bar code processing.

For more information on installing the Hyland Bar Code Recognition software, see the **Bar Code Process** module reference guide.

OnBase Configuration

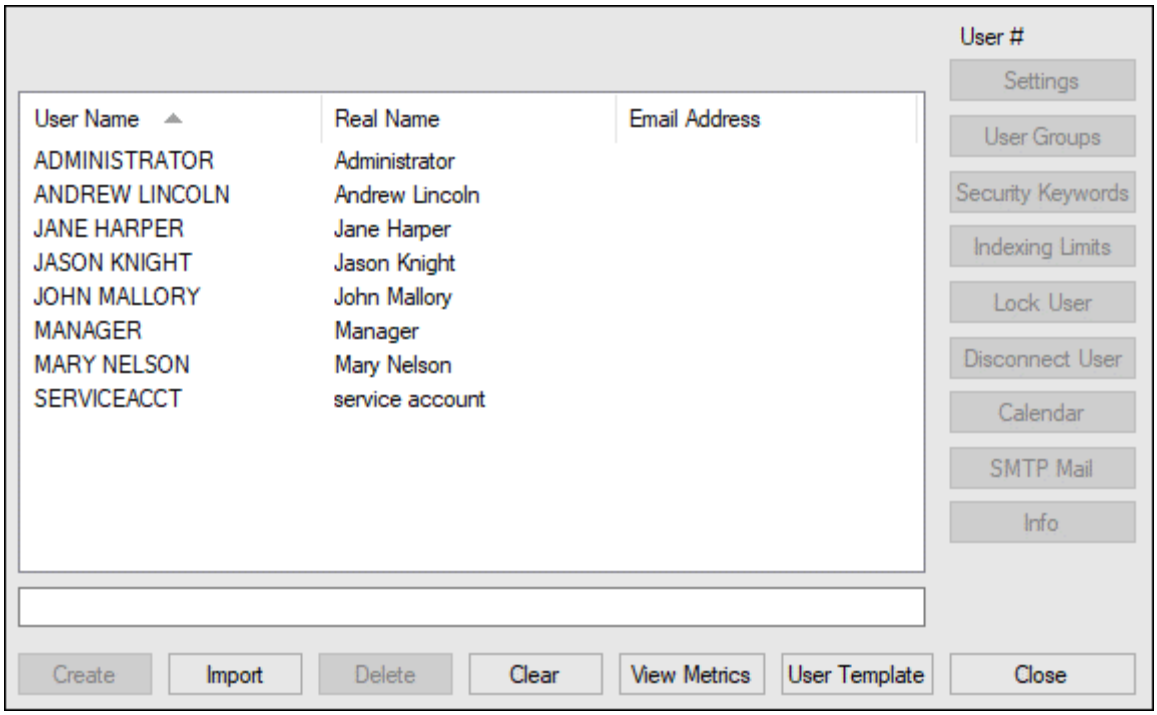
The following OnBase configuration elements must be in place prior to installing and configuring Intelligent Capture for AP.

OnBase Service Account

You must create a service account in OnBase to run the Data Capture Server Windows Service.

To configure a Service Account:

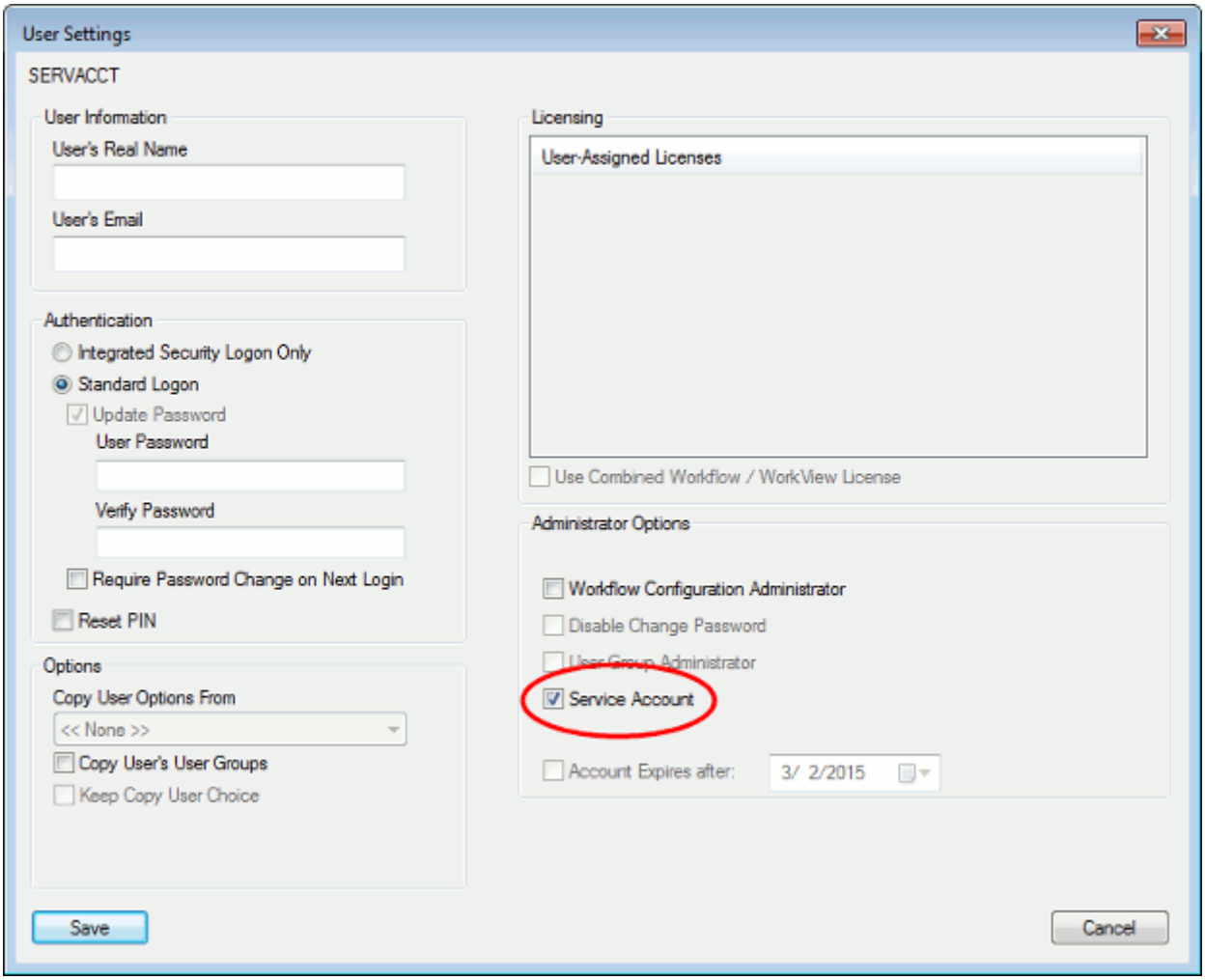
1. From the Configuration module, select **Users** | **User Names / Passwords**.
   The **User Names & Passwords** dialog box is displayed.



2. Enter a new user name in the field beneath the **User Name** list and click **Create**. The **User Settings** dialog box is displayed.
   You can also select an existing user account to designate as a service account, then click **Settings**. The **User Settings** dialog box is displayed.

3. Select the **Service Account** check box under **Administrator Options**.

   All options not applicable to a Service Account are disabled. Deselecting the **Service Account** check box for the existing user allows them to retain all rights and privileges that were previously assigned to them. Options in the **User Settings** dialog box are cleared when the **Service Account** check box is selected and must be reapplied when the check box is deselected.



Caution: The **Service Account** check box should never be selected with an account that is being used to run the OnBase Client (obclnt32.exe) as a Windows service.

Caution: Designating an existing user account as a **Service Account** removes the existing user from all User Groups and prevents the user from being added into a User Group. Users that are configured as service accounts will not be able to log into OnBase through standard interfaces. A Service Account also grants the user name full rights and privileges in OnBase.

4. Enter a **User Password** and repeat this password in the **Verify Password** field. If this is an existing user account and you need to change its password, select **Update Password** to enable these fields.

Note: The **Require Password Change on Next Login** setting cannot be selected for Service Accounts.

5. Click **Save**.

Installation

For installation procedures, see Data Capture Server Installation on page 22.

Command Line Switches

There are no command line switches that apply to Intelligent Capture for AP.

INI Options

There are no onbase32.ini settings that apply to Intelligent Capture for AP.

Backup/Recovery

Backup

Configuration

The Intelligent Capture for AP configuration is stored in the OnBase database. A proper backup of the database will contain all Intelligent Capture for AP configuration information, including all Intelligent Capture for AP training jobs.

Configuration information specific to the Data Capture Server Windows Service is also stored in the Hyland.DataCapture.Server.exe.config file. This file should be backed up as part of the Data Capture Server Windows Service installation files.

Registry Settings

No registry settings apply to Intelligent Capture for AP.

External Files

Ensure that the Hyland OCR Engine and the Data Capture Server Windows Service have been properly backed up.

You must also backup your onbase32.ini file.

Module-Related INI Options

No INI options apply to Intelligent Capture for AP.

Additional Steps

There are no additional steps required to backup Intelligent Capture for AP.

Recovery

Configuration

Intelligent Capture for AP configuration information, including training jobs, is stored in the OnBase database. Restoring the OnBase database will restore the Intelligent Capture for AP configuration.

Data Capture Server Windows Service configuration information is stored in the Hyland.DataCapture.Server.exe.config file. Restoring this file as part of the Data Capture Server Windows Service will restore the service's configuration.

Registry Settings

No registry settings apply to Intelligent Capture for AP.

External Files

Ensure that your onbase32.ini file is properly restored to the correct location by the backup copy.

The onbase32.ini file can be restored from the backup if the recovery machine is intended to be used for exactly the same purpose as the original machine. If this machine will be used for other modules, thorough testing may be required to ensure that there are no unintended consequences from adding/modifying INI settings on the existing workstation.

Restore the Hyland OCR Engine by re-installing it on the server hosting the Data Capture Server Windows Service using the Hyland OCR Engine setup wizard.

Restore the Data Capture Server Windows Service by re-installing it on the server hosting the Hyland OCR Engine using the Hyland Data Capture Server x64 Setup wizard.

Module-Related INI Options

No INI options apply to Intelligent Capture for AP.

Registration

If necessary, migrate the registration of the Intelligent Capture for AP from the original workstation to the recovery workstation. The registration may need to be revoked from the original machine and then added to the recovery machine.

Additional Steps

No additional recovery steps are required for Intelligent Capture for AP.

Upgrade Considerations

The following upgrade considerations have been compiled by OnBase subject matter experts. These upgrade considerations are general and applicable to most OnBase solutions and network environments and should be considered each time an upgrade is performed.

Carefully consider the impact of making any changes, including those listed below, prior to implementing them in a production environment.

For additional general information about upgrading OnBase, refer to the Upgrade Guidelines reference manual, and visit the Hyland Community at: https://www.hyland.com/community.

Intelligent Capture for AP Upgrade Considerations

The following information should be considered or noted when upgrading Intelligent Capture for AP deployments. Read this information prior to upgrading your version of OnBase.

Server Machine Considerations — The following should be considered with regard to server machines:

- When upgrading to OnBase Foundation EP5 from any previous version, you must first re-confirm any pre-existing Intelligent Capture for AP mappings in the Data Capture Configuration Tool before running the Data Capture Server Windows Service. This ensures that the database is appropriately updated for the current version of Intelligent Capture for AP processing.
- While multiple Data Capture Servers can operate in an Incremental Parallel Upgrade Process environment, the individual products using Intelligent Capture for AP features (e.g., Data Capture Server, Application Server, and Unity Client) must all be on the same version of OnBase.

General Deployment Considerations — The following should be considered with regard to a general deployment:

- Beginning in OnBase 17, your Intelligent Capture for AP solution must maintain an Internet connection to connect to a Global Cloud Services (GCS) server in order to report volume statistics to your solution provider.
- Beginning in OnBase 16, the Intelligent Capture for AP license is site-based, and the amount of volume being processed is recorded in the database. If you are upgrading from a version of OnBase prior to OnBase 16, you must remove the workstation registrations for any older versions of the license.
- When upgrading to OnBase Foundation EP5 from any previous version, you must first export the Intelligent Capture for AP configuration settings and learned data from the Data Capture Configuration Tool.
- When importing Intelligent Capture for AP configuration settings and learned data into your system, it is considered a best practice to only import settings and data that were exported from either the current version of the Data Capture Configuration Tool or one service pack version prior. Intelligent Capture for AP configuration settings and learned data exported from two or more service pack versions prior to the current version may not be successfully imported into your system. For more information on exporting and importing Intelligent Capture for AP configuration settings and learned data between versions, contact your first line of support.
- If you are upgrading from a version of OnBase prior to OnBase 15 SP 1, you must create at least one ERP system record in the Data Capture Configuration Tool and assign all existing vendors to it.

Troubleshooting

Common Issues

Automatic scan queue processes are not being performed.

Automatic processes, such as **Auto OCR Batches**, **Auto Commit Batches**, **Auto PDF Conversion**, **Auto-Perform Image Processing**, and **Auto-Run after Scan**, are only initiated when batch activity, such as indexing and scanning, is performed in the OnBase Client module.

If batch activity is taking place outside the OnBase Client and automation is needed, the desired processes must be performed on a workstation running the OnBase Client module with one or more auto-processing command line switches or they must be scheduled to occur on a workstation running the OnBase Client module.

This does not apply to the auto-foldering and auto-naming options, as they take place on a document level rather than based on batch activity.

ERP System vendor data is locked.

The vendor data in an ERP system can become stuck in a locked state due to unforeseen issues. For example, the ERP system may become locked if the Data Capture Server is stopped during a scheduled vendor import process.

If an ERP system is locked, learned vendor data in the ERP system is unavailable for ICAP processing, and vendor names and numbers are not identified for processed documents. The following error message is sent to the Diagnostics Service and Diagnostics Console: **Hyland.DataCapture.Server: Intelligent Capture for AP could not be performed because no extraction data was available.**

To resolve this issue, an administrator can manually unlock a locked ERP system using the Data Capture Configuration Tool.

Caution: Manually unlocking an ERP system should only be done if the ERP system is locked. Unlocking an ERP system during an active vendor data update could result in data conflicts for the Intelligent Capture for AP engine.

To unlock a locked ERP system:

1. Log into the Data Capture Configuration Tool.
2. Select the **Intelligent Capture for AP** product option and click **Next**. The **AP Configuration Options** screen is displayed.
3. Select **Configure ERP Vendor Data** and click **Next**. The **ERP System Setup** screen is displayed.
4. Select the locked ERP system in the **Configured ERP Systems** list.
5. Click **Unlock**. A warning message is displayed.
6. Click **Yes**. A confirmation message is displayed to confirm that the ERP system was successfully unlocked.
7. Click **OK**.

Error Logging

All diagnostic and error logging information is logged and viewed in the Diagnostics Console. Error logging information returned by the Intelligent Capture for AP engine is displayed in the Diagnostics Console with the **OCR Service** prefix for easy identification.

Depending on your error logging needs, the **level** setting in the Hyland.DataCapture.Server.exe.config file can be set to **Diagnostics** (more logging) or **Error** (less logging) to capture error information from the Intelligent Capture for AP engine.

For more information on the **level** setting, see The Hyland.DataCapture.LoggingConfiguration Element on page 47.

For more information on the Diagnostics Console, see the **Diagnostics Service and Diagnostics Console** module reference guide or help file.

Contacting Support

When contacting your solution provider, please provide the following information:

- The OnBase module where the issue was encountered.
- The OnBase version and build.
- The type and version of the connected database, such as Microsoft SQL Server 2014 or Oracle 12c, and any Service Pack that has been installed.
- The operating system that the workstation is running on, such as Windows 10 or Windows Server 2012 R2, and any Service Pack that has been installed. Check the supported operating systems for this module to ensure that the operating system is supported.
- The name and version of any application related to the issue.
- The version of Internet Explorer and any Service Pack that has been installed, if applicable.
- A complete description of the problem, including actions leading up to the issue.
- Screenshots of any error messages.

Supplied with the above information, your solution provider can better assist you in correcting the issue.

The Data Capture Server is a network server that connects to and interacts with the OnBase Application Server, allowing for the retrieval of information from the OnBase database and for efficient OCR processing. The Data Capture Server hosts a Windows Service that handles all communication with the Application Server and manages all OCR processing that takes place on the Data Capture Server itself.

Licensing and OCR Worker Processes

The Data Capture Server creates and manages OCR worker processes according to product licensing. Each worker process hosts an instance of the OCR engine, and can process up to four documents simultaneously. The more worker processes available, the better the OCR processing performance will be.

When the Data Capture Server Windows Service is started, it calculates the number of OCR worker processes to create in different ways, depending on the type of license(s) available.

Note: If your system is not licensed with any of the below licenses, and your Data Capture Server is not configured to perform bar code recognition, then either the **ImageProcessingSettings** sub-element or the **XMLImportSetting** sub-element in the Data Capture Server configuration file must be enabled in order for the Data Capture Windows service to successfully start. See The Hyland.DataCapture.Server.exe.config File on page 46 for more information.

Institutional Licenses

For institutional licenses, the number of OCR worker processes created depends on the number of CPU cores available on the workstation. To determine a total saturation level for OCR work on the system, the number of cores on the workstation is multiplied by two. Since each OCR worker process can handle up to four documents at once, the OCR saturation level is then divided by four to determine the number of OCR worker processes to create.

For example, apply this formula to a six-core system:

(# of cores) * 2 = (# of OCR worker threads) / 4 = (# of on-demand OCR workers created)

6 cores * 2 = 12 OCR worker threads / 4 = 3 on-demand OCR workers

Note: If more than one on-demand product is licensed, only one set of on-demand OCR workers is created for all on-demand products on the workstation.

The following institutional licenses are available for Data Capture Server on-demand products:

- Interactive Data Capture
- OCR for Application Enabler

Batch Licenses

For batch licenses, the number of OCR worker processes created depends on the number of Units that have been allocated to the workstation by a system administrator (see Assigning Units to a Workstation on page 19 for more information). When compared to the calculation for institutional licenses, this Units number replaces the number of available cores in the equation. Aside from this difference, the calculation for batch licenses is the same (i.e., multiply the starting number by two, then divide by four).

Furthermore, unlike the handling of multiple on-demand products, separate sets of batch OCR workers can be created when multiple batch products are licensed on the workstation.

For example, apply the formula to a workstation that has been allocated twelve Units of Full-Page OCR:

(# of Units) * 2 = (# of OCR worker threads) / 4 = (# of batch OCR workers created)

Full-Page OCR: 12 Units * 2 = 24 OCR worker threads / 4 = 6 batch OCR workers

Total: 6 batch OCR workers

The following batch licenses are available for Data Capture Server products:

- Full-Page OCR

Assigning Units to a Workstation

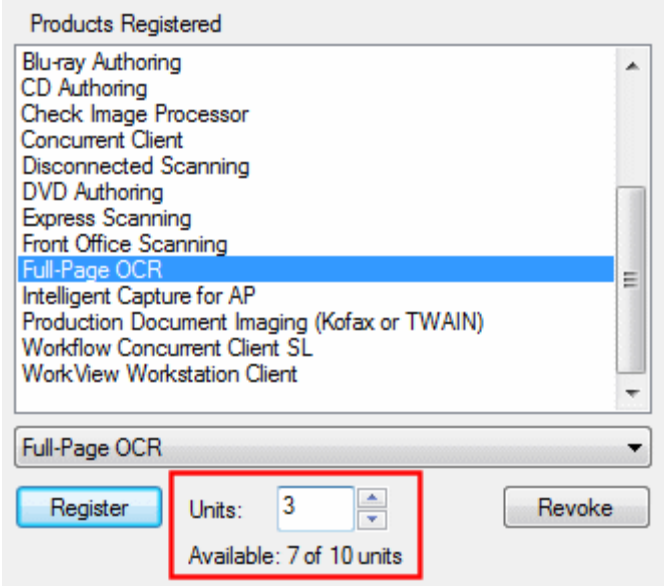
System administrators can perform load balancing of the Data Capture Server batch products across multiple workstations by assigning specific numbers of Units to each workstation. This allocation of Units is performed in the **Products Registered for Workstation** dialog box in the OnBase Client.

Note: If an intended workstation has been registered in the OnBase system, an administrator can assign Units from any workstation connecting to OnBase. If an intended workstation has not yet been registered to OnBase, starting or restarting the Data Capture Server Windows Service from that workstation automatically registers the workstation for one Unit of the unregistered licensed Data Capture Server product. If additional Units are required, the administrator can allocate the Units from the OnBase Client on any workstation connecting to OnBase.

Tip: For general information on workstation registration, see the Workstation Registration section of the module reference guide or help files for your specific Data Capture Server product.

To assign Units to a workstation:

1. In the **Products Registered for Workstation** dialog box, ensure that the desired workstation is selected and that the appropriate Data Capture Server batch license (i.e., Full-Page OCR) is registered to the workstation. If the license is not already registered to the workstation, select it from the **Products Registered** drop-down list.
2. Once the appropriate license is selected, a **Units** field is displayed between the **Register** and **Revoke** buttons.



3. In the **Units** field, enter or use the arrow keys to select the desired number of Units. Notice that this number is subtracted from the number of available units displayed below the field.
4. Click **Register** to assign the selected number of Units to the workstation.

Volume-Based Site Licenses

For volume-based site licenses, the number of OCR worker processes created depends on the number of concurrent documents that the processing engine is configured to process at the same time, as specified by a system administrator in the Data Capture Server configuration file (see IntelligentCaptureAPSettings Sub-Element on page 53 for more information).

To determine the number of OCR processes that are created, the same formula is applied as institutional or batch licenses, with the number of concurrent documents replacing the starting number. Aside from this difference, the calculation for volume-based site licenses is the same (i.e., multiply the starting number by two, then divide by four).

Similar to batch licenses, separate sets of OCR workers can be created when multiple volume-based products and batch products are licensed on the workstation.

For example, apply the formula to a workstation configured to process up to 8 concurrent documents for Intelligent Capture for AP and four Units of Full-Page OCR:

(# of concurrent documents) * 2 = (# of OCR worker threads) / 4 = (# of batch OCR workers created)

Intelligent Capture for AP: 8 concurrent documents * 2 = 16 OCR worker threads / 4 = 4 OCR workers

Full-Page OCR: 4 Units * 2 = 8 OCR worker threads / 4 = 2 batch OCR workers

Total: 6 OCR workers

The following volume-based site licenses are available for Data Capture Server products:

- Intelligent Capture for AP

Multiple Data Capture Servers

Multiple Data Capture Servers can be used in a single OnBase environment for batch processing. For instance, separate workstations that connect to the same OnBase database can each potentially have a Data Capture Server installed. Multiple Data Capture Servers can be configured in coordination with the allocation of Units by workstation for OCR processing as an additional/alternative method of load balancing.

When multiple Data Capture Server Windows Services are running, a single service gathers and processes batches until all of its OCR worker threads are filled. A second service then starts gathering and processing batches. If all Data Capture Server Windows Services are stopped, whichever service is started first will begin processing batches. If only one service is stopped, batches remain locked in the **<Capture Product Name> In Progress** batch status queue until the service that was processing the batch is restarted. Furthermore, all batches in an **In Progress** queue are processed before batches in the **Awaiting <Capture Product Name>** queues are processed.

For more information on these batch status queues, see the **Document Imaging** module reference guide or help files.

Installation Requirements

Microsoft Visual C++ Requirements

The Data Capture Server requires the Microsoft Visual C++ Redistributable Packages listed below. If not already present on your system, these packages are installed when the **setup.exe** installer is used to install the Data Capture Server.

The Data Capture Server requires the following:

- Microsoft Visual C++ 2012 Redistributable Package (x64)
- Microsoft Visual C++ 2013 Redistributable Package (x64)
- Microsoft Visual C++ 2019 Redistributable Package (x64)

Hyland OCR Engine Requirements

Both the 64-bit version of the Hyland OCR Engine and the Data Capture Server itself must be installed when using the following modules or functionalities in the following scenarios:

- **Application Enabler:** when processing contextual OCR requests
- **Bar Code Processing:** when sending batches to a separate batch status queue for processing bar codes in the Unity Client
- **Full-Page OCR:** when running OCR processing on multiple batches simultaneously, or when having the OCR batch status queues automatically polled for batches to be processed
- **Intelligent Capture for AP:** always
- **Interactive Data Capture:** always

Note: Regardless of the module(s) being used, the 64-bit version of the Hyland OCR Engine and the Data Capture Server must be installed on the same machine.

Additionally, the Data Capture Configuration Tool must be installed to configure the following modules:

- Intelligent Capture for AP

For installation procedures, see the appropriate sections below:

- Bar Code Processing on page 23
- Installing the Data Capture Server on page 24
- Installing the Data Capture Configuration Tool on page 38

For information on post-installation configuration options, see Post-Installation on page 44.

Pre-Installation

Hyland OCR Engine

Various OnBase modules (for example, Intelligent Capture for AP, Advanced Capture, Full-Page OCR, and Automated Redaction) use the Hyland OCR Engine as their recognition package.

The Hyland OCR Engine (version 21.00 or later) is required for these modules. This software is included with the purchase of these modules, and it is available from your OnBase solution provider. It does not require separate licensing or registration.

Tip: Even when older versions of the Hyland OCR Engine are supported, it is highly recommended that you use the most recent version with your solution.

When deploying the OCR engine on the Data Capture Server, the 64-bit version must be used.

With this in mind, note that the modules and functionalities that use the Hyland OCR Engine can reside in the following platforms:

- **OnBase Client only:** Advanced Capture and Automated Redaction.
- **Data Capture Server only:** Intelligent Capture for AP and Interactive Data Capture.
- **Either:** Full-Page OCR (batch or ad hoc).

Additional Information

- You must install the Hyland OCR Engine (64-bit) on each server that will perform OCR processing on the Data Capture Server.
- Multi-threaded access (that is, multiple documents can be processed at once) is supported by the Hyland OCR Engine (64-bit) on the Data Capture Server.
- In order for the Hyland OCR Engine to recognize fonts correctly, Windows ClearType must be disabled. If Windows ClearType is enabled when OCR is being performed, the OCR engine will disable it automatically.

Bar Code Processing

Bar code processing requires the Hyland Bar Code Recognition for OnBase software to be installed on the workstation that performs bar code processing.

For more information, see the **Bar Code Process** module reference guide or help files.

Installation

Installing the Hyland OCR Engine

To install the Hyland OCR Engine:

Obtain the **Hyland OCR Engine [<version>] for DC Server x64** installer from Technical Support and copy it to each machine that will be performing OCR processing:

Note: The 64-bit OCR engine can only be deployed on 64-bit systems.

1. Double-click the Hyland OCR Engine [<version>] executable to launch the installer. The setup wizard's **Welcome** screen is displayed.
2. Click **Next**. The **Destination Folder** screen is displayed.
3. On the **Destination Folder** screen, you must specify the installation location on the OCR processing workstation.

   The following default installation location is automatically selected:

   C:\Program Files\Hyland\OCR

   To select a different location, manually enter the path in the **Destination Folder** field or click **Change** to browse to the location.

   When the destination folder has been selected, click **Next**.
4. The **Ready to install Hyland OCR Engine [<version>]** screen is displayed. Click **Install** to begin the installation.
5. Once the installation is complete, click **Finish**.

Installing the Data Capture Server

The Hyland Data Capture Server x64 Setup Wizard

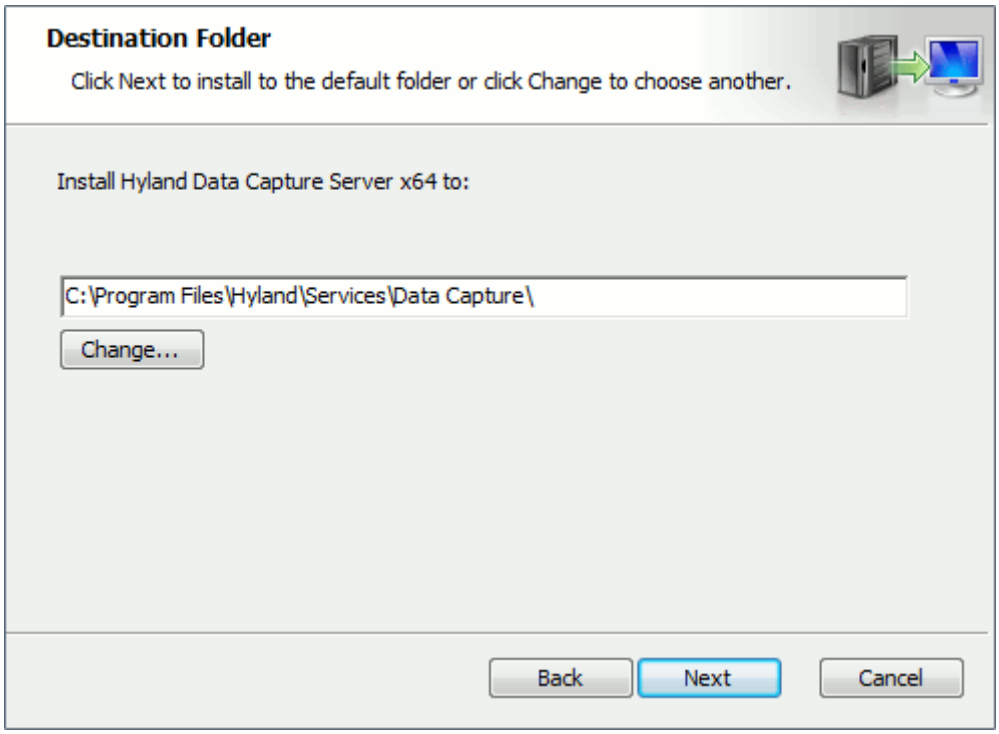
The Data Capture Server is installed using the Hyland Data Capture Server x64 Setup wizard. By default, the Data Capture Server Windows Service, which processes OCR work on the Data Capture Server, is also installed through the wizard.

Note: The Hyland Data Capture Server x64 Setup wizard is only supported in 64-bit environments.

To install the Data Capture Server and its related components:

1. Copy the Hyland Data Capture Server x64 Setup wizard's executable (**Hyland Data Capture Server x64.msi**) to the server that will be running your solution's processes.
2. Launch the setup wizard by double-clicking on the executable. The setup wizard's **Welcome** screen is displayed.

3. Click **Next** to proceed to the **Destination Folder** screen.

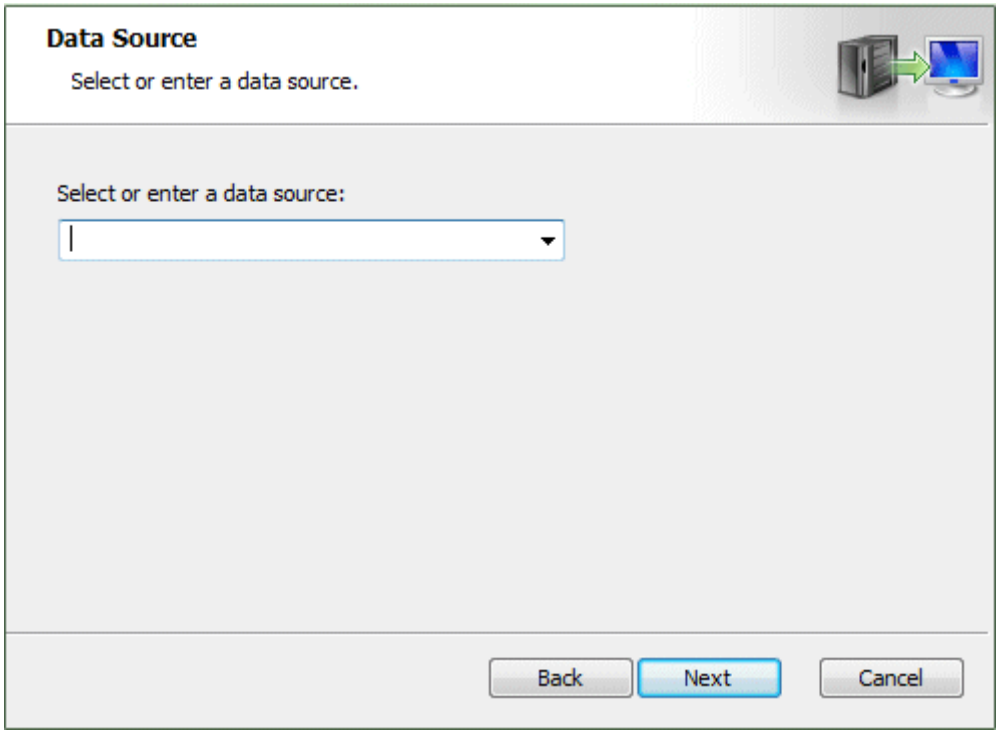


4. From the **Destination Folder** screen, you can select the location where the Data Capture Server files are installed on the server.

   By default, the Data Capture Server files are installed in **C:\Program Files\Hyland \Services\Data Capture**. To change this location, manually enter the path to the folder where you would like the Data Capture Server files to be installed or click **Change** to browse to the location.

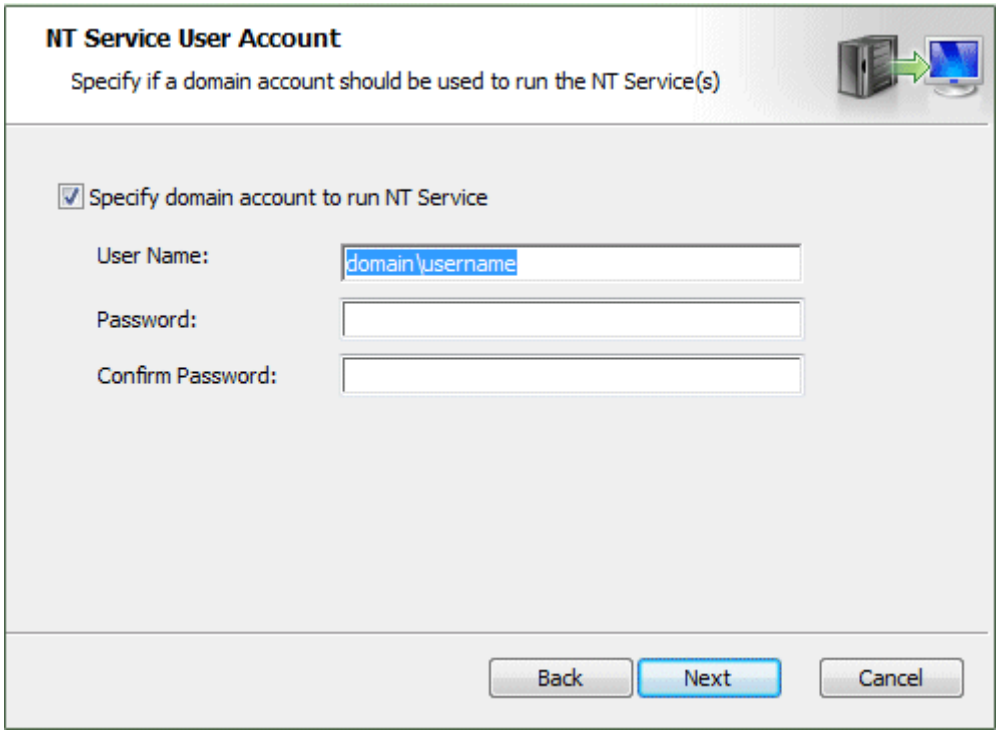
   Once the installation location is set, click **Next**.

5. The **Data Source** screen is displayed.



Select or enter the name of the data source used to connect to your OnBase database and then click **Next**.

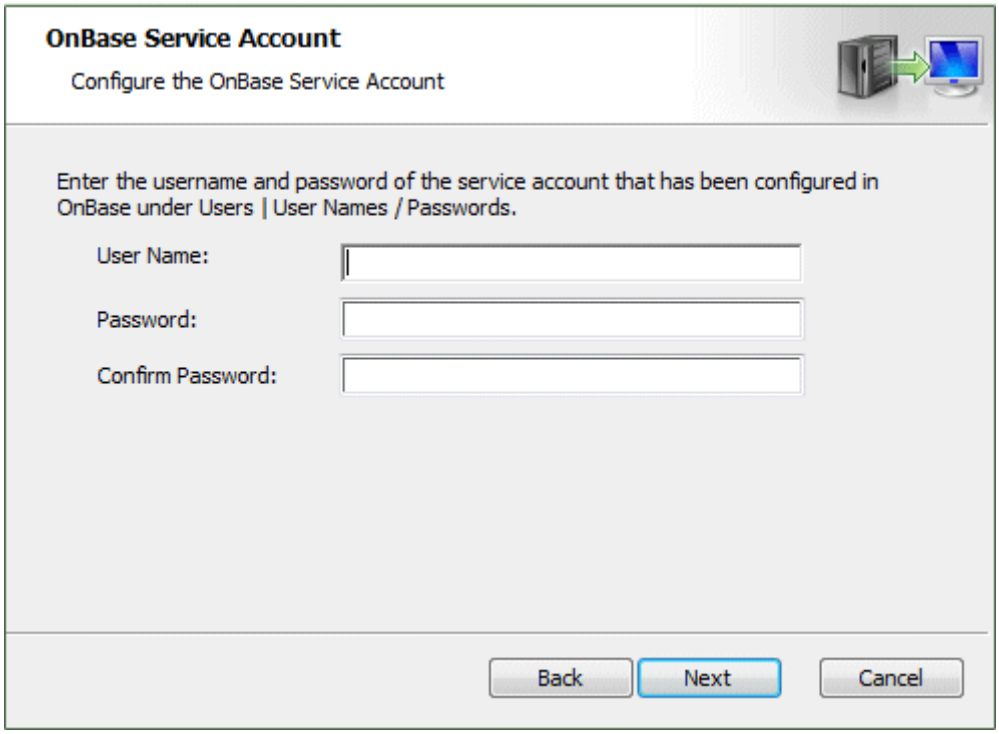
6. The **NT Service User Account** screen is displayed.



- If you wish to specify a domain account to run the Data Capture Server Windows Service, select **Specify domain account to run NT Service**. Then enter the user name and password for the domain account into the **User Name**, **Password**, and **Confirm Password** fields, and then click **Next**.
- If you do not wish to specify a domain account to run the Data Capture Server Windows Service (i.e., if you wish to use a local user account to run the NT Service), deselect **Specify domain account to run NT Service**. Then click **Next**.

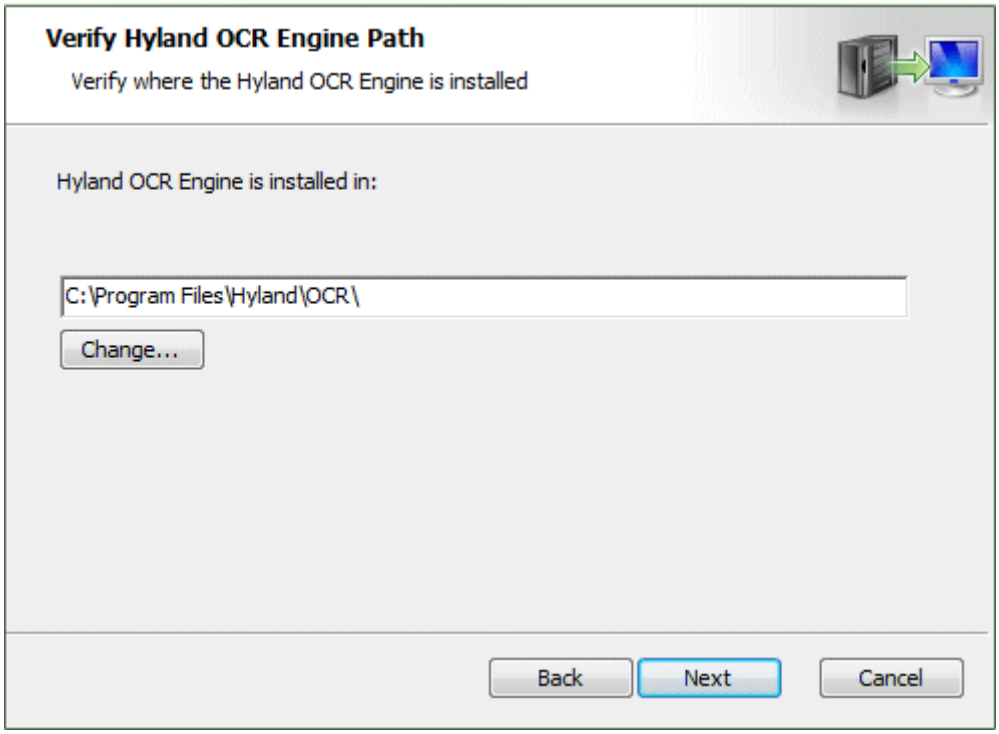
Tip: Once the installation is complete, you can still change which account will run the Data Capture Server Windows Service by using the Windows Administrative Tools (see the Windows help files for details on using the Administrative Tools).

7. The **OnBase Service Account** screen is displayed.



Enter the OnBase user name and password for a previously-created OnBase Service Account in the **User Name**, **Password**, and **Confirm Password** fields, and then click **Next**.

8. The **Verify Hyland OCR Engine Path** screen is displayed.

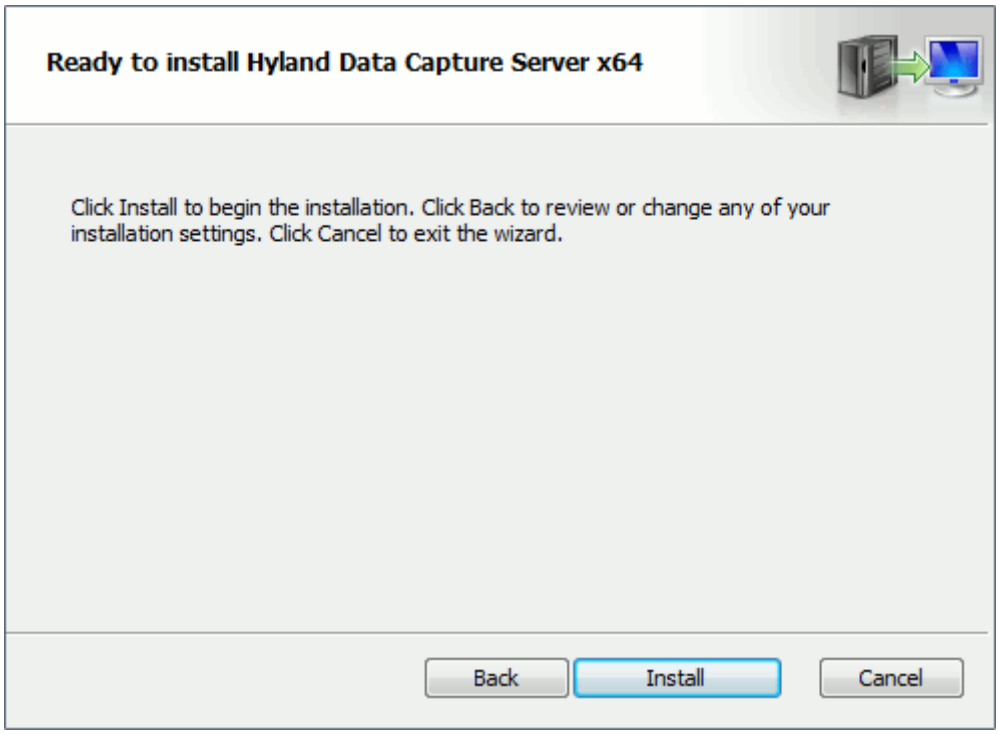


The path to the OCR engine must be specified in the configuration file for the Data Capture Server.

Verify the path to the folder containing the OCR installation files is correct. If it is not correct, manually enter the path to the correct folder or click **Change** to browse to it.

When finished, click **Next**.

9. The **Ready to install Hyland Data Capture Server x64** screen is displayed.

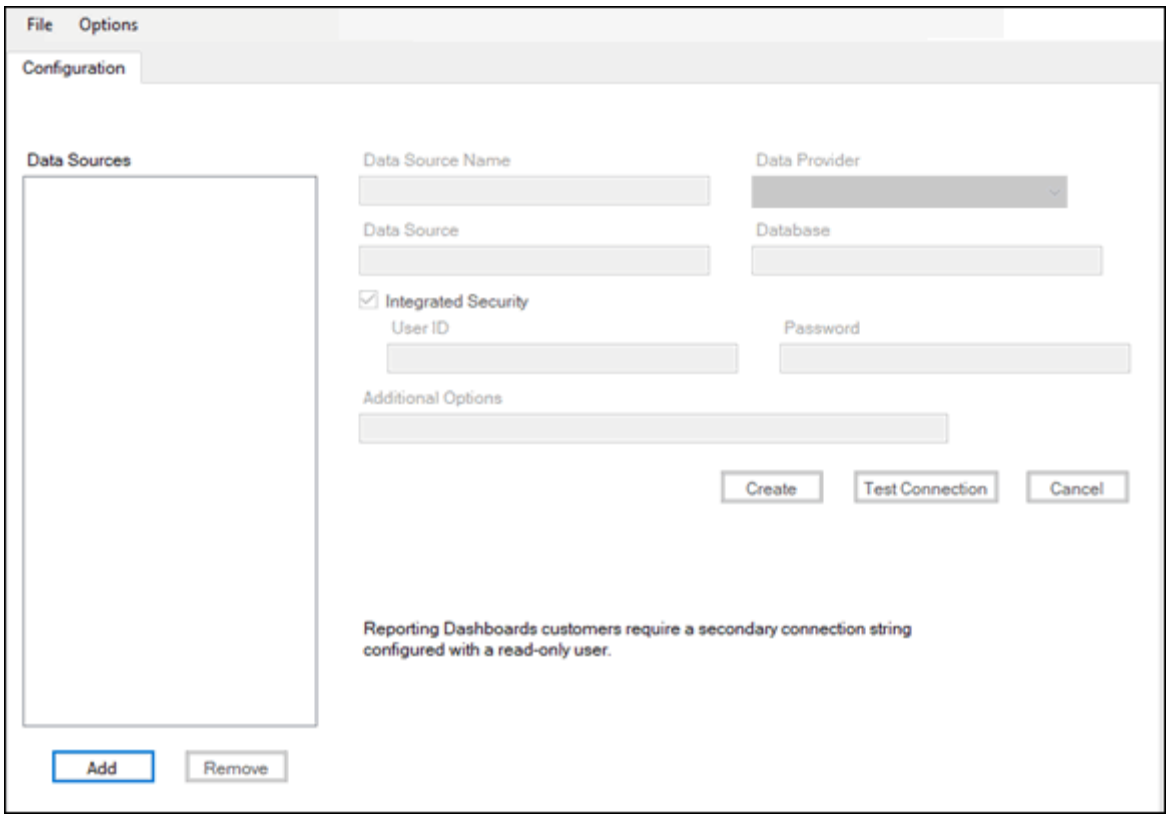


10. Click **Install** to begin the installation. The **Completed the Hyland Data Capture Server x64 Setup Wizard** dialog box is displayed after installation is completed.
11. Select **Launch Web Application Management Console** to open the Web Application Management Console and configure the connection string used to access the OnBase database.

Note: You must configure a valid connection string in order for the Data Capture Server to function correctly.

12. Click **Finish**. The connection string Configuration dialog box is displayed.

The connection strings dialog box allows you to configure connection strings.



13. To encrypt all connection strings configured in the application's .config file, ensure the **Options | Encrypt Connection Strings** menu option is selected. This option is automatically selected by default every time you open the connection strings dialog box, and the connection strings are encrypted when the .config file is saved.

Caution: It is strongly recommended to encrypt the connection strings. If they are not encrypted, all data source connection information is visible in the .config file and could expose sensitive data, including any entered database user names and passwords.

14. Click **Add** to start creating a new connection string. The fields on the right become available for interaction.
15. If you are configuring Reporting Dashboards with a secondary connection string with a read-only database user account, select **Options | Populate Read-Only User**. This optional feature populates the **User ID** and **Password** fields with the credentials for the read-only user. See the **Reporting Dashboards** documentation for more information.

    If you are creating a connection string for any other purpose, skip this step.

16. In the fields on the right, enter the following information about the data source:

Option	Description
Data Source Name	A unique name that you create to identify the connection string. **Note:** This identifying name may be different from the name of the actual database.
Data Provider	The data provider type used for the database. Select one of the following: • **System.Data.SqlClient**: Select this for a SQL Server database. • **Oracle.ManagedDataAccess.Client**: Select this for an Oracle database. **Note:** Only SQL Server and Oracle data providers can be used to connect to the OnBase database.

17. Depending on your selection for **Data Provider** in the previous step, enter the following database connection information:
    - If **System.Data.SqlClient** is selected (for a SQL Server database):

System.Data.SqlClient Option	Description
Data Source	Enter the server\instance name of the SQL Server instance hosting the database.
Database	Enter the name of the SQL Server database.

    - If **Oracle.ManagedDataAccess.Client** is selected (for an Oracle database):

Oracle.ManagedDataAccess.Client Option	Description
TNS Connection String	Select this option to enter a full TNS connection string to connect to the Oracle database. Deselect the option to use the connection name instead. **Note:** Selecting this option enables the **Host**, **Database**, **Protocol**, and **Port** fields for interaction.
Data Source	Enter the TNS name or connect descriptor of the Oracle database. **Note:** This field is available only if the **TNS Connection String** option is deselected.

Oracle.ManagedDataAccess.Client Option	Description
Host	Enter the host address of the Oracle database.
Database	Enter the name of the Oracle database.
Protocol	Select the protocol to use for connecting to the Oracle database. Options are: • **TCP** • **TCPS**
Port	Enter the port to use for connecting to the Oracle database.

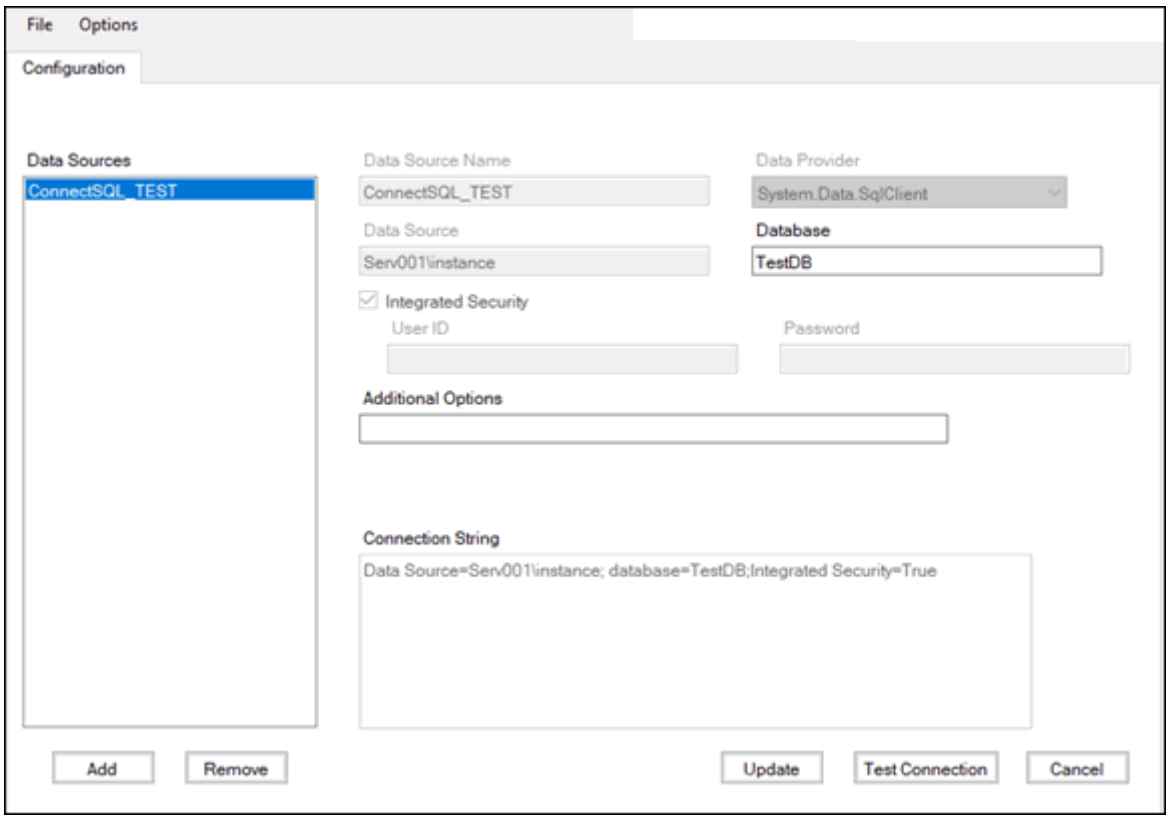
18. Enter the following security information:

Option	Description
Integrated Security	Select this option to use Windows Authentication to connect to the database. **Caution:** It is strongly recommended to use integrated security instead of a database account for authentication. To use integrated security, the Windows user connecting to the database must be the same user that is running the connecting server or service (such as the Application Server). This user must also be configured with the **configgp** role in the database.
User ID	The user name of the database user account accessing the database. **Note:** This user name is for a database user account, not a user account for OnBase.
Password	The password of the database user account accessing the database. **Note:** This password is for a database user account, not a user account for OnBase.

19. Enter any additional options.

Option	Description
Additional Options	Any additional options for the connection string. For more information on available connection string options and syntax, see the documentation for your database provider (SQL Server or Oracle).

20. Click **Test Connection** to test whether the entered information forms a valid connection string.
21. Click **Create** to save the information in the fields and create the connection string. The name of the data source is added to the **Data Sources** list on the left, and the connection string is displayed in the **Connection String** section.



22. Select **File | Save** to save the .config file.
23. Select **File | Close** to exit the connection strings dialog box.

24. Start the **Hyland Data Capture Server** Windows Service using the Windows Administrative Tools (see the Windows help files for details on using the Administrative Tools).

Note: If you are licensed for Intelligent Capture for AP, you must fully configure a scan queue for ICAP processing in both the OnBase Configuration module and the Data Capture Configuration Tool before you can start the **Hyland Data Capture Server** Windows Service. For more information, see the configuration procedures outlined in the **Intelligent Capture for AP** module reference guide.

Note: The **Hyland Data Capture Server** Windows Service is installed with a **Manual** Startup Type. If the machine running the service is restarted, the service will not restart automatically. To allow the service to restart automatically, change the Startup Type to **Automatic** or **Automatic (Delayed Start)**.

Command Line Installation

The Hyland Data Capture Server installer can be run from an installation CD or a local drive. If upgrading from a previous installation that used the Hyland Data Capture Server installer, it is not necessary to uninstall the old components before running the installer.

Features and Property Names

The following sections describe the feature and property names that can be applied to the command line to install and configure components contained in the Hyland Data Capture Server installer.

Features define the components that are installed. Properties define the configuration settings for the components that are installed.

Feature Names

You can control the installation of components from the command line using the **ADDLOCAL** property. To install a component, pass its feature name to installer using the **ADDLOCAL** property.

The **ADDLOCAL** property is appended to the end of the install command line, as shown here:

msiexec /i "Hyland Data Capture Server x64.msi" ADDLOCAL=DataCaptureServer

Note: Feature and Property names are case sensitive.

Property Names

When controlling the installation of components from the command line you must also configure the settings for each component you are installing by using the properties listed in the following table. The table below lists the property names available and the corresponding features that use them.

Property	Description
CREATE_DESKTOP_SHORTCUTS	This property is used to enable desktop shortcuts. To enable desktop shortcuts, set this property to **1**. To disable this option, leave this property empty. For example: **CREATE_DESKTOP_SHORTCUTS="1"** By default, this property is empty.
CREATE_MENU_SHORTCUTS	This property is used to enable menu shortcuts. To enable menu shortcuts, set this property to **1**. To disable this option, set this property to an empty string. For example: **CREATE_MENU_SHORTCUTS=""** By default, this property is set to **1**.
DATASOURCE	This property is used to specify the name of the data source used to connect to your OnBase Data Source. For example: **DATASOURCE="MyDatabase"**
NTSERVICE_USE_DOMAIN_ACCOUNT	This property is used to enable Active Directory and LDAP authentication. To enable Active Directory and LDAP authentication, set this property to **1**. To disable this option, set this property to an empty string. For example: **NTSERVICE_USE_DOMAIN_ACCOUNT=""** By default, this value is set to **1**.
NTSERVICE_USER	This property is used to specify the user account used for Active Directory and LDAP authentication. For example: **NTSERVICE_USER="JohnAdams"**
NTSERVICE_PASS	This property is used to specify the password for the user account used for Active Directory and LDAP authentication. For example: **NTSERVICE_PASS="MyPassword"**
DB_SERVICE_USER	This property is used to specify the user account used for the **OnBase Service Account**. For example: **DB_SERVICE_USER="JohnAdams"**

Property	Description
DB_SERVICE_PASS	This property is used to specify the password for the user account used for the **OnBase Service Account**. For example: **DB_SERVICE_PASS="MyPassword"**
CONFIGFILEPATH	The path to the configuration file where the ADO.NET connection string information is saved. For example, in a default installation the configuration file is located at: **CONFIGFILEPATH="C:\Program Files\Hyland\Services\Data Capture\Hyland.DataCapture.Server.exe.config"**
CONNECTIONSTRING	The ADO.NET connection string that should be used to connect to the OnBase database. For example: **CONNECTIONSTRING="Data Source=DOC-018272\SQLEXPRESS; database=DP-beta; User Id =username; Password=password"** For complete details on creating and configuring connections strings, see ADO.NET Connection Strings on page 63.
CONNECTIONSTRING_NAME	The name used to identify the ADO.NET connection string. This name must be different from the names of any other ADO.NET or ODBC data source connections configured in your system. For example: **CONNECTIONSTRING_NAME="My-Name"**
DATAPROVIDER	The data provider type used for the database. Enter one of the following values: **System.Data.SqlClient**: Select this for a SQL Server database. **Oracle.ManagedDataAccess.Client**: Select this for an Oracle database. Only SQL Server and Oracle data providers can be used to connect to the OnBase database. For example: **DATAPROVIDER="System.Data.SqlClient"**

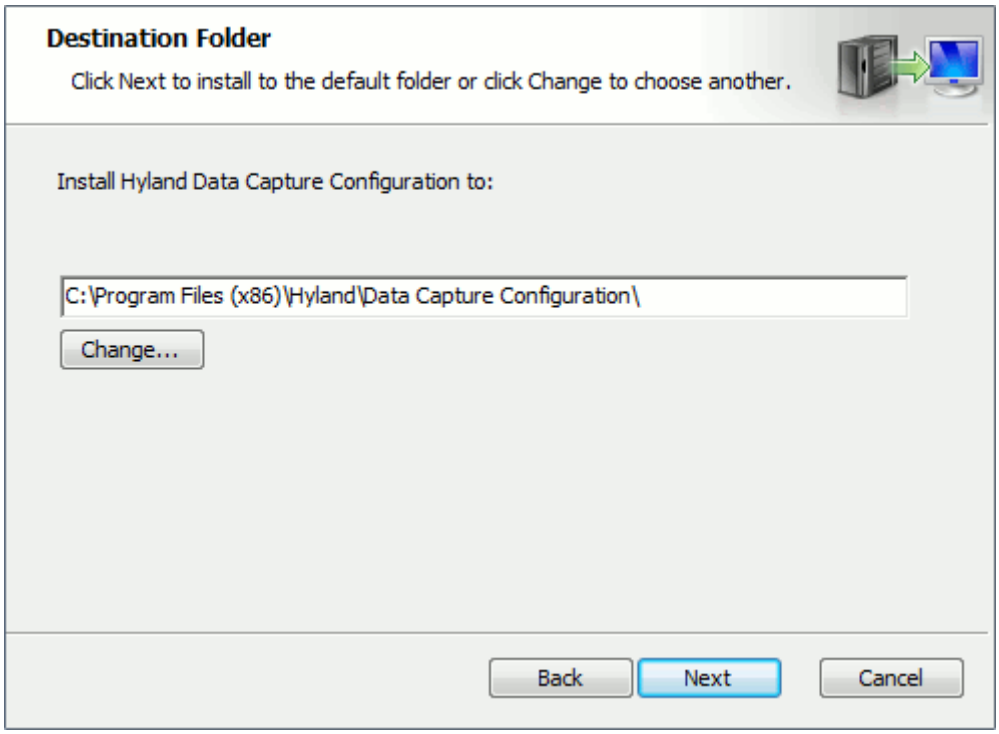
Installing the Data Capture Configuration Tool

The Hyland Data Capture Configuration Setup Wizard

The Data Capture Configuration Tool is installed using the Hyland Data Capture Configuration Setup wizard.

To install the Data Capture Configuration Tool:

1. Copy the Hyland Data Capture Configuration Setup wizard's executable (**Hyland Data Capture Configuration.msi**) to your machine.
2. Launch the setup wizard by double-clicking on the executable. The setup wizard's **Welcome** screen is displayed.
3. Click **Next** to proceed to the **Destination Folder** screen.

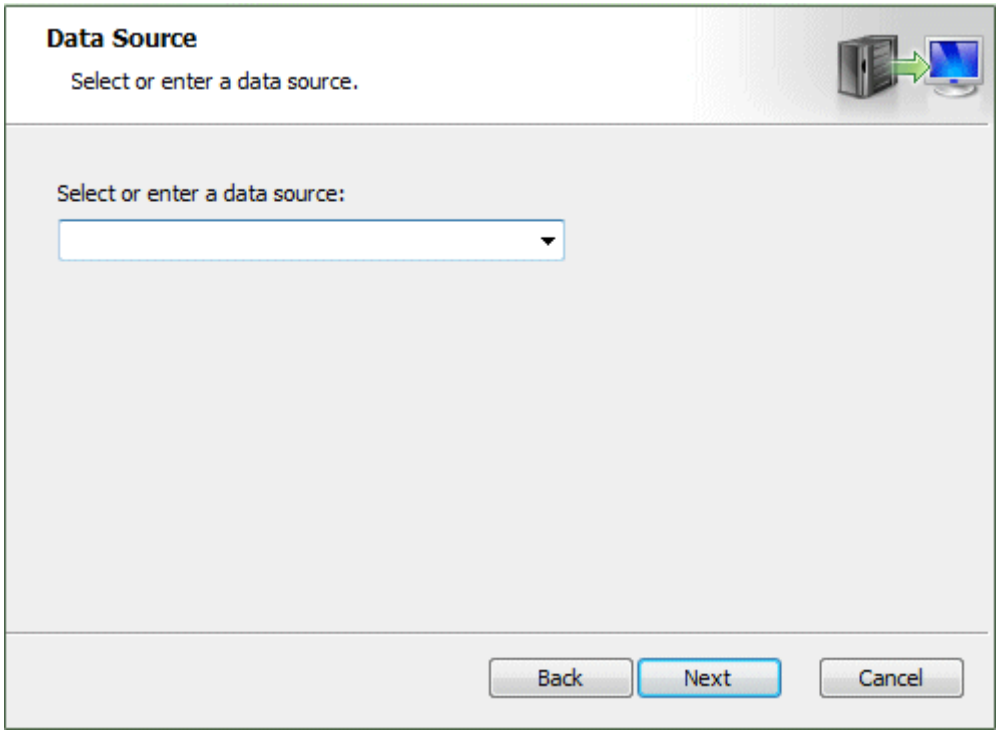


4. From the **Destination Folder** screen, you can select the location where the Data Capture Configuration files are installed on your machine.

   By default, the Data Capture Configuration files are installed in **C:\Program Files (x86)\Hyland\Data Capture Configuration**. To change this location, manually enter the path to the folder where you would like the Data Capture Configuration files to be installed or click **Change** to browse to the location.

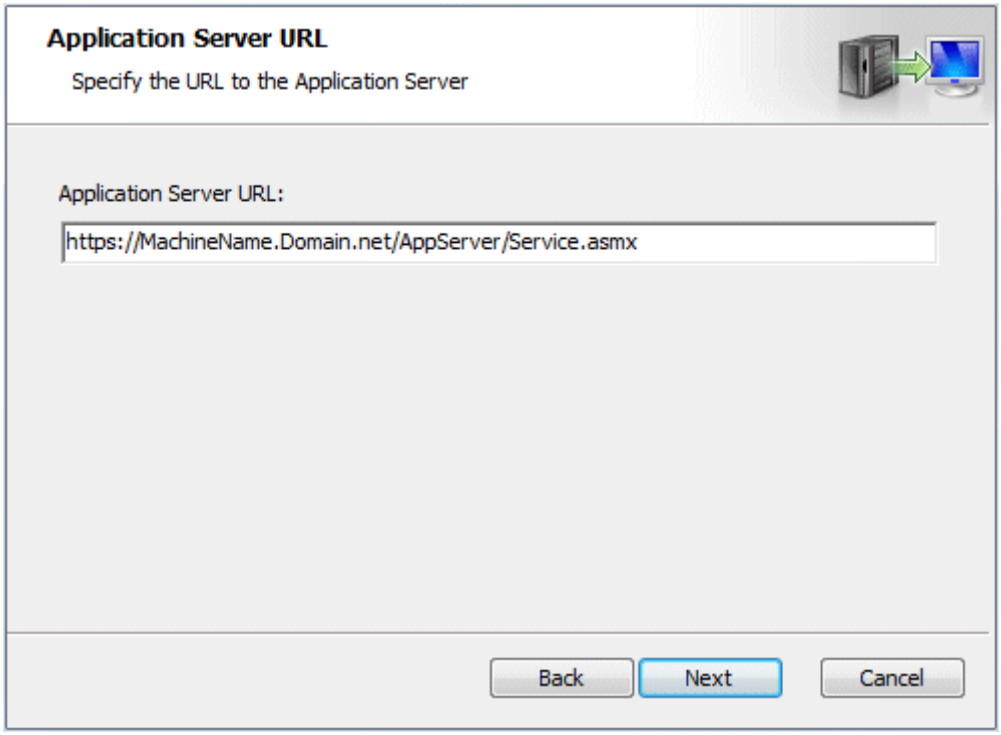
   Once the installation location is set, click **Next**.

5. The **Data Source** screen is displayed.



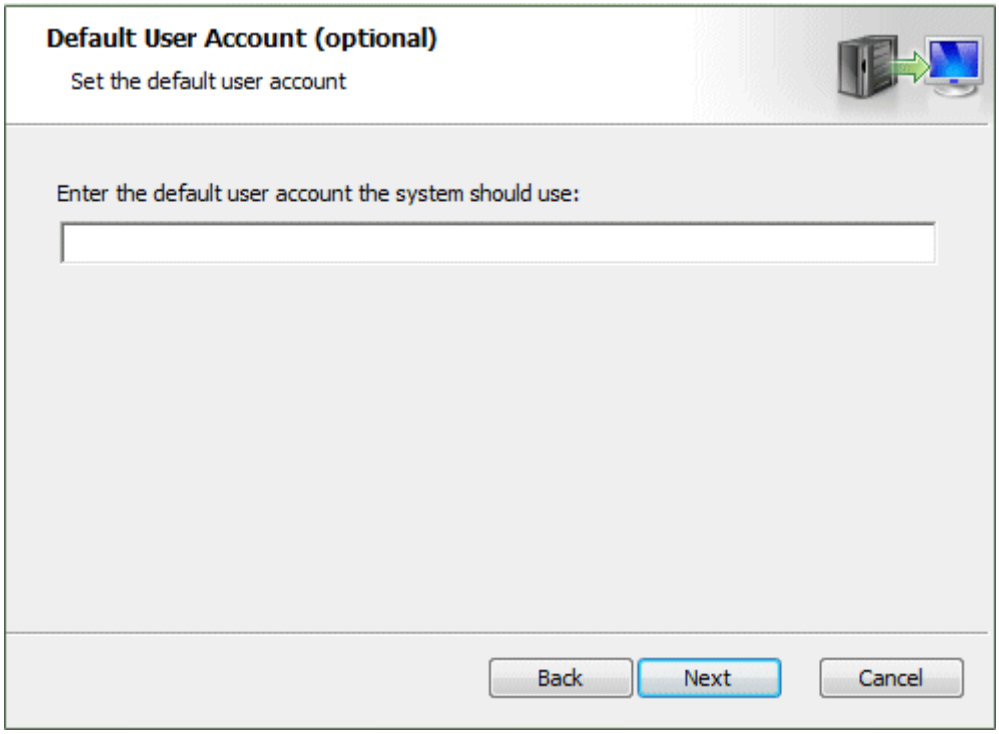
Select or enter the name of the data source used to connect to your OnBase database and then click **Next**.

6. The **Application Server URL** screen is displayed.



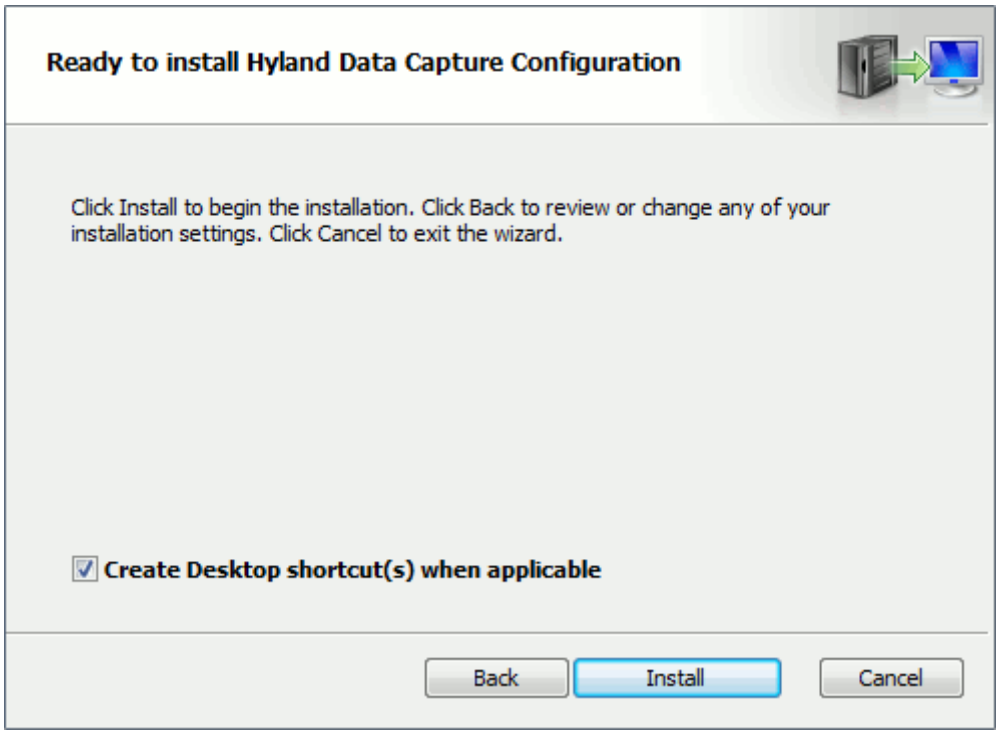
In the **Application Server URL** field, enter the full URL to the OnBase Application Server (e.g., **https://MachineName.Domain.net/AppServer/Service.asmx**). Once you have entered this, click **Next**.

7. The **Default User Account (optional)** screen is displayed.



- If you wish to specify a default user account, enter the user name for the account in the field, and then click **Next**. Once the installation is complete, this user name will be populated by default on the **OnBase Login** screen of the Data Capture Configuration Tool.
- If you do not wish to specify a default user account, leave the field blank and click **Next**.

8. The **Ready to install Hyland Data Capture Configuration** screen is displayed.



   If you wish to create a shortcut to the Data Capture Configuration Tool on the Windows desktop, select **Create Desktop shortcut(s) when applicable**.

Note: A shortcut to the Data Capture Configuration Tool is automatically created in the Windows Program Menu folder, regardless of the status of this setting.

9. Click **Install** to begin the installation.
10. Once the installation is complete, click **Finish** to close the setup wizard.

Command Line Installation

The Hyland Data Capture Configuration installer can be run from an installation CD or a local drive. If upgrading from a previous installation that used the Hyland Data Capture Configuration installer, it is not necessary to uninstall the old components before running the installer.

Features and Property Names

The following sections describe the feature and property names that can be applied to the command line to install and configure components contained in the Hyland Data Capture Configuration installer.

Features define the components that are installed. Properties define the configuration settings for the components that are installed.

Feature Names

You can control the installation of components from the command line using the **ADDLOCAL** property. To install a component, pass its feature name to installer using the **ADDLOCAL** property.

The **ADDLOCAL** property is appended to the end of the install command line, as shown here:

msiexec /i "Hyland Data Capture Configuration.msi" ADDLOCAL=DataCapture

Note: Feature and Property names are case sensitive.

Property Names

When controlling the installation of components from the command line you must also configure the settings for each component you are installing by using the properties listed in the following table. The table below lists the property names available and the corresponding features that use them.

Property	Description
APPLICATION_SERVER_URL	This property is used to set the URL to the **Service.asmx** page of the Application Server. For example: **APPLICATION_SERVER_URL="http://localhost/AppServer/Service.asmx"**
CREATE_DESKTOP_SHORTCUTS	This property is used to enable desktop shortcuts. To enable desktop shortcuts, set this property to **1**. To disable this option, leave this property empty. For example: **CREATE_DESKTOP_SHORTCUTS="1"** By default, this property is empty.
CREATE_MENU_SHORTCUTS	This property is used to enable menu shortcuts. To enable menu shortcuts, set this property to **1**. To disable this option, set this property to an empty string. For example: **CREATE_MENU_SHORTCUTS=""** By default, this property is set to **1**.
DATACAPTURECONFIGURATION_DEFAULTUSERNAME	This property is used to set the default OnBase user name to appear on the Data Capture Configuration Tool's logon screen. For example: **DATACAPTURECONFIGURATION_DEFAULTUSERNAME="Manager"**
DATASOURCE	This property is used to specify the name of the data source used to connect to your OnBase Data Source. For example: **DATASOURCE="MyDatabase"**

Change, Repair, or Remove an Installation

After initial installation, the setup program can be used to change, repair, or remove components from a previous installation. After launching **setup.exe** or the ***.msi** installation package, and clicking **Next** at the welcome dialog, the **Change, repair, or remove installation** dialog box is displayed.

Select the option for the actions you wish to perform:

Option	Description
Change	Add or remove components using the **Custom Setup** dialog. **Note:** This option is not available if the installer has no independently selectable features. The steps for adding selected components are the same as those under the Component Selection section of the installation instructions, if applicable to the installer. **Note: Change** does not allow you to alter configuration options originally set during a previous installation of components contained in the installer.
Repair	Repair errors in the most recent installation of the component, such as missing and corrupt files, shortcuts, and registry entries. **Note:** This option is not available from all installers. **Repair** does not include errors made in the configuration options set by the user during installation. For specific troubleshooting information regarding an installed component, see the module reference guide for that component.
Remove	Removes all previously installed components.

Post-Installation

Some configuration options for your Data Capture Server solution can be set and modified in the **Hyland.DataCapture.Configuration.exe.config** and **Hyland.DataCapture.Server.exe.config** files, which are created when you install the Data Capture Configuration Tool and Data Capture Server, respectively. For details on these options, see the sections below.

The Hyland.DataCapture.Configuration.exe.config File

The **Hyland.DataCapture.Configuration.exe.config** file contains some basic configuration options for the Data Capture Configuration Tool. This file is located in the same location where the Data Capture Configuration Tool is installed (by default, **C:\Program Files (x86)\Hyland\Data Capture Configuration**).

The Hyland.DataCapture.Configuration Element

This section contains configuration options for the Data Capture Configuration Tool. You can set the default OnBase logon credentials for the configuration tool, as well as the configuration tool's display language and culture settings.

<ServiceLocation> Attributes	**Description**
Domain	This option is set to the default domain name that is displayed/ entered when logging on to the Data Capture Configuration Tool using Interactive User Authentication with Active Directory and LDAP Authentication.
UseNTAuthentication	When set to **true**, the Data Capture Configuration Tool is configured to use Active Directory or LDAP Authentication.
ServicePath	This option is set to the default service path of the OnBase Application Server that the Data Capture Server connects to.
DataSource	This option is set to the default data source used to connect to your OnBase database.
Username	This option is set to the default OnBase user name that is used to log on to the Data Capture Configuration Tool.

<Settings> Attributes	**Description**
DisplayLanguage	The interface is displayed in the Windows default operating system language. To display the interface in a language different from the default operating system language, type the language code, such as **de-DE** for German or **fr-FR** for French. For more information on language codes, see Microsoft documentation on Windows Language Code Identifier. **Note:** This setting is commented out by default. This means that this setting cannot be used until you remove the **<!--** preceding **<DisplayLanguage>** and the **-->** following **</DisplayLanguage>**.

<Settings> Attributes	Description
Culture	The interface displays dates, time, currency, and numeric values using the default Windows locale settings configured in Regional and Language Options. To override the default Windows locale in the interface, set the Culture to an ISO code such as **de-CH** for German (Switzerland). **Note:** This setting is commented out by default. This means that this setting cannot be used until you remove the **<!--** preceding **<Culture>** and the **-->** following **</Culture>**. **Note:** The <**DisplayLanguage>** and <**Culture>** settings are not required to match, except when <**DisplayLanguage>** is configured as Arabic (Saudi Arabia). When <**DisplayLanguage>** is configured as **ar-SA**, <**Culture>** must also be configured as **ar-SA**. However, when <**Culture>** is configured as **ar-SA**, the <**DisplayLanguage>** is not required to be **ar-SA**.

The Hyland.DataCapture.Server.exe.config File

The **Hyland.DataCapture.Server.exe.config** file contains additional configuration options for the Data Capture Server. This file is located in the same location where the Data Capture Server is installed (by default, **C:\Program Files\Hyland\Services\Data Capture**).

The configSections Element

This section contains general information about the Data Capture Server configuration. These options should not be modified unless instructed to do so by Technical Support.

The appSettings Element

This section contains information specific to the Global Cloud Services (GCS) server.

An Intelligent Capture for AP solution must maintain an Internet connection to connect to a GCS server in order to report volume statistics to your solution provider. To configure your connection, configure the following settings in the **appSettings** configuration section:

1. Locate the **GCSUsername** key. Set the value to the user name for your administrative account on the server.
2. Locate the **GCSPassword** key. Set the value to the password for your administrative account on the server.

The Hyland.Diagnostics Element

This section contains information on logging and reporting. These options should not be modified unless instructed to do so by Technical Support.

The Hyland.DataCapture.LoggingConfiguration Element

This section contains logging information about the Data Capture Server Windows Service.

<Settings> Attributes	Description
loggingServiceType	This option sets where the information about the Data Capture Server Windows Service is logged. Valid values are: • **DiagnosticsConsole**. Information is logged to the Diagnostics Console. • **WindowsEventLog**. Information is logged to the Windows Event Viewer (under **Applications and Services Logs** | **OnBase Log**). • **TextFileLog**. Information is logged to a text file in either plain text or XML format. **Note:** When this option is set to **TextFileLog**, a separate text log file is created for each OCR process, and each unique process ID number is automatically included in the corresponding log file's name.
level	This option sets the level of information that is logged about the Data Capture Server Windows Service. Valid values are: • **Diagnostics**. The most verbose logging level. Messages of all types (e.g., error, warning, database, and trace viewer information) are displayed. All extracted capture data is also included. This level is most useful for troubleshooting. **Note:** When set to the **Diagnostics** level, general processing information (e.g., the document and batch being processed) is output in real time, while processing actions are consolidated and output in a document summary. • **Warning**. Database information and warning messages are displayed. • **Error**. The default logging level. Only error messages are displayed. • **None.** No information related to the Data Capture Server Windows Service is displayed.
processname	This option sets the name of the originating process that has been configured for logging (e.g., **Hyland.DataCapture.Server**).

<Settings> Attributes	Description
sourcename	This option sets the name that will be displayed as the source of the logged event (e.g., **Hyland Data Capture Server**). **Note:** When logging information to the Windows Event Viewer, the value of this option should match the value of the **sourcename** option configured for the **WindowsEventLogging** attribute within the **Hyland.Diagnostics** element.
testLogFormat	**Note:** This option is only respected when **loggingServiceType** is set to **TextFileLog**. This option sets the format of the information logged to a text file. Valid values are: • **PlainText**. Information is logged to a text file in plain text. • **XML**. Information is logged to a text file in XML.
filePath	**Note:** This option is only respected when **loggingServiceType** is set to **TextFileLog**. This option specifies the file path of the text file containing the logging information. The default location is the directory of the Data Capture Server executable (i.e., **C:\Program Files\Hyland\Services\Data Capture**).

The Hyland.DataCapture.Server Element

This section contains configuration information specific to the Data Capture Server.

Note: If you change the values for the **Datasource**, **Username**, and **Password** options, these new values will be removed from the **Hyland.DataCapture.Server.exe.config** file and encrypted the next time the Data Capture Server is restarted.

GeneralSettings Sub-Element

<GeneralSettings> Attributes	Description
Datasource	This option controls the name of the data source that is used to connect the Data Capture Server to your OnBase database.
Username	This option controls the user name of the OnBase service account that runs the Data Capture Server Windows Service.

<GeneralSettings> Attributes	Description
Password	This option controls the password of the OnBase service account that runs the Data Capture Server Windows Service.
PollInterval	This option controls the length of time (in seconds) that the Data Capture Server Windows Service waits before polling the Data Capture Server for new jobs to process and the batch status queues for unindexed batches of documents to process for the following modules: • Intelligent Capture for AP
DisplayLanguage	Content created by the Data Capture Server (e.g., verification reports) is displayed in the Windows default operating system language. To set the Data Capture Server to create content in a language different from the default operating system language, type the language code, such as **de-DE** for German or **fr-FR** for French. For more information on language codes, see http://msdn.microsoft.com/en-us/library/ms533052(VS.85).aspx. **Note:** The Data Capture Server Windows Service respects the default **DisplayLanguage** setting for the service account running the service. This service account may be different than the current Windows user account. When changing the **DisplayLanguage** setting under the current Windows user account, ensure that this setting is consistent with the desired locale under which the Data Capture Server Windows Service should be running.
Culture	The Data Capture Server creates dates, time, currency, and numeric values using the default Windows locale settings configured in Regional and Language Options. To override the default Windows locale settings for these created values, type the ISO code, such as **de-CH** for German (Switzerland). **Note:** The Data Capture Server Windows Service respects the default **Culture** setting for the service account running the service. This service account may be different than the current Windows user account. When changing the **Culture** setting under the current Windows user account, ensure that this setting is consistent with the desired locale under which the Data Capture Server Windows Service should be running.

OcrSettings Sub-Element

<OcrSettings> Attributes	Description
maxOcrPagesBeforeRestart	This option controls the maximum number of pages that can undergo OCR processing in a session before a new OCR worker process is automatically started. **Note:** This setting is based on the developer's recommendations for the OCR engine. It should not be changed unless you are instructed to do so by Technical Support.
maxOcrHoursBeforeRestart	This option controls the maximum number of hours that the OCR engine can run in a session before a new OCR worker process is automatically started. The value for this option can be set as a double number (i.e., a number with decimal places). For example, a period of 1 hour and 15 minutes would be set as **1.25**. **Note:** This setting is based on the developer's recommendations for the OCR engine. It should not be changed unless you are instructed to do so by Technical Support.
MaxThreadsPerWorker	This option controls the maximum number of documents each OCR worker can process simultaneously. The value for this option represents the divisor in the OCR worker formulas referenced in Licensing and OCR Worker Processes on page 18. By default, this value is set to 4. To reduce the number of threads per worker (and, consequently, to increase the total number of workers created), you must add the **MaxThreadsPerWorker** setting to the **Hyland.DataCapture.Server.exe.config** file and set it to a positive integer less than 4 (e.g., **MaxThreadsPerWorker="1"**). **Tip:** This setting may be useful for debugging purposes.
OnDemandWorkerCount	This option controls the total number of on-demand OCR workers that are created for OCR processing on the Data Capture Server. The value for this option overrides the value calculated by the OCR worker formula referenced in Institutional Licenses on page 18. To override the license setting (i.e., for debugging purposes for Interactive Data Capture or OCR for Application Enabler), you must add the **OnDemandWorkerCount** setting to the **Hyland.DataCapture.Server.exe.config** file and set it to a positive integer (e.g., **OnDemandWorkerCount="1"**). To revert to the value calculated by the OCR worker formula, set the **OnDemandWorkerCount** setting to **0**.

<OcrSettings> Attributes	Description
WorkerTimeoutInterval	This option controls the number of seconds the Data Capture Server Windows Service is permitted to take when sending data to an OCR worker process. If the data has not been sent within the allotted time, the process is abandoned. By default, the **WorkerTimeoutInterval** setting is set to **180** (i.e., 180 seconds = 3 minutes).
OcrEngineInstallPath	This option contains the path to the folder containing the OCR engine installation files. This value is set during installation.

InteractiveDataCaptureSettings Sub-Element

<InteractiveDataCaptureSettings> Attributes	Description
Enabled	This option controls whether Interactive Data Capture processing is allowed on the workstation. By default, this setting is set to **true**. If the OnBase environment is licensed for Interactive Data Capture but this setting is set to **false**, this instance of the Data Capture Server will not activate its Interactive Data Capture processor and users will not have access to Interactive Data Capture functionality.

FullPageOCRSettings Sub-Element

<FullPageOCRSettings> Attributes	Description
AdHocProcessingWorkstation	This option controls whether the Data Capture Server Windows Service automatically polls the **Awaiting Ad Hoc OCR** queue at regular intervals and processes any documents there. By default, the **AdHocProcessingWorkstation** setting is set to **true**. To disable the service's automatic processing of documents in the **Awaiting Ad Hoc OCR** queue, set **AdHocProcessingWorkstation** to **false**.

<FullPageOCRSettings> Attributes	Description
AdHocSkipDocumentsWithTextRendition	This option controls whether the Data Capture Server Windows Service, when polling the **Awaiting Ad Hoc OCR** queue, skips the processing of documents that already have a text rendition of the same file format that the assigned OCR format is configured to output, and removes these documents from the queue. By default, the **AdHocSkipDocumentsWithTextRenditions** setting is set to **false**, meaning that the Data Capture Server Windows Service still processes documents with text renditions in the **Awaiting Ad Hoc OCR** queue and replaces these existing text renditions with the new renditions generated by the OCR processing. To skip the processing of these documents and leave their existing text renditions intact, set the **AdHocSkipDocumentsWithTextRenditions** setting to **true**.
ProcessSpecificScanQueuesOnWorkstation	This option controls whether the workstation is limited to processing batches only in specific scan queues for Full Page OCR. This function can be used to load-balance Full Page OCR scan queues to specific workstations. By default, this setting is set to **false**, which allows the Data Capture Server to process batches in all scan queues enabled for Full Page OCR. If this setting is set to **true**, the specific scan queues to be processed must be specified in the **WorkstationSpecificScanQueueID** setting. **Note:** If this setting is set to **true** but no scan queues are specified in the **WorkstationSpecificScanQueueID** setting, the Data Capture Server will ignore all scan queues enabled for Full Page OCR and processing will not be performed.
WorkstationSpecificScanQueueID	**Note:** This setting is only respected if the **ProcessSpecificScanQueuesOnWorkstation** setting is set to **true**. This option sets the ID values of the scan queues that are allowed to be processed for Full Page OCR. This option can be set to multiple values separated by vertical bars ("|"). To specify the scan queues that can be used for processing, set the **WorkstationSpecificScanQueueID** setting to the ID values of the appropriate scan queues (e.g., **WorkstationSpecificScanQueueID="101|103|205"**).

IntelligentCaptureAPSettings Sub-Element

<IntelligentCaptureAPSettings> Attributes	Description
Enabled	This option controls whether Intelligent Capture for AP processing is allowed on the workstation. By default, this setting is set to **true**, and the Data Capture Server Windows Service automatically polls the ICAP processing queue at regular intervals and processes any documents there. If the OnBase environment is licensed for Intelligent Capture for AP but this setting is set to **false**, this instance of the Data Capture Server will not activate its Intelligent Capture for AP processor.
ConcurrentDocumentCount	This option sets the number of documents that the Intelligent Capture for AP engine can process at the same time. This setting allows control of how many resources the ICAP engine can use on the workstation. For example, if **ConcurrentDocumentCount="2"**, then this instance of the Intelligent Capture for AP engine can process up to two documents at the same time. By default, this setting is set to **0**, which sets the number of concurrent documents equal to the total number of CPU cores in the workstation, including hyper-threading. For virtual environments, this value is the number of cores assigned to the client VM, not the host machine. **Caution:** Setting this value to more than double the number of CPU cores available may cause performance degradation due to over-saturation of available resources.
SuspectValueThreshold	This option sets the highest limit at which a captured value's Suspect Level score is considered acceptable by the Intelligent Capture for AP engine (**0-100**). By default, the **SuspectValueThreshold** setting is set to **70**, meaning that a captured value must have a Suspect Level score of 70 or lower to be marked as acceptable. Any captured value with a score that exceeds 70 is marked as suspect and is sent for manual review via index verification. **Note:** Setting a threshold of **100** ensures that all captured values are marked as acceptable, because all results would fall below the threshold limit. Setting a threshold of **0** ensures that all captured values are marked as suspect, because all results would exceed the threshold limit.

<IntelligentCaptureAPSettings> Attributes	Description
RequirePORegExMatch	This option controls whether any **PO Number** extracted from a document during ICAP processing must be validated by a regular expression configured in the **PONumberRegExID** setting. If a **PO Number** can be matched to the configured regular expression without the use of tags, the **PO Number** can be used to trigger an AutoFill Keyword Set, which greatly increases the accuracy of vendor identification for PO invoices. By default, the **RequirePOReqExMatch** setting is not present in the **Hyland.DataCapture.Server.exe.config** file; it must be added manually. To reject any extracted **PO Number** values that do not match the regular expression configured in the **PONumberRegExID** setting, set the **RequirePOReqExMatch** setting to **true**. To accept extracted **PO Number** values without regard to the **PONumberRegExID** setting, set the **RequirePOReqExMatch** setting to **false**.
PONumberRegExID	**Note:** This setting is only respected if the **RequirePORegExMatch** setting is set to **true**. This option sets the ID value(s) of the regular expression(s) that any extracted **PO Number** values must match in order to be retained and used in conjunction with an AutoFill Keyword Set for accurate vendor identification during ICAP processing. This option can be set to multiple values separated by vertical bars ("|"). By default, the **PONumberRegExID** setting is not present in the **Hyland.DataCapture.Server.exe.config** file; it must be added manually. To specify the regular expression(s) any extracted **PO Number** values must match to be retained, set the **PONumberRegExID** setting to the ID value(s) of the appropriate regular expression(s) (e.g., **PONumberRegExID="135|215|324"**). **Note:** Regular expression ID values must be retrieved from your database. For more information, contact Database Services.

<IntelligentCaptureAPSettings> Attributes	Description
PerformLineItemExtraction	This option controls whether line item extraction is enabled during ICAP processing. When line item extraction is enabled, the **Line Item Extraction Verification** panel is displayed during index verification in the Unity Client. By default, the **PerformLineItemExtraction** setting is not present in the **Hyland.DataCapture.Server.exe.config** file; it must be added manually. In this default state, line item extraction is enabled for ICAP processing. To disable line item extraction, set the **PerformLineItemExtraction** setting to **false**. To enable line item extraction, set the **PerformLineItemExtraction** setting to **true**. **Tip:** It is recommended that line item extraction only be disabled for troubleshooting purposes.
ProcessSpecificScanQueuesOnWorkstation	This option controls whether the workstation is limited to processing batches only in specific scan queues for Intelligent Capture for AP. This function can be used to load-balance Intelligent Capture for AP scan queues to specific workstations. By default, this setting is set to **false**, which allows the Data Capture Server to process batches in all scan queues enabled for Intelligent Capture for AP. If this setting is set to **true**, the specific scan queues to be processed must be specified in the **WorkstationSpecificScanQueueID** setting. **Note:** If this setting is set to **true** but no scan queues are specified in the **WorkstationSpecificScanQueueID** setting, the Data Capture Server will ignore all scan queues enabled for Intelligent Capture for AP and processing will not be performed.
WorkstationSpecificScanQueueID	**Note:** This setting is only respected if the **ProcessSpecificScanQueuesOnWorkstation** setting is set to **true**. This option sets the ID values of the scan queues that are allowed to be processed for Intelligent Capture for AP. This option can be set to multiple values separated by vertical bars ("|"). To specify the scan queues that can be used for processing, set the **WorkstationSpecificScanQueueID** setting to the ID values of the appropriate scan queues (e.g., **WorkstationSpecificScanQueueID="101|103|205"**).

<IntelligentCaptureAPSettings> Attributes	Description
InvoiceDateRange	**Note:** This setting only applies to Keyword Types that have been mapped to the **Invoice Date** capture data type. This option defines a range of valid invoice dates. Intelligent Capture for AP uses this range to increase the accuracy and efficiency of ICAP Processing. Specifically, the current date and any prior dates that are within <**InvoiceDateRange**> day(s) of the current date are considered valid. **Note:** When **InvoiceDateRange="0"**, every date is treated as a valid date. By default, this option is set to **0**. If an identified invoice date is not within the defined range of valid dates, Intelligent Capture for AP will attempt to reformat the corresponding Keyword Value to fit within the range of valid dates. If an identified invoice date is not within the range of valid dates and that date cannot be reformatted to fit within the range of valid dates, the Keyword Value corresponding to that date will be marked as suspect. For example, if **InvoiceDateRange="31"**, and the current date is February 15, 2017, then this instance of the Intelligent Capture for AP engine will treat any prior date that is within 31 days of February 15, 2017 as valid. Continuing the example from above, if an invoice date is read as 01/02/2017, Intelligent Capture for AP will set the corresponding Keyword Value to **02/01/2017**. If an invoice date is read as 12/15/2015, the date cannot be reformatted to fit within the range and, therefore, the Keyword Value corresponding to that date will be marked as suspect.
LogTimerInterval	This option must not be modified unless instructed to do so by Technical Support.
BlockSize	This option must not be modified unless instructed to do so by Technical Support.

IntelligentClassificationSettings Sub-Element

This sub-element and its related attributes are no longer used.

FullTextOCRSettings Sub-Element

This sub-element and its related attributes are no longer used.

AdvancedCaptureSettings Sub-Element

<AdvancedCaptureSettings> Attributes	Description
AnyDocBatchUNCPath	This option controls the path to the folder that holds the individual files from the batches that have been configured for AnyDoc processing with Infiniworx. Once the Data Capture Server moves these files to the specified folder, they remain here until they are picked up by Infiniworx for processing. The value for the **AnyDocBatchUNCPath** setting must be a network location accessible to both your Data Capture Server and your Infiniworx solution. For more information on configuring batches for AnyDoc processing with Infiniworx, see the **Document Imaging** module reference guide. For more information on Infiniworx processing, see the **Infiniworx User Guide**.

BarCodeRecognitionSettings Sub-Element

<BarCodeRecognitionSettings> Attributes	Description
Enabled	This option controls whether bar code processing is allowed on the workstation. When this setting is set to **true**, the Data Capture Server Windows Service automatically polls the **Awaiting Bar Code Processing** queue at regular intervals and processes any documents there. By default, this setting is set to **false**. If the OnBase environment has the appropriate licensing and software installed for bar code processing but this setting is set to **false**, this instance of the Data Capture Server will not activate its bar code processor.

<BarCodeRecognitionSettings> Attributes	Description
ConcurrentCount	This option sets the number of documents that can undergo bar code processing simultaneously on the Data Capture Server. For example, if **ConcurrentCount="2"**, then bar code processing can be performed on up to two documents at the same time. By default, this setting is set to **0**, which sets the number of concurrent documents equal to the half of the number of CPU cores in the workstation, including hyper-threading. For virtual environments, this value is the number of cores assigned to the client VM, not the host machine. **Caution:** Setting this value to more than double the number of CPU cores available may cause performance degradation due to over-saturation of available resources.
ProcessSpecificScanQueuesOnWorkstation	This option controls whether the workstation is limited to processing batches only in specific scan queues for bar code processing. This function can be used to load-balance bar code processing scan queues to specific workstations. By default, this setting is set to **false**, which allows the Data Capture Server to process batches in all scan queues enabled for bar code processing. If this setting is set to **true**, the specific scan queues to be processed must be specified in the **WorkstationSpecificScanQueueID** setting. **Note:** If this setting is set to **true** but no scan queues are specified in the **WorkstationSpecificScanQueueID** setting, the Data Capture Server will ignore all scan queues enabled for bar code processing and processing will not be performed.
WorkstationSpecificScanQueueID	**Note:** This setting is only respected if the **ProcessSpecificScanQueuesOnWorkstation** setting is set to **true**. This option sets the ID values of the scan queues that are allowed to be processed for bar codes. This option can be set to multiple values separated by vertical bars ("|"). To specify the scan queues that can be used for processing, set the **WorkstationSpecificScanQueueID** setting to the ID values of the appropriate scan queues (e.g., **WorkstationSpecificScanQueueID="101|103|205"**).

<BarCodeRecognitionSettings> Attributes	Description
LogDirectory	This setting specifies the file path of the text file containing the logging information for bar code processing. By default, this setting is blank and no log files are created. **Note:** It is recommended that this option is left blank unless you are troubleshooting. When you specify a **LogDirectory**, log files are created and bar code processing may take considerably longer to run.

ImageProcessingSettings Element Attributes

The **ImageProcessingSettings** element contains configuration options that control how image processing is conducted on this instance of the Data Capture Server.

```
<ImageProcessingSettings Enabled="false" ConcurrentCount="0"
ProcessSpecificScanQueuesOnWorkstation="false" JPEGCompressionQuality=""
WorkstationSpecificScanQueueID=""/>
```

The following attributes are found in the **ImageProcessingSettings** element:

<ImageProcessingSettings> Attributes	Description
Enabled	This setting controls whether image processing is enabled on this instance of the Data Capture Server. By default, this setting is set to **false**, and this instance of the Data Capture Server does not perform image processing. If this setting is set to **true**, the Data Capture Server Windows Service automatically polls the **Awaiting Image Processing** queue at regular intervals and processes any documents there.

<ImageProcessingSettings> Attributes	Description
ConcurrentCount	This setting sets the number of documents that can undergo image processing simultaneously on this instance of the Data Capture Server. By default, this setting is set to **0**, which sets the number of concurrent documents equal to the total number of CPU cores in the workstation, including hyper-threading. For virtual environments, this value is the number of cores assigned to the client VM, not the host computer. **Caution:** Setting this value to more than double the number of CPU cores available may cause performance degradation due to over-saturation of available resources. For example, consider a workstation with a total number of three CPU cores, including hyper-threading. If the value for **ConcurrentCount** is **0**, then image processing can be performed on up to three documents at the same time. If the value for **ConcurrentCount** is **2**, then image processing can be performed on up to two documents at the same time. In this example, setting **ConcurrentCount** to a value greater than **6** may cause performance degradation due to over-saturation of available resources.
ProcessSpecificScanQueues OnWorkstation	This setting controls whether the workstation is limited to processing batches in specific scan queues enabled for image processing. This setting can be used to load-balance image processing scan queues to specific workstations. By default, this setting is set to **false**, which allows this instance of the Data Capture Server to process batches in all scan queues enabled for image processing. If this setting is set to **true**, you must specify the scan queues to be processed using the **WorkstationSpecificScanQueueID** setting. **Note:** If this setting is set to **true,** but no scan queues are specified in the **WorkstationSpecificScanQueueID** setting, this instance of the Data Capture Server ignores all scan queues enabled for image processing.

<ImageProcessingSettings> Attributes	Description
JPEGCompressionQuality	This setting controls the compression of images created from non-image files during the **Convert Documents to Image File Format** process. **Note:** This setting has no impact on image files that enter the **Convert Documents to Image File Format** process. It only impacts image files that are generated from non-image files during the process. For more information on the **Convert Documents to Image File Format** process, see the **Document Imaging** module reference guide. This setting is only respected when **Use JPEG compressed TIFF as default color image format** is enabled. For more information on the **JPEG compressed TIFF as default color image format** option, see the **System Administration** module reference guide. Set this setting to a value from **1** to **100**. For example, **JPEGCompressionQuality="80**". Higher numbers yield higher quality images, larger file sizes, and lower compression. Lower numbers yield lower quality images, smaller file sizes, and higher compression. If no value, a value less than 1, or a value greater than 100 is entered, the Data Capture Server uses a default compression quality value of 70.
WorkstationSpecificScan QueueID	This setting is only respected if **ProcessSpecificScanQueuesOnWorkstation** is set to **true**. This setting specifies the ID values of the scan queues to be used for image processing. To specify the scan queues that can be used for processing, set the value to the ID values of the appropriate scan queues, separating each ID value with a vertical bar (|). For example, **WorkstationSpecificScanQueueID="101|103|205"**.

XMLImportSetting Sub-Element

<XMLImportSetting> Attributes	Description
Enabled	This option controls whether the Data Capture Server will process Brainware XML result files that are exported to a specified polling location. **Note:** For more information on the Integration for Brainware, including information on specifying a polling location, see the **Integration for Brainware Deployment Guide**. By default, this setting is set to **false**, and this instance of the Data Capture Server will not process Brainware XML result files. If this setting is set to **true**, the Data Capture Server Windows Service automatically polls the specified polling location at regular intervals and processes any Brainware XML result file found there. For more information, see the **Integration for Brainware Deployment Guide**.
ConcurrentDocumentCount	This option sets the number of Brainware XML result files that the Data Capture Server retains for processing each time it polls the specified polling location. **Note:** For more information on the Integration for Brainware, including information on specifying a polling location, see the **Integration for Brainware Deployment Guide**. For example, if **ConcurrentCount="100"**, then the Data Capture Server will retain 100 Brainware XML result files for processing each time it polls the specified polling location. By default, this setting is set to **200**.

The Startup Element

This section contains information on the Microsoft .NET version used by the Data Capture Server. You should not modify these options unless instructed to do so by Technical Support.

The Runtime Element

This section contains information on the Microsoft .NET garbage collector process used by the Data Capture Server. You should not modify these options unless instructed to do so by Technical Support.

The Hyland.DataCapture.Server.Properties.Settings Element

This section contains information specific to the OCR worker processes running on the Data Capture Server.

<setting> Attributes	Description
OcrEndpointConfigureWaitTime	This option controls the length of time (in seconds) that the Data Capture Server Windows Service waits before attempting to configure a new OCR worker process. **Tip:** Consider increasing the value of this setting if you encounter endpoint configuration errors on slower or busier servers.

The baseAddresses Element

This section contains both the tcp and http addresses of the Data Capture Server (location and port). These addresses allow the Application Server to find and communicate with the Data Capture Server.

ADO.NET Connection Strings

The default database connection method for OnBase servers and applications requires ADO.NET connection strings. An ODBC connection is still required for the OnBase Client and the OnBase Configuration module.

A connection string contains the information required to connect to a database, and each connection string has a unique identifying name for that data source connection. This unique data source name is referenced by other applications to connect to the database configured in the connection string.

Data source connection strings are configured in the configuration file of the application used to connect directly to the database. For example, the **connectionStrings** element in the Application Server web.config file contains a data source connection string for each database that the Application Server accesses. Other applications using the Application Server, such as the Unity Client or Web Server, access the database by referencing the unique data source name from the relevant connection string.

This section includes the following information for connection strings:

- Connection String Components on page 64.
- Managing Connection Strings Using The Web Application Management Console on page 67.

Connection String Components

This section explains the required components in an ADO.NET connection string used to connect an application to a database. Examples of connection strings are provided at the end of the section.

Note: ADO.NET and connection strings are Microsoft .NET Framework concepts, but each database provider (such as SQL Server or Oracle) has its own implementation of ADO.NET. For more information on building a valid connection string or using additional options, see your database provider's documentation on connection strings.

It is important to note the following considerations for connection strings:

- It is strongly recommended to use integrated security instead of a database account for authentication. To use integrated security, the Windows user connecting to the database must be the same user that is running the connecting server or service (such as the Application Server). This user must also be configured with the **configgp** role in the database.
- It is strongly recommended to encrypt the connection strings. If they are not encrypted, all data source connection information is visible in the .config file, including the database user names and passwords in the connection strings.

  Encryption can be performed using the **aspnet_regiis** command line utility for IIS or using Web Application Management Console. See the documentation from Microsoft for more information on using the ASP.NET IIS Registration Tool. See the **Web Application Management Console** module reference guide for more information on encrypting connection strings using the OnBase Web Application Management Console.

See the following subsections for information on each element of a connection string:

- Name on page 64
- ConnectionString on page 65
- ProviderName on page 66

For examples of connection strings for all supported database platforms, see Connection String Examples on page 66.

Name

The **name** element is a unique name that you create to identify the data source connection string.

Note: This identifying name may be different from the name of the actual database, which is specified in the **Data Source** and **database** attributes.

Example:

```
name="DataSourceName"
```

ConnectionString

The **connectionString** element contains connection information for the database. The tokens needed for the connection information depend on the database platform used.

SQL Server Connection String Tokens

Use the following connection string tokens in the **connectionString** element when using a SQL Server database.

Token	Description
Data Source	The server\instance name of the SQL Server instance hosting the database.
Database	The name of the database in SQL Server.
User Id	The user name of the user account accessing the database. This is a database user account, not a user account in OnBase. **Note:** If using integrated security, the **User Id** token is not used.
Password	The password of the user account accessing the database. This is a database user account, not a user account in OnBase. **Note:** If using integrated security, the **Password** token is not used.
Integrated Security	A **true** or **false** value specifying whether to use integrated security to access the database.

Oracle Connection String Tokens

Use the following connection string tokens in the **connectionString** element when using an Oracle database.

Token	Description
Data Source	The TNS name or connect descriptor of the database.
User Id	The user name of the user account accessing the database. This is a database user account, not a user account in OnBase. **Note:** If using OS Authentication, enter a forward slash in place of the user name. For example: `User Id=/`
Password	The password of the user account accessing the database. This is a database user account, not a user account in OnBase. **Note:** If using OS Authentication, the **Password** token is not used.

ProviderName

The **providerName** element specifies the data provider type used for the database. Only SQL Server and Oracle data providers can be used to connect to the OnBase database.

Note: Values for the **providerName** element are case-sensitive.

Use one of the following, depending on the database platform used:

Database Platform	ProviderName Element
SQL Server	`providerName="System.Data.SqlClient"`
Oracle	`providerName="Oracle.ManagedDataAccess.Client"`

Connection String Examples

The following sections provide examples of connection strings for SQL Server and Oracle.

Note: The following examples are provided for illustration purposes only. Each database provider has its own implementation of ADO.NET and connection strings, and your particular situation may require including different or additional options than the ones illustrated in these examples. For more information on building a valid connection string or using additional options, see your database provider's documentation on connection strings.

SQL Server Examples

This connection string would create a data source called **ConnectSQL**, used to connect to the database **TestDB** hosted on a SQL Server instance named **Serv001\instance**:

```
<connectionStrings>
   <add name="ConnectSQL" connectionString="Data Source=Serv001\instance;
   Database=TestDB;User Id=username;Password=password"
   providerName="System.Data.SqlClient"/>
</connectionStrings>
```

Similarly, this example would connect to the same database, but it would use integrated security instead of database user authentication:

```
<connectionStrings>
   <add name="ConnectSQL" connectionString="Data Source=Serv001\instance;
   Database=TestDB;Integrated Security=true;"
   providerName="System.Data.SqlClient"/>
</connectionStrings>
```

Oracle Examples

This connection string would create a data source is called **ConnectOracle**, used to connect to the Oracle database **TestDB**:

```
<connectionStrings>
   <add name="ConnectOracle" connectionString="Data Source=TestDB;
   User Id=username;Password=password"
   providerName="Oracle.ManagedDataAccess.Client"/>
</connectionStrings>
```

Similarly, this example would connect to the same database, but it would use OS Authentication instead of database user authentication:

```
<connectionStrings>
   <add name="ConnectOracle" connectionString="Data Source=TestDB;
   User Id=/" providerName="Oracle.ManagedDataAccess.Client"/>
</connectionStrings>
```

The following example would connect to the same database, but it uses the connect descriptor for the Oracle database:

```
<connectionStrings>
   <add name="ConnectOracle"
   connectionString="Data Source=(DESCRIPTION=(ADDRESS=(PROTOCOL=TCP)
   (HOST=hostname)(PORT=1521))(CONNECT_DATA=(SERVICE_NAME=TestDB)));
   User Id=username;Password=password"
   providerName="Oracle.ManagedDataAccess.Client"/>
</connectionStrings>
```

Managing Connection Strings Using The Web Application Management Console

You can use the Web Application Management Console to create, modify, and delete data source connection strings to connect to the OnBase database. This utility also allows you to encrypt all of the connection string information in the configuration file for security purposes.

Note: ADO.NET and connection strings are Microsoft .NET Framework concepts, but each database provider (such as SQL Server or Oracle) has its own implementation of ADO.NET. For more information on building a valid connection string or using additional options, see your database provider's documentation on connection strings.

It is important to note the following considerations for connection strings:

- It is strongly recommended to use integrated security instead of a database account for authentication. To use integrated security, the Windows user connecting to the database must be the same user that is running the connecting server or service (such as the Application Server). This user must also be configured with the **configgp** role in the database.
- It is strongly recommended to encrypt the connection strings. If they are not encrypted, all data source connection information is visible in the configuration file, including the database user names and passwords in the connection strings.

The following sections apply to managing connection strings using the Web Application Management Console:

- Creating a Connection String on page 68.
- Modifying a Connection String on page 73.
- Deleting a Connection String on page 75.

Creating a Connection String

You can use the Web Application Management Console to create and encrypt data source connection strings.

To create a new connection string:

1. In the Web Application Management Console, open the Application Server web.config file by clicking **Open Web Application** and selecting the Application Server from the list of web applications.

Note: Opening the Application Server web.config file is required to access the connection strings configuration utility, even if you are not configuring the Application Server.

2. Select **Connection Strings | View Contexts**. The connection strings dialog box is displayed.

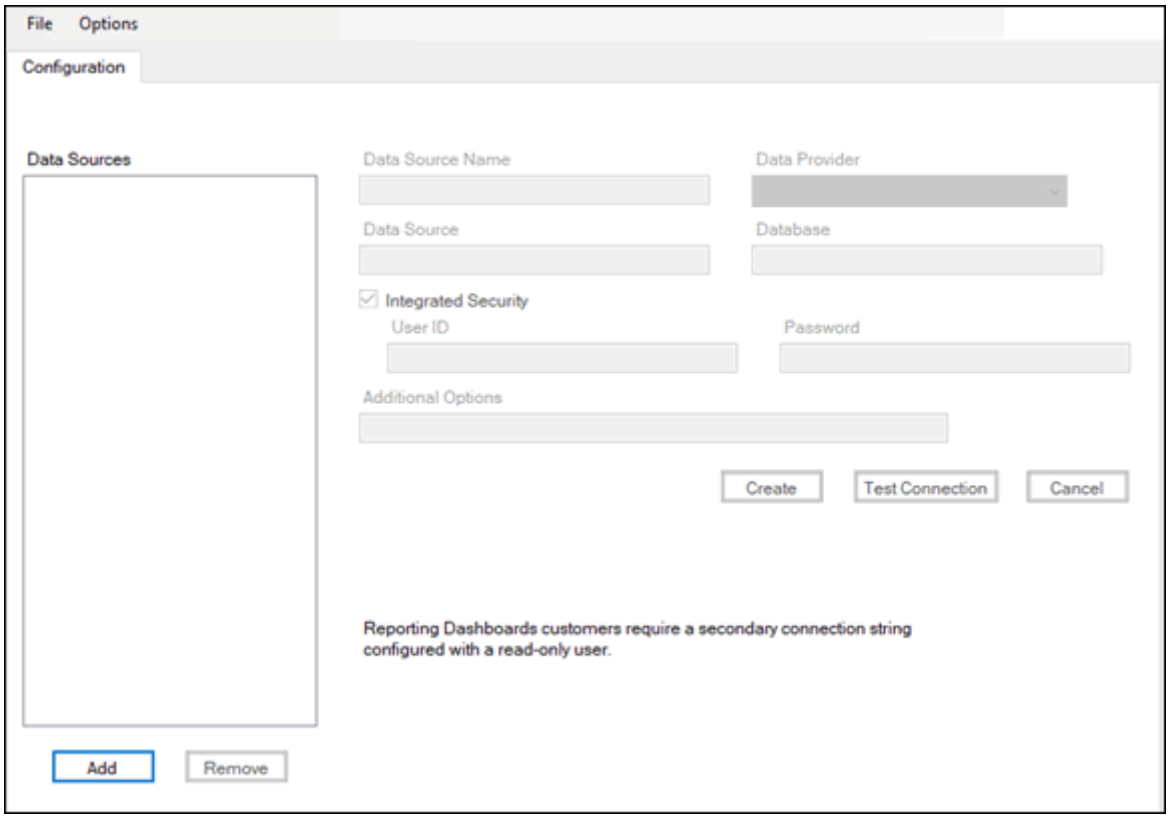
   If you are configuring an application or service other than the Application Server, follow these additional steps to open the appropriate .config file:

   a. Select **File | Configuration Path**.

   b. Browse to open the .config file for the application or service.

Note: You can also apply the **-CONFIGPATH** command line switch to the Web Application Management Console shortcut to directly open a .config file in the connection strings dialog box. See the command line switches section of the **Web Application Management Console** documentation for more information.

The connection strings dialog box allows you to configure connection strings.



3. To encrypt all connection strings configured in the application's .config file, ensure the **Options | Encrypt Connection Strings** menu option is selected. This option is automatically selected by default every time you open the connection strings dialog box, and the connection strings are encrypted when the .config file is saved.

Caution: It is strongly recommended to encrypt the connection strings. If they are not encrypted, all data source connection information is visible in the .config file and could expose sensitive data, including any entered database user names and passwords.

4. Click **Add** to start creating a new connection string. The fields on the right become available for interaction.
5. If you are configuring Reporting Dashboards with a secondary connection string with a read-only database user account, select **Options | Populate Read-Only User**. This optional feature populates the **User ID** and **Password** fields with the credentials for the read-only user. See the **Reporting Dashboards** documentation for more information.

   If you are creating a connection string for any other purpose, skip this step.

6. In the fields on the right, enter the following information about the data source:

Option	Description
Data Source Name	A unique name that you create to identify the connection string. **Note:** This identifying name may be different from the name of the actual database.
Data Provider	The data provider type used for the database. Select one of the following: • **System.Data.SqlClient**: Select this for a SQL Server database. • **Oracle.ManagedDataAccess.Client**: Select this for an Oracle database. **Note:** Only SQL Server and Oracle data providers can be used to connect to the OnBase database.

7. Depending on your selection for **Data Provider** in the previous step, enter the following database connection information:
   - If **System.Data.SqlClient** is selected (for a SQL Server database):

System.Data.SqlClient Option	Description
Data Source	Enter the server\instance name of the SQL Server instance hosting the database.
Database	Enter the name of the SQL Server database.

   - If **Oracle.ManagedDataAccess.Client** is selected (for an Oracle database):

Oracle.ManagedDataAccess.Client Option	Description
TNS Connection String	Select this option to enter a full TNS connection string to connect to the Oracle database. Deselect the option to use the connection name instead. **Note:** Selecting this option enables the **Host**, **Database**, **Protocol**, and **Port** fields for interaction.
Data Source	Enter the TNS name or connect descriptor of the Oracle database. **Note:** This field is available only if the **TNS Connection String** option is deselected.

Oracle.ManagedDataAccess.Client Option	Description
Host	Enter the host address of the Oracle database.
Database	Enter the name of the Oracle database.
Protocol	Select the protocol to use for connecting to the Oracle database. Options are: • **TCP** • **TCPS**
Port	Enter the port to use for connecting to the Oracle database.

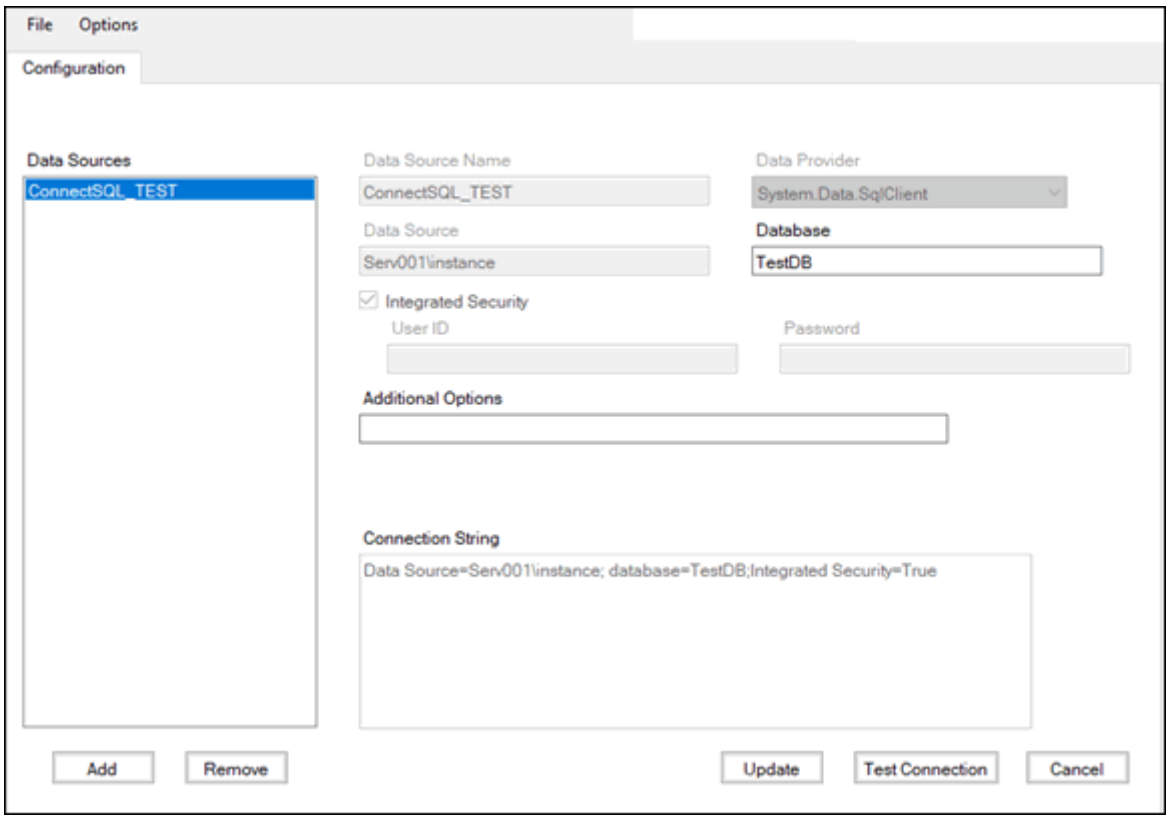
8. Enter the following security information:

Option	Description
Integrated Security	Select this option to use Windows Authentication to connect to the database. **Caution:** It is strongly recommended to use integrated security instead of a database account for authentication. To use integrated security, the Windows user connecting to the database must be the same user that is running the connecting server or service (such as the Application Server). This user must also be configured with the **configgp** role in the database.
User ID	The user name of the database user account accessing the database. **Note:** This user name is for a database user account, not a user account for OnBase.
Password	The password of the database user account accessing the database. **Note:** This password is for a database user account, not a user account for OnBase.

9. Enter any additional options.

Option	Description
Additional Options	Any additional options for the connection string. For more information on available connection string options and syntax, see the documentation for your database provider (SQL Server or Oracle).

10. Click **Test Connection** to test whether the entered information forms a valid connection string.
11. Click **Create** to save the information in the fields and create the connection string. The name of the data source is added to the **Data Sources** list on the left, and the connection string is displayed in the **Connection String** section.



12. Select **File | Save** to save the .config file.
13. Select **File | Close** to exit the connection strings dialog box.

Modifying a Connection String

If you have already created a connection string in the .config file, you can use the Web Application Management Console to make changes to the data source connection information in the connection string.

To modify a connection string:

1. In the Web Application Management Console, open the Application Server web.config file by clicking **Open Web Application** and selecting the Application Server from the list of web applications.

Note: Opening the Application Server web.config file is required to access the connection strings configuration utility, even if you are not configuring the Application Server.

2. Select **Connection Strings | View Contexts**. The connection strings dialog box is displayed.

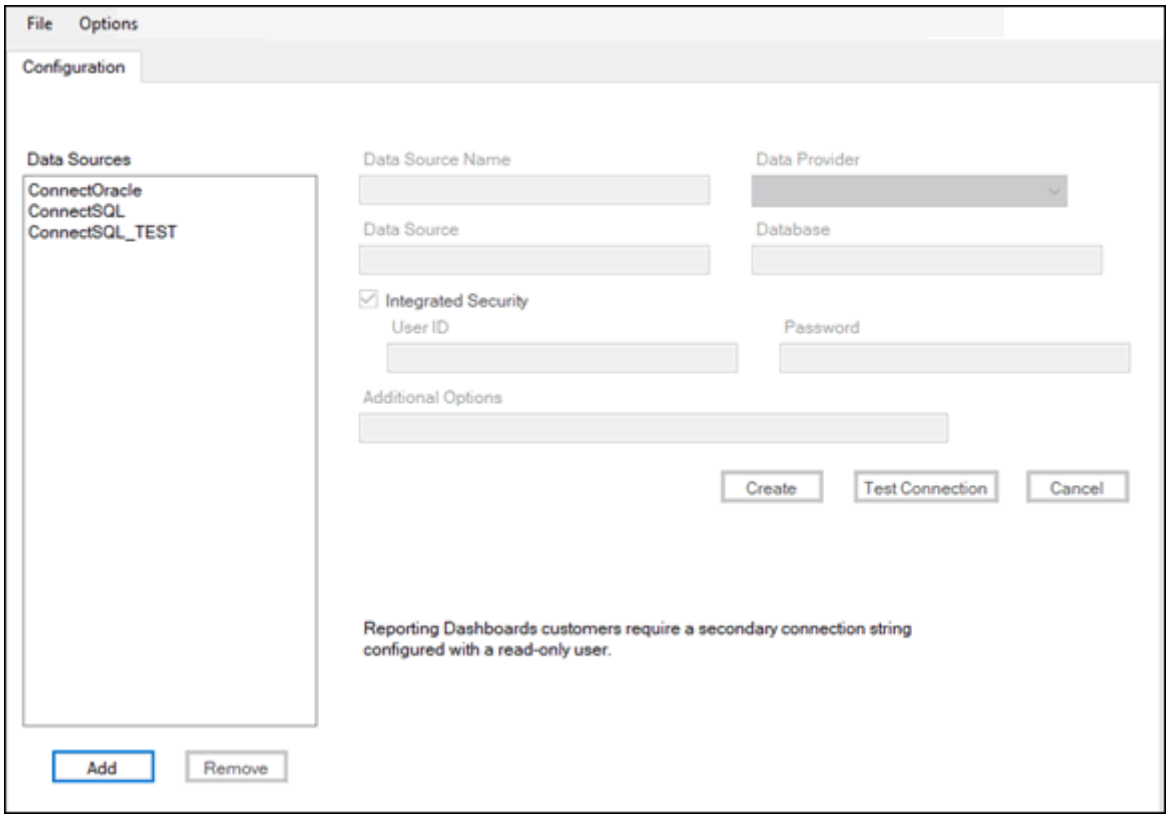
   If you are configuring an application or service other than the Application Server, follow these additional steps to open the appropriate .config file:

   a. Select **File | Configuration Path**.

   b. Browse to open the .config file for the application or service.

Note: You can also apply the **-CONFIGPATH** command line switch to the Web Application Management Console shortcut to directly open a .config file in the connection strings dialog box. See the command line switches section of the **Web Application Management Console** documentation for more information.

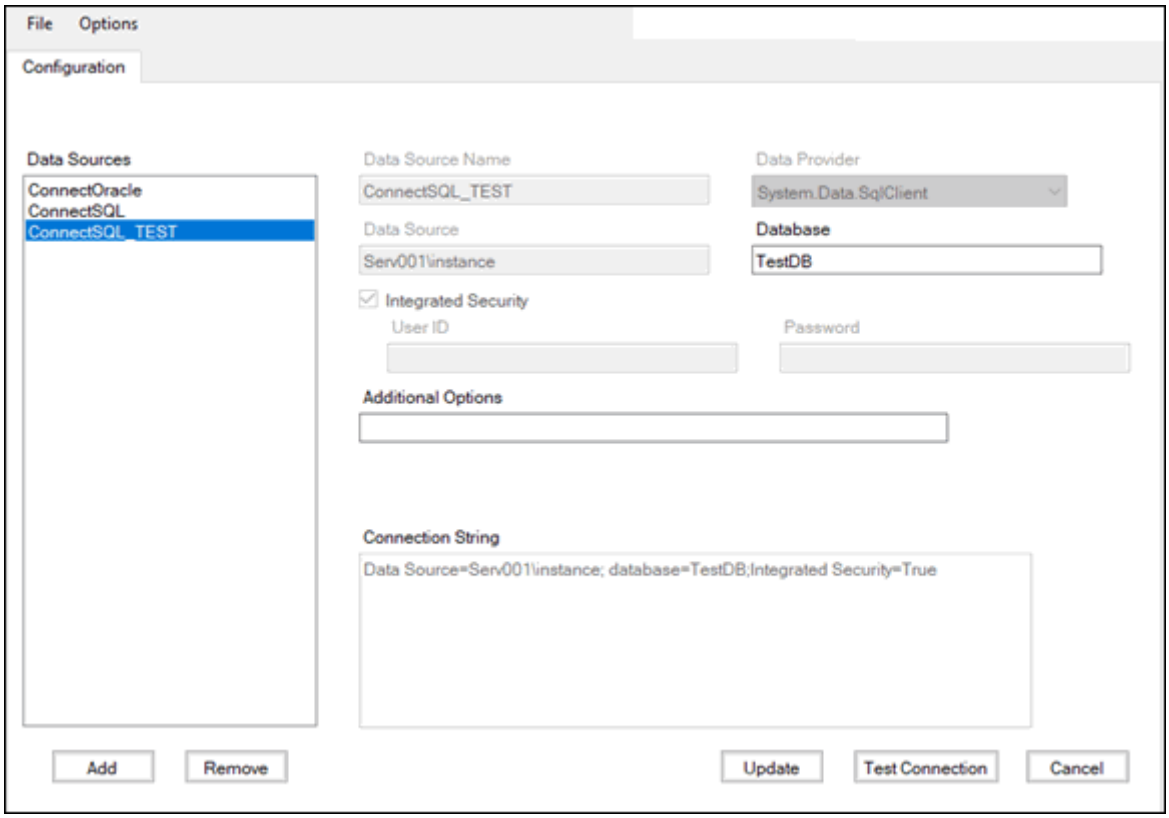
The connection strings dialog box allows you to configure connection strings.



3. To encrypt all connection strings configured in the application's .config file, ensure the **Options | Encrypt Connection Strings** menu option is selected. This option is automatically selected by default every time you open the connection string dialog box, and the connection strings are encrypted when the .config file is saved.

Caution: It is strongly recommended to encrypt the connection strings. If they are not encrypted, all data source connection information is visible in the .config file and could expose sensitive data, including any entered database user names and passwords.

4. Select the item you want to modify in the **Data Sources** list. The configured connection string information for that data source is displayed in the fields on the right.



5. Modify the connection string fields and options as needed.
6. Click **Test Connection** to test whether the entered information forms a valid connection string.
7. Click **Update** to save the changes to the connection string.
8. Select **File | Save** to save the .config file.
9. Select **File | Close** to exit the connection strings dialog box.

Deleting a Connection String

You can use Web Application Management Console to delete a data source connection string from the .config file.

To delete a connection string:

1. In the Web Application Management Console, open the Application Server web.config file by clicking **Open Web Application** and selecting the Application Server from the list of web applications.

Note: Opening the Application Server web.config file is required to access the connection strings configuration utility, even if you are not configuring the Application Server.

2. Select **Connection Strings | View Contexts**. The connection strings dialog box is displayed.

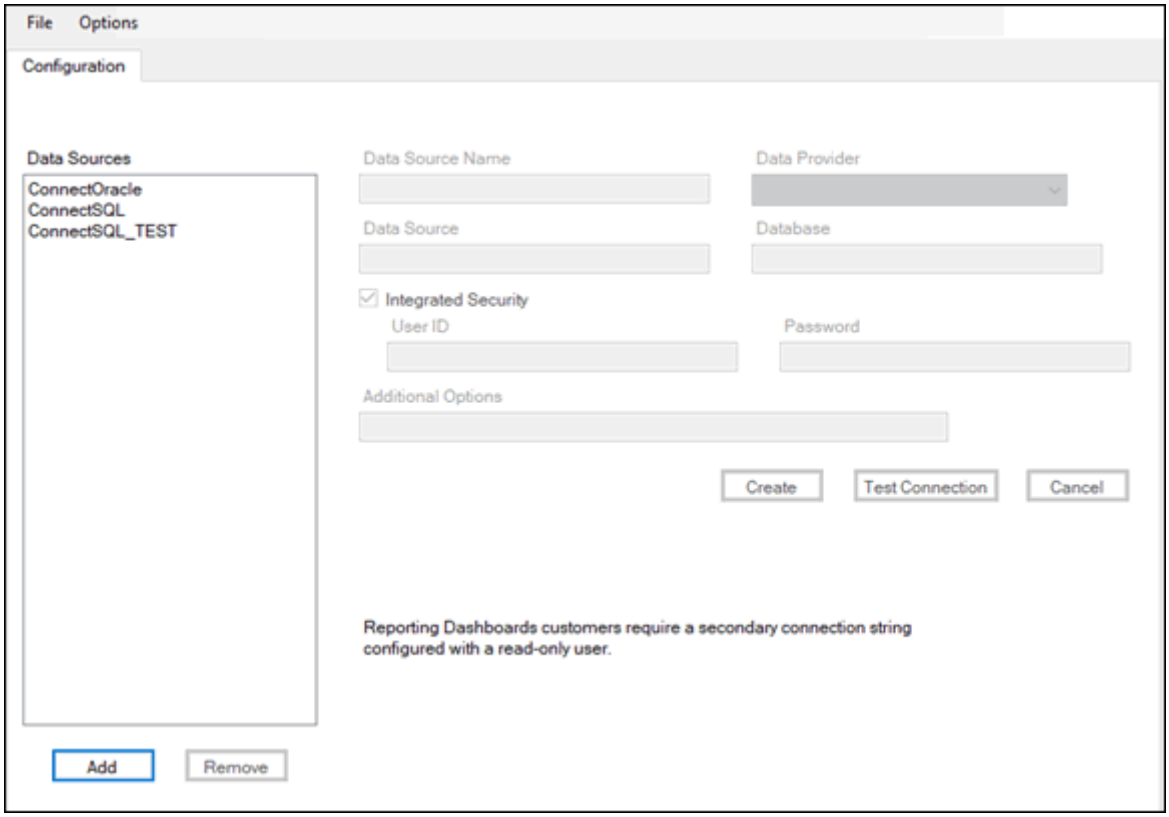
   If you are configuring an application or service other than the Application Server, follow these additional steps to open the appropriate .config file:

   a. Select **File | Configuration Path**.

   b. Browse to open the .config file for the application or service.

Note: You can also apply the **-CONFIGPATH** command line switch to the Web Application Management Console shortcut to directly open a .config file in the connection strings dialog box. See the command line switches section of the **Web Application Management Console** documentation for more information.

The connection strings dialog box allows you to remove connection strings.



3. Select the item you want to delete from the **Data Sources** list.
4. Click **Remove**. The data source is removed from the list.
5. Select **File | Save** to save the .config file.
6. Select **File | Close** to exit the connection strings dialog box.

Application Server Web.config Settings

In the Application Server Web.config file, the following setting is specific to the Data Capture Server. For descriptions of other Web.config settings, see the **Application Server** module reference guide.

DataCaptureServerWCFEndpointAddress

This setting specifies the name of the workstation or IP address where the Data Capture Server is installed and running. By default, this setting's value specifies the **localhost** of the machine on which the Application Server is installed (e.g., **net.tcp://localhost:9050/Hyland.DataCapture.ServiceManager/service**).

If the Data Capture Server is installed on a different machine than the Application Server, however, the value of the **localhost** must be changed to the name of the workstation or IP address where the Data Capture Server is installed and running (e.g., **net.tcp://172.12.256.1:9050/Hyland.DataCapture.ServiceManager/service**).

OnBase®
Foundation EP5

Intelligent Capture for AP

Administration Guide

Foundation EP5

Configuration Overview

The following steps are necessary for configuring Intelligent Capture for AP:

1. Configure scan queues for ICAP processing. See Scan Queue Configuration on page 80 for more information.
2. Grant administrators rights to the Data Capture Configuration Tool. See Granting User Groups Rights to the Data Capture Configuration Tool on page 91 for more information.
3. Upload data from an ERP system into OnBase and configure this data for use in your Intelligent Capture for AP system. See Configuring the Intelligent Capture for AP Engine on page 92 for more information.

Note: When you are licensed for Intelligent Capture for AP, you must fully configure a scan queue for ICAP processing in both the OnBase Configuration module and the Data Capture Configuration Tool (as outlined in the steps above) before you can start the Data Capture Server Windows Service.

The following steps are optional for configuring Intelligent Capture for AP:

- Configure OCR formats. See OCR and Document Type Configuration on page 79 for more information.
- Configure Keyword Types for additional verification measures. See Keyword Type Configuration on page 88 for more information.
- Grant User Groups rights to train the Intelligent Capture for AP engine to identify where AP data can be found on invoices. See Granting User Groups Rights to Training on page 91 for more information.

Note: Whenever you change how your Intelligent Capture for AP solution is configured (i.e., in either OnBase Configuration or the Data Capture Configuration Tool), you must restart the Data Capture Server Windows Service in order for the configuration changes to take effect. To restart the Data Capture Server Windows Service, use the Windows Administrative Tools (see the Windows help files for details).

OCR and Document Type Configuration

Prior to configuring Intelligent Capture for AP, if desired, you can create a custom OCR format, assign the OCR format to a Document Type, and assign the Document Type as the default Document Type for a scan queue that will undergo ICAP processing.

If you do not want to configure a custom OCR format for your solution, the **<Default>** OCR format will be used for ICAP processing. Ensure that you configure the **<Default>** OCR format's settings appropriately for your needs.

Note: Intelligent Capture for AP is capable of processing any combination of the languages listed on the **Language Selection** screen of the Data Capture Configuration Tool. In order for Intelligent Capture for AP to identify and process multiple languages, the OCR format used for ICAP processing must be configured to recognize those languages. See Mapping AP Data Types on page 101 for more information on the languages supported by Intelligent Capture for AP.

Tip: When configuring either a custom OCR format or the **<Default>** OCR format, set the **Recognizer** setting to **Most accurate**. This ensures that accuracy is given precedence over processing speed.

For more information on configuring an OCR format, see the **Full-Page OCR** module reference guide or help files.

Scan Queue Configuration

The following information explains how to configure scan queues for Intelligent Capture for AP.

Note: The following information is specific to Intelligent Capture for AP and is not intended to be a comprehensive guide for configuring scan queues. For complete information on configuring scan queues, see the **Document Imaging** module reference guide.

Routing Batches to the ICAP Processing Queue

In order for batches of unindexed documents to undergo Intelligent Capture for AP, the scan queue associated with the batches must be configured to route batches to the batch status queue for Intelligent Capture for AP processing. Depending on your configuration, this status queue may be named **Awaiting Intelligent Capture for AP**, or it may have a name customized for your solution.

The Intelligent Capture for AP processing batch status queue is routinely polled by the Data Capture Server Windows Service. When the service encounters a batch in the Intelligent Capture for AP processing batch status queue, it automatically processes the batch with no user intervention.

After the batch is processed, it is routed to the next configured batch status queue or to the batch status queue configured for index verification. Depending on your configuration, this status queue may be named **Index in Progress**, or it may have a name customized for your solution.

The method used to configure a scan queue to route batches to the ICAP processing batch status queue depends on whether the scan queue uses a standard capture process or the Capture Process Designer.

- To configure a scan queue for a standard capture process, see Scan Queue Configuration for a Standard Capture Process on page 81.
- To configure a scan queue using the Capture Process Designer, see Scan Queue Configuration for a Custom Capture Process on page 83.

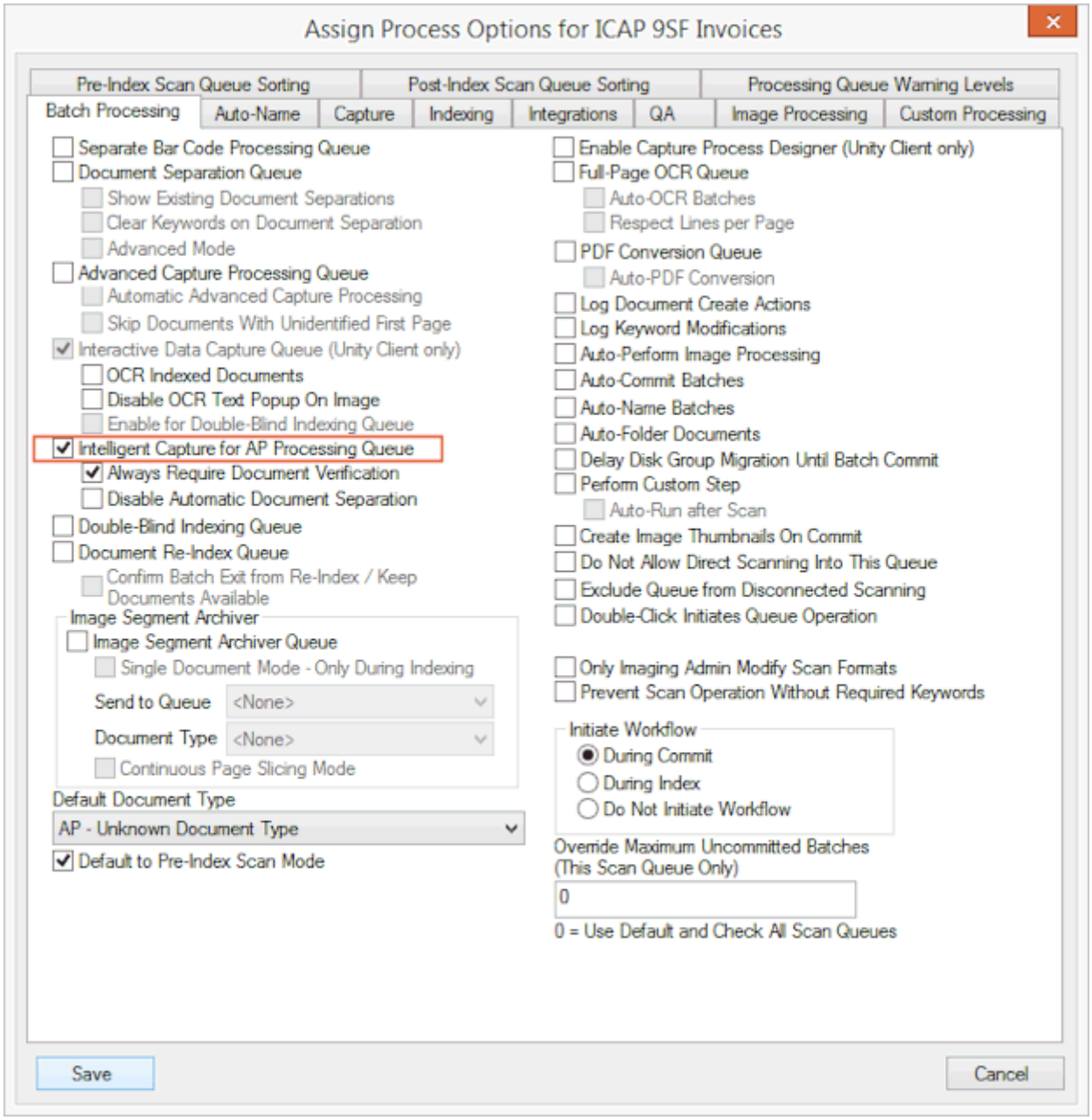
Scan Queue Configuration for a Standard Capture Process

For a scan queue using a standard capture process, configuration of the scan queue for Intelligent Capture for AP is performed in the OnBase Configuration module. This method is only used for scan queues using the standard capture process.

To configure a scan queue to route batches to undergo ICAP processing (i.e., to route batches to the **Awaiting ICAP Processing** batch status queue):

1. In the OnBase Configuration module, click **Import | Scan Queues**. The **Scan Queue Configuration** dialog box is displayed.
2. Select the scan queue that is to be configured to route batches to undergo ICAP processing and click **Process Options**. The **Assign Process Options for <Scan Queue Name>** dialog box is displayed.

3. From the Batch Processing tab, select **Intelligent Capture for AP Processing Queue**.



Once the **Intelligent Capture for AP Processing Queue** option is selected, the **Interactive Data Capture Queue (Unity Client only)** option is automatically selected and disabled. Also, new sub-options specific to Intelligent Capture for AP are enabled.

4. If you want to automatically route batches that have been processed to the indexing batch status queue for index verification, regardless of whether any Document Types or Keyword Values have been marked as suspect, select **Always Require Document Verification**.

Tip: If your solution will use the Intelligent Capture for AP engine's Document Type classification methods, it is recommended that you select **Always Require Document Verification**. This ensures that users will have the opportunity to review the Document Types assigned by the engine.

5. If you want to prevent the Intelligent Capture for AP engine from automatically performing document separation for single- and multi-page invoices, select **Disable Automatic Document Separation**.

Tip: Because the Intelligent Capture for AP engine cannot separate PDF documents, it is recommended that you select **Disable Automatic Document Separation** if your solution processes PDF documents.

6. When you are finished configuring the scan queue, click **Save**.

Scan Queue Configuration for a Custom Capture Process

For a scan queue using a custom capture process, most of the configuration of the scan queue for Intelligent Capture for AP takes place in OnBase Studio using the Capture Process Designer. However, you must first create the scan queue itself. You can create the scan queue in OnBase Studio or in the OnBase Configuration module. For complete information on configuring scan queues, see the **Document Imaging** module reference guide.

If you use the OnBase Configuration module to create the scan queue, you must enable the scan queue to use the Capture Process Designer. After you have created the scan queue, you must use OnBase Studio to create and configure a custom capture process that includes Intelligent Capture for AP.

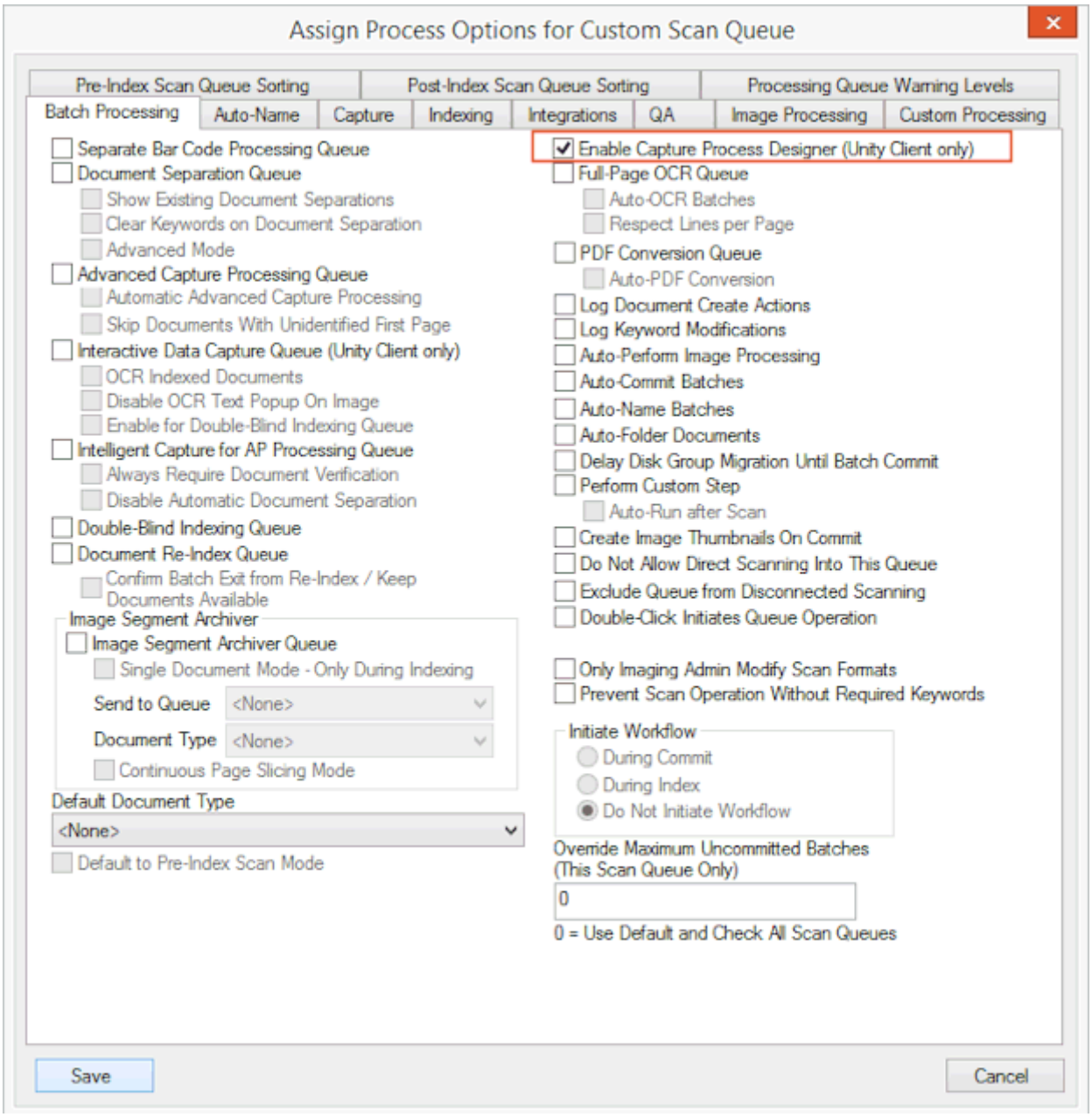
For more information on custom capture processes and the Capture Process Designer, see the **Document Imaging** documentation.

Enabling a Scan Queue to Use the Capture Process Designer

Custom capture processes can be created and configured for scan queues created in the OnBase Configuration module. Before you can create and configure a custom capture process for a scan queue created in the OnBase Configuration module, the scan queue must be enabled in OnBase Configuration to use the Capture Process Designer.

To enable a scan queue to use the Capture Process Designer:

1. In the OnBase Configuration module, click **Import | Scan Queues**. The **Scan Queue Configuration** dialog box is displayed.
2. Select the scan queue that you want to configure for Intelligent Capture for AP and click **Process Options**. The **Assign Process Options for <Scan Queue Name>** dialog box is displayed.



3. From the Batch Processing tab, select **Enable Capture Process Designer (Unity Client only)**.

   A warning message is displayed, informing you that enabling a scan queue to use Capture Process Designer makes the user-interactive processes for that scan queue only available in the Unity Client.
4. Click **Yes** to confirm.
5. Click **Save** in the **Assign Process Options for <Scan Queue Name>** dialog box.

Configuring Intelligent Capture for AP in a Custom Capture Process

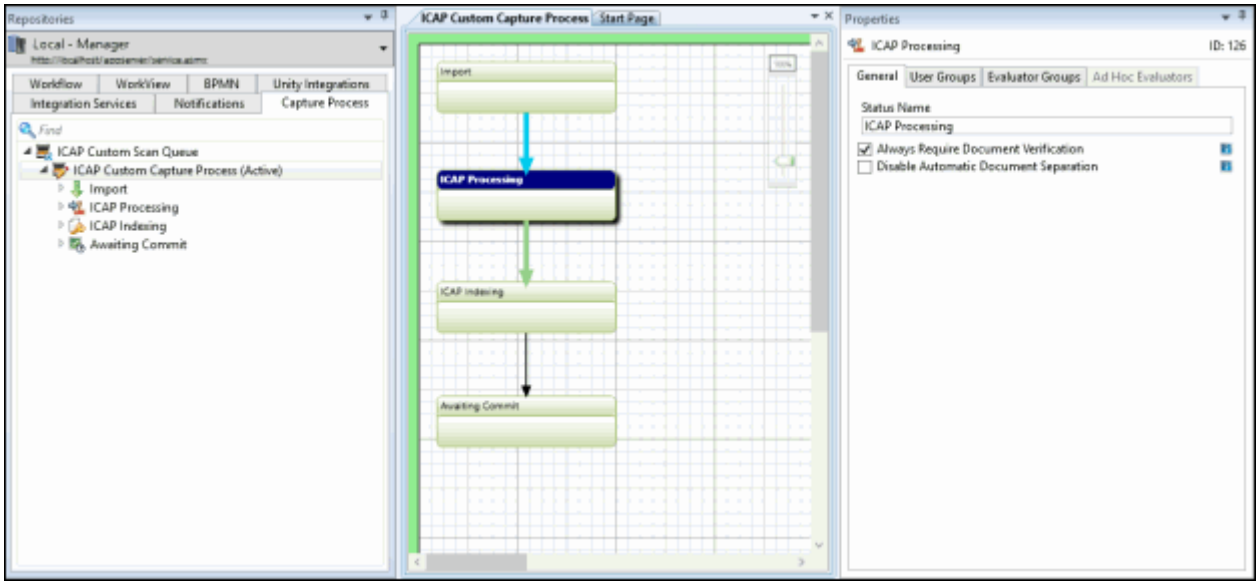
Once a scan queue has been enabled for custom capture processes, you can configure the custom capture process in OnBase Studio. The capture process must include a status step for **ICAP Processing** and its related configuration settings.

To configure a custom capture process to perform ICAP processing and index verification:

1. In OnBase Studio, select the **Capture Process** tab in the **Repositories** pane. This tab lists the scan queues enabled for custom capture processes.
2. Within the **Capture Process** tab, open the scan queue and capture process to be used for ICAP processing. The capture process is displayed in the design view pane.
3. Drag the **ICAP Processing** status step from the **Toolbox** pane to the design view pane.

Note: The **ICAP Indexing** status step is automatically added to the design view pane when the **ICAP Processing** status step is dragged from the **Toolbox** pane to the design view pane.

4. Select the **Evaluator** that will connect the **ICAP Processing** status step to the **ICAP Indexing** status step.
5. The **ICAP Processing** status step and the **ICAP Indexing** step are displayed in the design view pane. The focus is set to the **ICAP Processing** status step, and the sub-options for **ICAP Processing** are displayed on the **General** tab in the **Properties** pane.



6. If you want to automatically mark documents for index verification to be performed in the next configured **Index** status step, regardless of whether any Keyword Values have been marked as suspect during ICAP processing, select the **Always Require Document Verification** sub-option.

Tip: If your solution will use the Intelligent Capture for AP engine's Document Type classification methods, it is recommended that you select **Always Require Document Verification**. This ensures that users will have the opportunity to review the Document Types assigned by the engine.

7. If you want to prevent the Intelligent Capture for AP engine from automatically performing document separation for single- and multi-page invoices, select the **Disable Automatic Document Separation** sub-option.

Tip: Because the Intelligent Capture for AP engine cannot separate PDF documents, it is recommended that you select **Disable Automatic Document Separation** if your solution processes PDF documents.

8. In the capture process design view, select the **ICAP Indexing** status step configured for performing Intelligent Capture for AP index verification. The indexing process options are displayed in the **General** tab of the **Properties** pane.
9. Select **ICAP Indexing** in the **ICAP Processing** section. This option enables ICAP verification during indexing.
10. Select **Interactive Data Capture** in the **Interactive Data Capture** section. This option enables the Interactive Data Capture methods that are used to train the ICAP engine.
11. Use the **Evaluator** connectors to integrate the **ICAP Processing** status step into the capture process.
12. Complete the rest of the capture process by adding and configuring any other status steps and evaluators as needed for your solution.
13. When you are finished configuring the capture process, save the changes and publish the capture process.

Navigating Only Between Suspect Keyword Values

By default, if a user presses the **Tab** key when performing index verification, the next Keyword Value, regardless of whether or not it is suspect, is selected in the **Indexing** dialog box.

If desired, you can configure the **Indexing** dialog box to only navigate between Keyword Values that have been identified as suspect when a user presses the **Tab** key (i.e., when a user presses the **Tab** key, the next suspect Keyword Value is selected; all non-suspect Keyword Values between the last-selected Keyword Value and the newly-selected Suspect Keyword Value are skipped). This function is enabled with the **TAB Cycles Through Suspect Keywords** indexing option.

Additionally, if a user is using Interactive Data Capture's Point and Click or Swiping indexing methods, enabling this option allows the user to navigate to the next suspect Keyword Value by clicking the highlighted text in the binding box on the image.

To enable this option for a scan queue using a standard capture process:

1. From the OnBase Configuration module, click **Import** | **Scan Queues**. The **Scan Queue Configuration** dialog box is displayed.
2. Select the scan queue to be modified from the Queue Name list and click **Process Options**. The **Assign Process Options for <Scan Queue Name>** dialog box is displayed.
3. Select the **Indexing** tab.
4. Select the **TAB Cycles Through Suspect Keywords** check box.
5. Click **Save**.

To enable this option for a scan queue using a custom capture process:

1. From OnBase Studio, select the **Capture Process** tab in the **Repositories** pane.
2. Within the **Capture Process** tab, open the scan queue and capture process to be used for Intelligent Capture for AP processing.
3. In the design view pane, select the Index status step configured for performing Intelligent Capture for AP index verification. The indexing process options are displayed in the **General** tab of the **Properties** pane.
4. Select the **TAB Cycles Through Suspect Keywords** check box in the **Indexing Focus** section of the indexing process options.
5. Click **Save** on the **Home** ribbon.

When the **TAB Cycles Through Suspect Keywords** option is selected, a user may navigate between all Keyword Values in the **Indexing** dialog box (suspect or non-suspect) by pressing the **Up Arrow** or **Down Arrow** keys.

Note: If the **TAB Cycles Through Suspect Keywords** check box is checked, and if the **Tab to Next Field** radio button is selected in either the Main Enter Key or the Numeric Enter Key section, then pressing the **Enter** key will select the next suspect Keyword Value in the **Indexing** dialog box (i.e., non-suspect Keyword Values are skipped).

Assigning Document Types to Scan Queues

Each Document Type used for Intelligent Capture for AP must be assigned to a scan queue configured to route batches to the ICAP processing batch status queue.

In addition, the following primary AP Document Types must be configured in separate scan queues:

- Invoices
- Purchase Orders
- Packing Slips
- Bills of Lading

PO invoices and Non-PO invoices can be configured in the same scan queue for invoices, and the ICAP engine's Document Type classification methods can be used to automatically determine and assign the Document Types of imported documents. However, if users are going to assign Document Types manually, it is considered a best practice to create separate scan queues for PO invoices and Non-PO invoices.

The following secondary AP Document Types can be configured in a scan queue with any other AP Document Type:

- AP Miscellaneous
- AP Support
- AP Unknown

For more information on the functions of primary and secondary AP Document Types, see Primary and Secondary AP Document Types on page 160.

For information on how to assign Document Types to scan queues, see the **Document Imaging** module reference guide.

Keyword Type Configuration

Keyword Types can be configured to provide additional layers of verification to ICAP processing. Also, certain Keyword Types can be configured to improve the accuracy and efficiency with which Intelligent Capture for AP processes batches of documents from international locales.

For more information on how to configure Keyword Types for Intelligent Capture for AP, see the following subsections. For general information on configuring Keyword Types, see the **System Administration** module reference guide or help file.

Configuring Keyword Types for Additional Verification

To add additional layers of verification to ICAP processing, you can configure individual Keyword Types to require a value for archival so that a blank value would cause the batch to be routed for index verification, or even to require a specific value from a Data Set so that an invalid value would cause the batch to be routed for index verification.

For information on how to configure Keyword Types to require such values for verification, see the following subsections. For general information on configuring Keyword Types, see the **System Administration** module reference guide or help file.

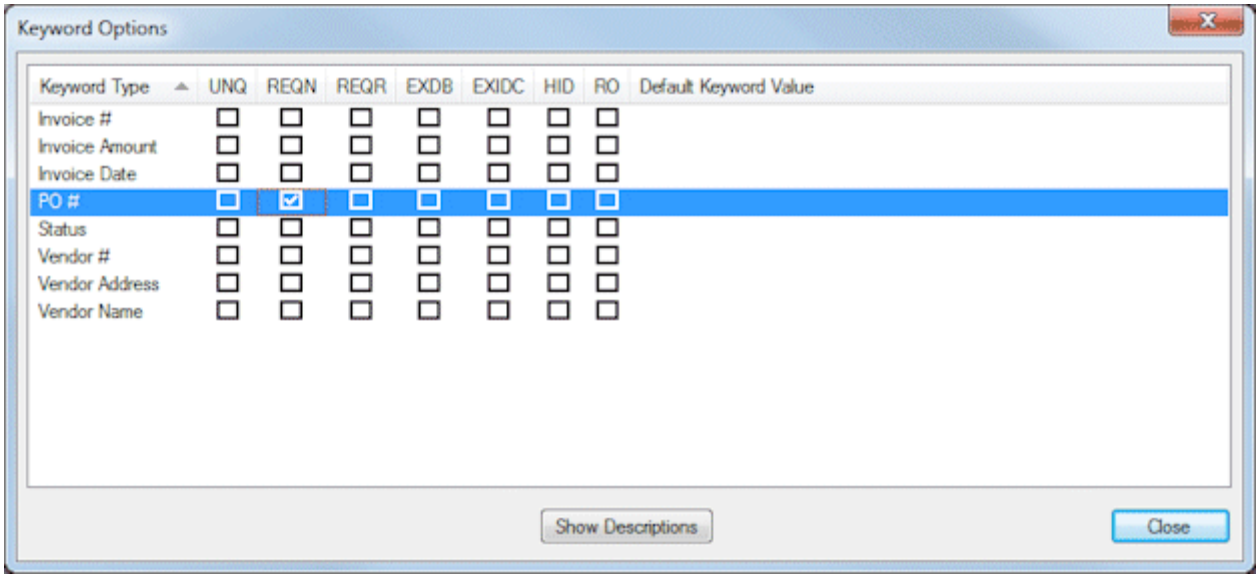
Requiring Keyword Values for Archival

To ensure that batches are routed to the indexing batch status queue for index verification when ICAP processing fails to extract a value for a certain Keyword Type, you can configure the Keyword Type to require a value for archival purposes.

To configure a Keyword Type to require a value for archival:

1. From the OnBase Configuration module, click **Document | Document Types**. The **Document Types** dialog box is displayed.
2. From the **Document Type** list, select the Document Type for which the target Keyword Type must have a value.
3. Click **Keyword Types**. The **Keyword Type Assignment** dialog box is displayed.
4. Click **Options**. The **Keyword Options** dialog box is displayed.

5. In the **REQN** column, select the check box for each Keyword Type for which you want to require a value to be present.



6. Click **Close** to return to the **Keyword Type Assignment** dialog box.
7. If you want to configure Keyword Types to require a value when they belong to additional Document Types, repeat steps 2 to 6.
8. To save your configuration changes, click **Save**. You are returned to the **Document Types** dialog box.
9. When finished configuring Keyword Types to require a value for archival, click **Close**.

Requiring Keyword Values to Match Data Set Values

To ensure that batches are routed to the indexing batch status queue for index verification when ICAP processing fails to extract a value that matches one of the specified Data Set values for a certain Keyword Type, you can configure the Keyword Type to reject any value that does not match one of these Data Set values.

To configure a Keyword Type to require a value from the specified Data Set:

1. From the OnBase Configuration module, click **Keyword | Keyword Types**. The **Keyword Type Configuration** dialog box is displayed.
2. From the **Defined Keyword Types** list, select the Keyword Type for which you want to require a Data Set value.
3. Click **Settings**. The **Keyword Type Settings** dialog box is displayed.
4. In the **Data Sets / Drop Down Lists** section, ensure that **Use Keyword Data Set** is selected.
5. In the **Usage Restrictions** section, select **Keyword Must Exist**.
6. Click **Save** to save your changes and return to the **Keyword Type Configuration** dialog box.

7. If you want to confirm your Data Set values for the Keyword Type, or if you need to configure them for the first time, do the following:
   a. With the desired Keyword Type selected, click **Data Set**. The **Keyword Data Set Configuration** dialog box is displayed.
   b. Confirm the values in the **Keyword Data Set** list. If necessary, create and configure new values. For more information on configuring Keyword Type Data Sets, see the **System Administration** module reference guide or help file.
8. If you want to configure additional Keyword Types to require a value from a specified Data Set, repeat steps 2 to 7.
9. When finished configuring Keyword Types to require a value from a specified Data Set, click **Close**.

Configuring Keyword Types for International ICAP Processing

Intelligent Capture for AP is capable of processing batches of documents from international locales. In addition to identifying and processing content in multiple languages, Intelligent Capture for AP can also identify and process multiple currency and date formats.

If you want Intelligent Capture for AP to process multiple currency and date formats, a Keyword Type corresponding to the **Culture Locale** capture data type must be configured.

If you have configured a Keyword Type that corresponds to the **Culture Locale** capture data type, you can also configure Keyword Types that correspond to the **Currency Code** and **Currency Symbol** capture data types. Doing so will improve the accuracy and efficiency of ICAP processing.

Note: Interactive Data Capture indexing features should be disabled for the Keyword Types that correspond to the **Culture Locale**, **Currency Code**, and **Currency Symbol** capture data types.

A Data Set must be associated with each of the above Keyword Types. These Data Sets are available from your OnBase solution provider. See the System Administration manual or help files for more information regarding Keyword Type Data Set Configuration.

If you want to increase the accuracy of locale selection during ICAP processing, configure Keyword Types that correspond to the **Provider Value-Added Tax Identification Number** and **Customer Value-Added Tax Identification Number** capture data types.

You should use the table below as a guide when configuring Keyword Types for international ICAP processing.

Keyword Type Name	Data Type	Maximum Length
Culture Locale	Alphanumeric	15
Currency Code	Alphanumeric	3

Keyword Type Name	Data Type	Maximum Length
Currency Symbol	Alphanumeric	5
Provider Value-Added Tax Identification Number	Alphanumeric	25
Customer Value-Added Tax Identification Number	Alphanumeric	25

User Group Configuration

Granting User Groups Rights to Training

In order to train the Intelligent Capture for AP engine to identify where AP data can be found on documents, a user must belong to a User Group with the **Intelligent Capture AP Verification** Privilege.

To grant a User Group this privilege:

1. From the OnBase Configuration module, click **Users** | **User Groups/Rights**. The **User Groups & Rights** dialog box is displayed.
2. From the **User Group Name** list, select the appropriate User Group and click **Privileges**. The **Assigning User Group Privileges for <User Group Name> Group** dialog box is displayed.
3. In the Client Based Products section, select **Intelligent Capture AP Verification**.

Note: If the **Intelligent Capture AP Verification** Privilege is selected, the **Interactive Data Capture** Privilege is automatically selected and disabled (i.e., it cannot be deselected while the first privilege is selected). This is because the **Interactive Data Capture** Privilege is required for the **Intelligent Capture AP Verification** Privilege to function. For more information on the **Interactive Data Capture** Privilege and the features it unlocks, see the **Interactive Data Capture** module reference guide.

4. Click **Save**.

Granting User Groups Rights to the Data Capture Configuration Tool

In order to access the Data Capture Configuration Tool, an administrator must belong to a User Group with both the **Advanced/Intelligent Capture** Registered Processing Product and the **Document Imaging** Administrative Processing Privilege Product Right.

To grant an administrator the necessary User Group rights to access the Data Capture Configuration Tool:

1. From the OnBase Configuration module, click **Users | User Groups/Rights**. The **User Groups & Rights** dialog box is displayed.
2. From the User Group Name list, select the appropriate administrator User Group and click **Product Rights**. The **Assigning Product Rights for <User Group Name> Group** dialog box is displayed.
3. In the Registered Processing Products section, select **Advanced/Intelligent Capture**.
4. In the Administrative Processing Privileges section, select **Document Imaging**.
5. Click **Save**.

Configuring the Intelligent Capture for AP Engine

With the Data Capture Configuration Tool, you can upload vendor data from an ERP system into OnBase and configure this data for use in your Intelligent Capture for AP solution. The data can be configured as you prepare it for upload; configure a Document Type and a primary Keyword Type for the vendor name/number, and associate the vendor name/number with uniquely identifying values that will physically appear on the documents (e.g., phone numbers, street addresses, email addresses, etc.). Then associate each identifier value with a regular expression. Optionally, you can also configure a secondary Keyword Type for the vendor name/number that complements the primary Keyword Type (e.g., If you configured a primary Keyword Type for the vendor number, you can configure a secondary Keyword Type for the vendor name, and vice versa.). Once you have finished configuring the vendor data, it can be uploaded into your OnBase system.

When vendor data is configured in this manner, the Intelligent Capture for AP engine first attempts to classify the document based on the default Document Type configured for the scan queue. If the Document Type cannot be determined at this point, the ICAP engine searches documents for the configured regular expressions. Once the regular expressions are found, the engine searches for identifier values that match the forms of these regular expressions. Then the engine determines the best layout match based on the page and sequence of the identifier values, and it assigns the associated Document Type and, if valid, the primary Keyword Value that is specified as the vendor name/number. Once the primary Keyword Value has been assigned, any matching secondary Keyword Value for the complementary vendor name/number is also assigned. Following this, the engine searches for any matching AutoFill Keyword Sets that have been configured for the Document Type or the Keyword Type. If a match is found, the remaining Keyword Values for the Document Type are populated and assigned Suspect Level scores of 100 so that they will not be marked suspect. If

the secondary Keyword Value for the vendor name/number is assigned a different value by the AutoFill than it was assigned as the complementary value of the primary Keyword Value for the vendor name/number, the value assigned by the AutoFill replaces the original value. If no match is found among the configured AutoFill Keyword Sets, however, the engine indexes the remaining values in the normal fashion (i.e., according to training and/or manual configuration).

Note: If an AutoFill Keyword Set match is found for an extracted **PO Number** value, depending on your configuration, this AutoFill Keyword Set is triggered to populate the vendor Keyword Values. If any conflicting values have been assigned according to the regular expression extraction method described above, the AutoFill values are given precedence and replace the extracted values that do not match.

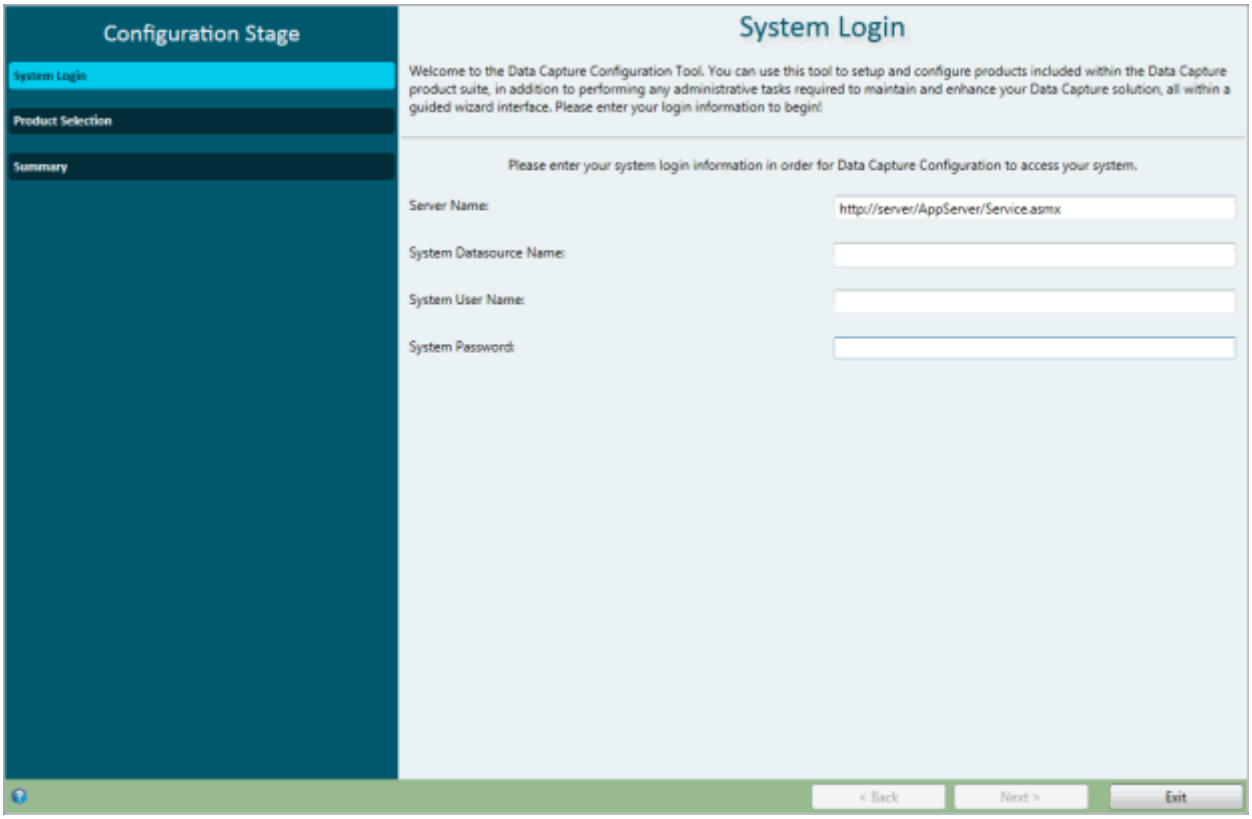
Note: Unlike the Secondary Keyword Values, the Primary Keyword Value for the AutoFill Keyword Set can be marked suspect since it was found by other (i.e., non-AutoFill) means.

As the Intelligent Capture for AP engine identifies vendor names/numbers on the documents in a batch, by default, it automatically separates the documents according to individual vendors. The engine then separates the documents belonging to each vendor according to individual PO and Non-PO invoice values. If no vendor has been identified on a page, the engine searches for an Invoice Number or a PO Number and, given sufficient Suspect Level scores, separates the page as a new document. This process allows for convenient, upfront document separation for single- and multi-page invoices.

Uploading and Configuring Vendor Data

To upload and configure vendor data:

1. Launch the Data Capture Configuration Tool. Depending on your settings during installation, the shortcut to the tool can be found in the Windows Program Menu folder and/or on the Windows desktop.
2. The **System Login** screen of the **Data Capture Configuration** window is displayed.



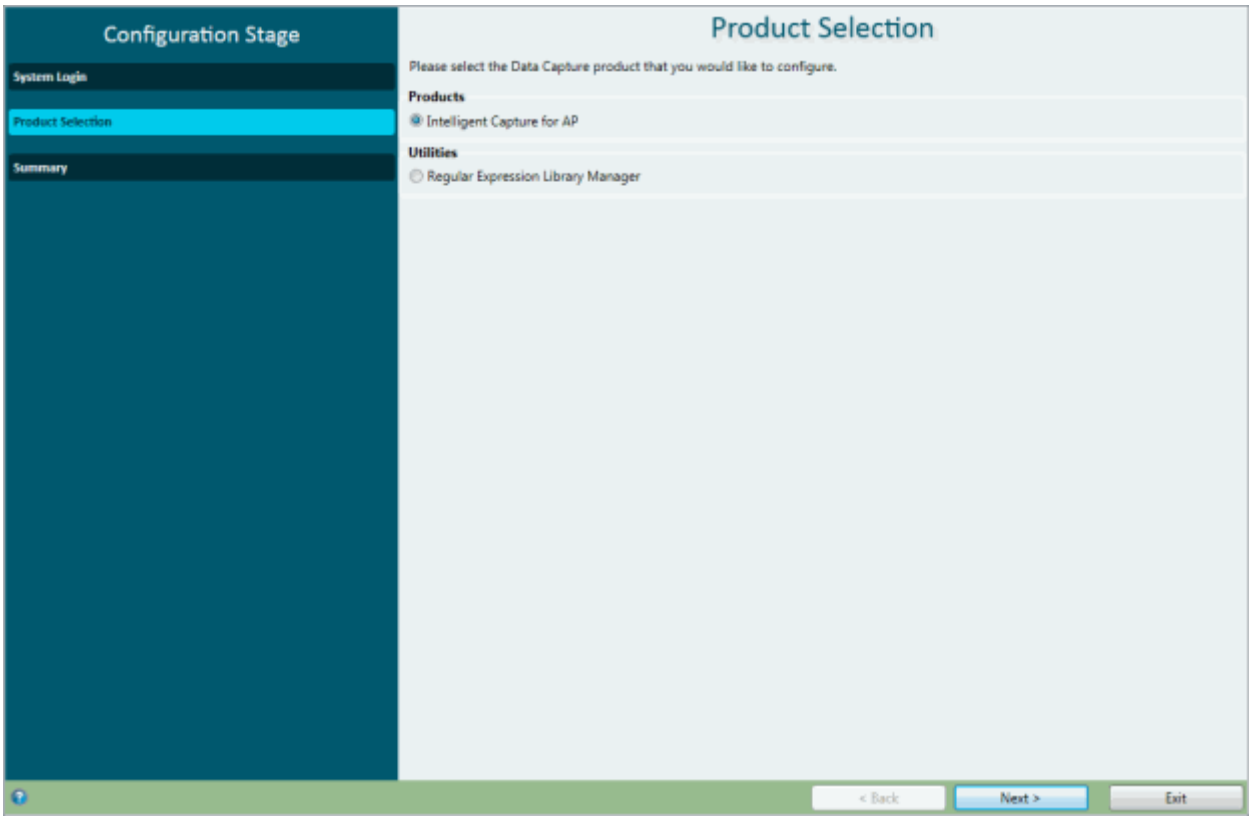
   a. Enter your logon information in the appropriate fields: the full URL to the Service page of your OnBase Application Server, the appropriate data source, and your OnBase credentials.

Note: Because the Data Capture Configuration Tool is a 32-bit application, you must enter a 32-bit data source name.

   b. When finished, click **Next >** (or press **Enter**).

Note: Depending on your account's settings, you may be prompted to change your password. For more information on password policies, see the **System Administration** module reference guide or help file.

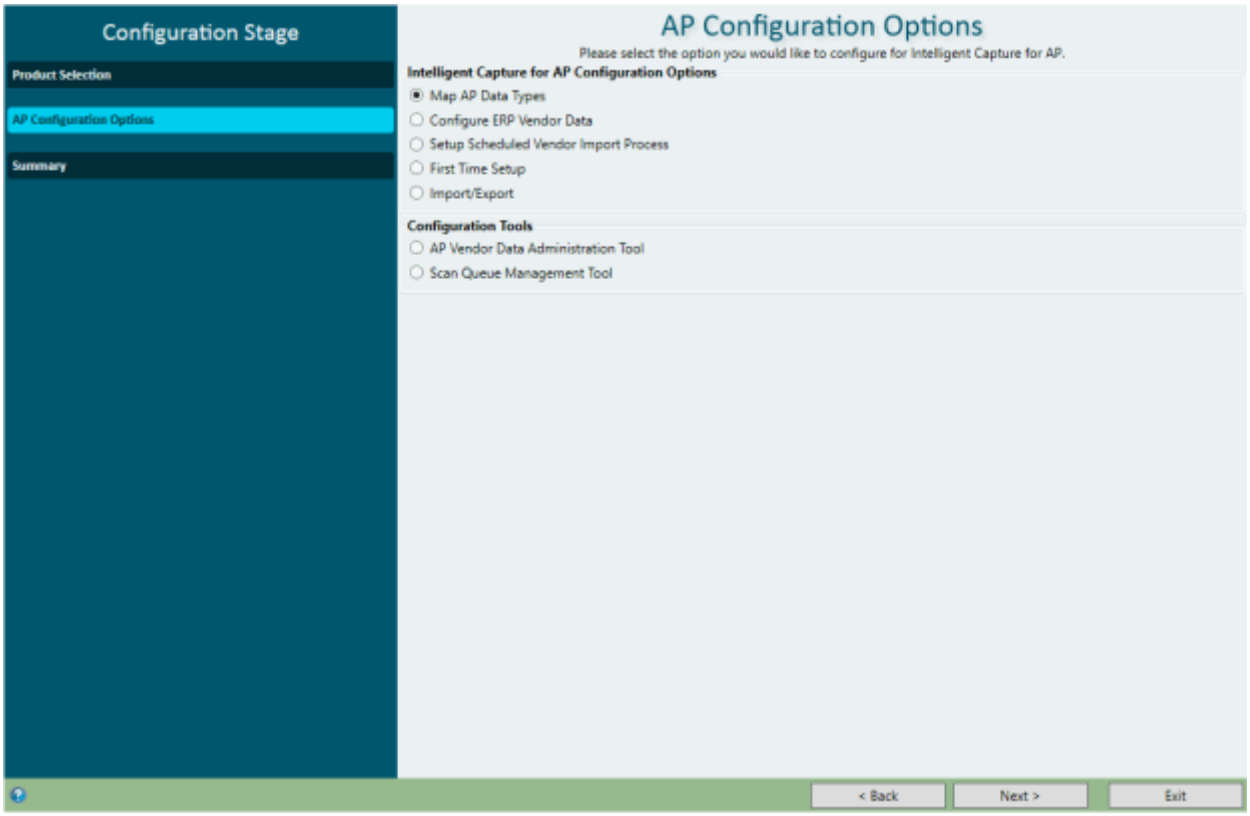
3. The **Product Selection** screen is displayed.



Do one of the following:

- To begin configuring the Intelligent Capture for AP engine, select the **Intelligent Capture for AP** product, and then click **Next >**. Proceed to the next step.
- To manage your Regular Expression Library, select the **Regular Expression Library Manager** utility, and then click **Next >**. Proceed to Managing the Regular Expression Library on page 154.

4. The **AP Configuration Options** screen is displayed.



Select a configuration option:

- If you are configuring your Intelligent Capture for AP solution for the first time, only the following options are available to you:
  - **First Time Setup:** This option guides you through the necessary configuration screens in the appropriate order to ensure that your solution is set up in a valid manner.

Note: On the **AP Configuration Options** screen, the **First Time Setup** option can be selected at any time to utilize the guided setup, even if you are not configuring your solution for the first time.

  For the configuration procedures specific to this option, see Setting Up a Solution on page 98.
  - **Import/Export:** To import/export configuration sections and/or learned data into/from your Intelligent Capture for AP system, select **Import/Export** and click **Next >**.

    For the configuration procedures specific to this option, see Importing/Exporting Vendor Data Across Different Systems on page 136.
- To map pre-configured AP Document Types and Keyword Types to OnBase Document Types and Keyword Types, select **Map AP Data Types** and click **Next >**.

  For the configuration procedures specific to this option, see Mapping AP Data Types

on page 101.

- To set up an ERP system and import vendor data from it, select **Configure ERP Vendor Data** and click **Next >**.

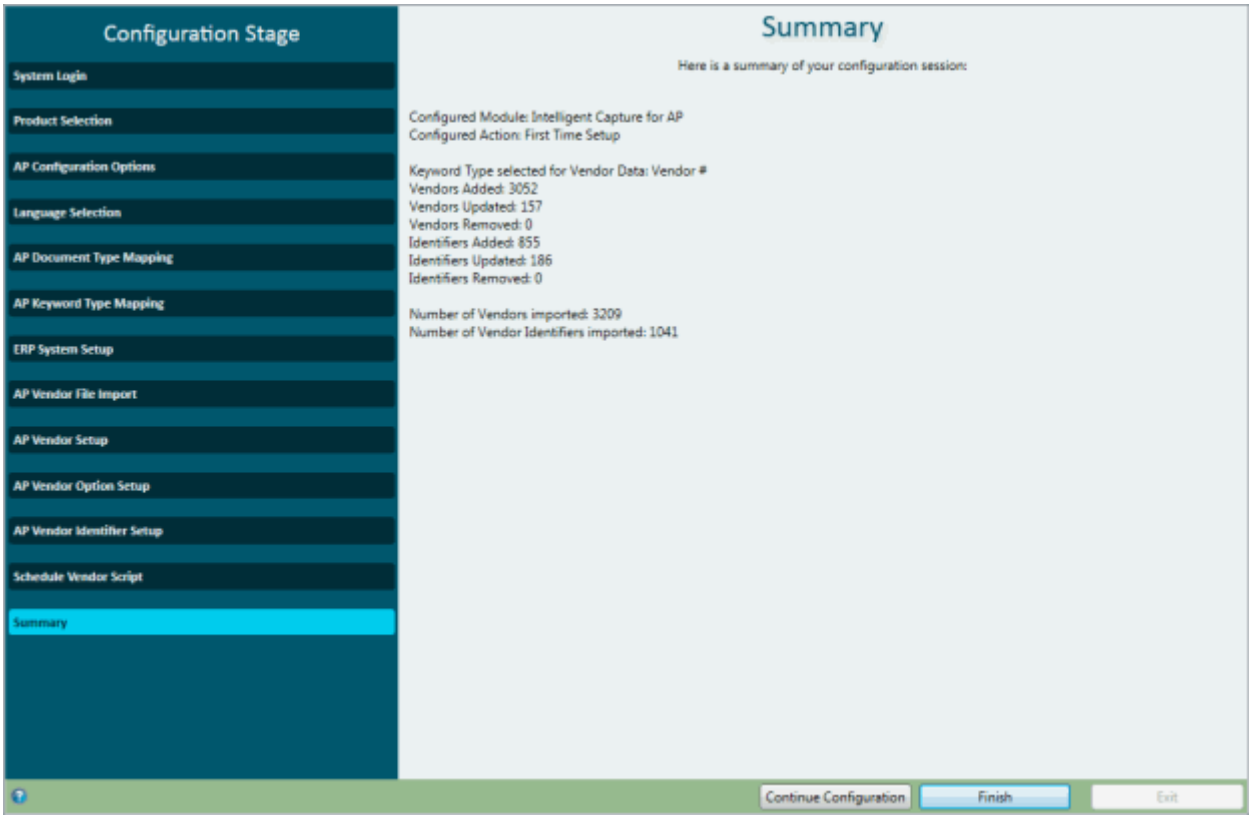
  For the configuration procedures specific to this option, see Importing Vendor Data From a File on page 109.
- To schedule processes for importing vendor data at regular intervals, select **Setup Scheduled Vendor Import Process** and click **Next >**.

  For the configuration procedures specific to this option, see Configuring a Scheduled Vendor Import Process on page 120.
- To modify/delete existing vendor data, or to add new vendor data on an individual basis, select **AP Vendor Data Administration Tool** and click **Open**.

  For the configuration procedures specific to this option, see Modifying Vendor Data on page 128.
- To modify ICAP-specific settings of an Intelligent Capture for AP scan queue, select **Scan Queue Management Tool** and click **Open**.

  For the configuration procedures specific to this option, see Managing Scan Queues on page 152.

5. Once you have finished configuring all settings applicable to the option you selected in the previous step, the **Summary** screen is displayed.



A brief summary of your configuration settings is listed. Once you are finished reviewing the summary, do one of the following:

- To save your configuration changes and return to the **Product Selection** screen, click **Continue Configuration**.
- To save your configuration changes and close the **Data Capture Configuration** window, click **Finish**.

Setting Up a Solution

Within the **Data Capture Configuration** window, once you select **First Time Setup** and proceed, you are guided in succession through each of the configuration stages outlined in the sections below. Once you complete a configuration stage, you are immediately taken to the next stage, and you are only taken to the **Summary** screen after you have completed all configuration stages.

As you proceed through your solution's first time setup, you are taken through the configuration stages in the following order. In each stage, refer to the applicable sections below for detailed procedures.

1. ERP System Setup (see Setting Up an ERP System on page 99).
2. AP Data Type Mapping (see Mapping AP Data Types on page 101).

3. AP Vendor File Import (see Importing Vendor Data From a File on page 109).
4. AP Vendor Data Import Scheduling (see Configuring a Scheduled Vendor Import Process on page 120).

Note: The AP Vendor Data Administration stage (i.e., modifying/deleting existing vendor data, or adding new vendor data on an individual basis) is not part of the first time setup configuration. For information on vendor data administration procedures, see Modifying Vendor Data on page 128.

Note: The AP Import/Export configuration stage (i.e., importing/exporting data between systems) is not part of the first time setup configuration. For information on import/export procedures, see Importing/Exporting Vendor Data Across Different Systems on page 136.

Setting Up an ERP System

If you are setting up a solution using the **First Time Setup** option, you are first prompted to create an ERP system to use in your solution.

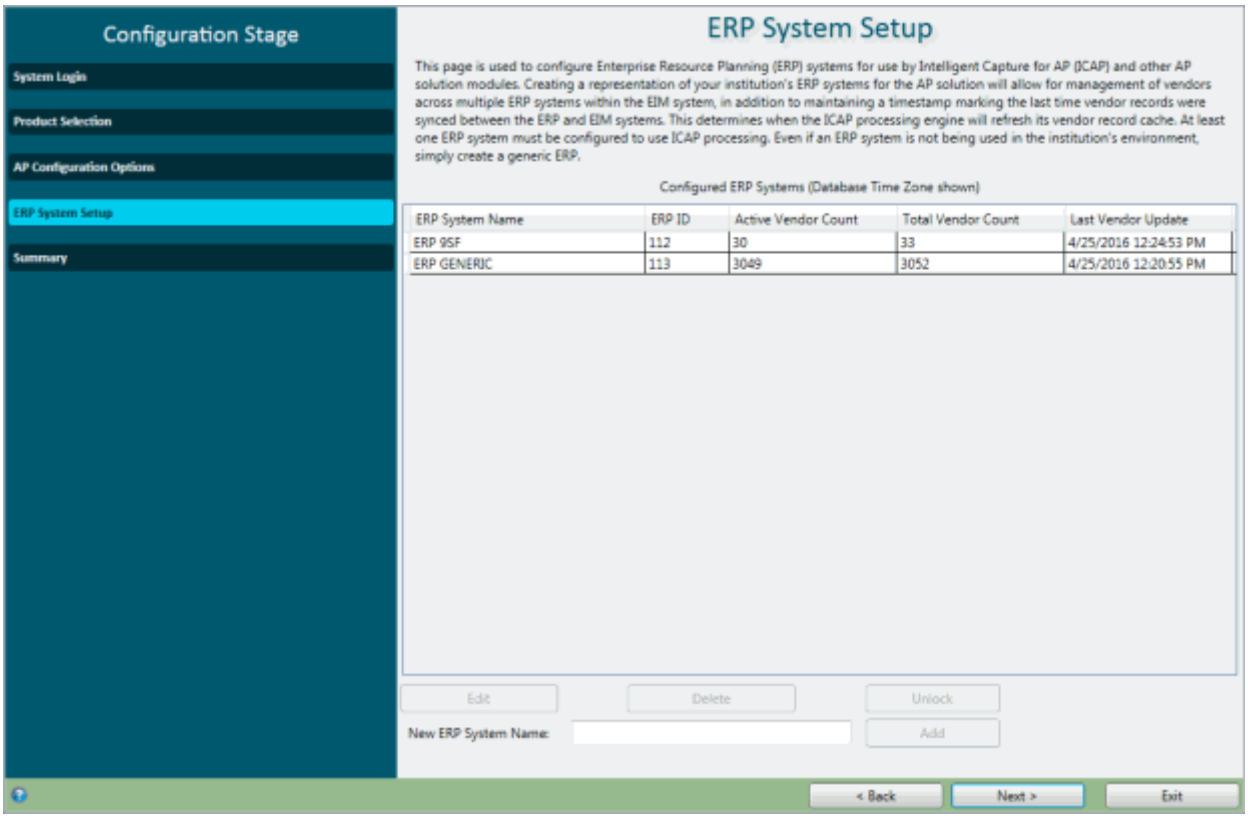
To use ICAP processing, your database must have a representation of the Enterprise Resource Planning (ERP) system from which the vendor data is derived. This feature allows you to manage vendor data from multiple ERP systems while keeping the data from each ERP system separate.

At least one ERP system record must be configured to use ICAP processing. Even if an ERP system is not being used in your environment, simply create a generic ERP system configuration record.

To set up an ERP system as part of first time setup:

1. From the **AP Configuration Options** screen, select **First Time Setup** and click **Next**.

   The **ERP System Setup** screen is displayed.



Note: The date and time in the **Last Vendor Update** column is based on the time and time zone of the OnBase database.

2. To create a new ERP system record, type the name of the ERP system in **New ERP System Name** and click **Add**. The ERP system is added to the **Configured ERP Systems** list.

3. To modify previously configured ERP systems, select the ERP system in the **Configured ERP Systems** list and perform one of the following:
   - Click **Edit** to rename the ERP system. The **Edit ERP System** dialog box is displayed, allowing you to type a new name and click **Submit**.
   - Click **Delete** the delete the ERP system. This action deletes all vendor data associated with the ERP system, as well as all scan queue mappings, Document Type mappings, and Keyword Type mappings associated with the ERP system. The user's password is required to confirm the deletion.

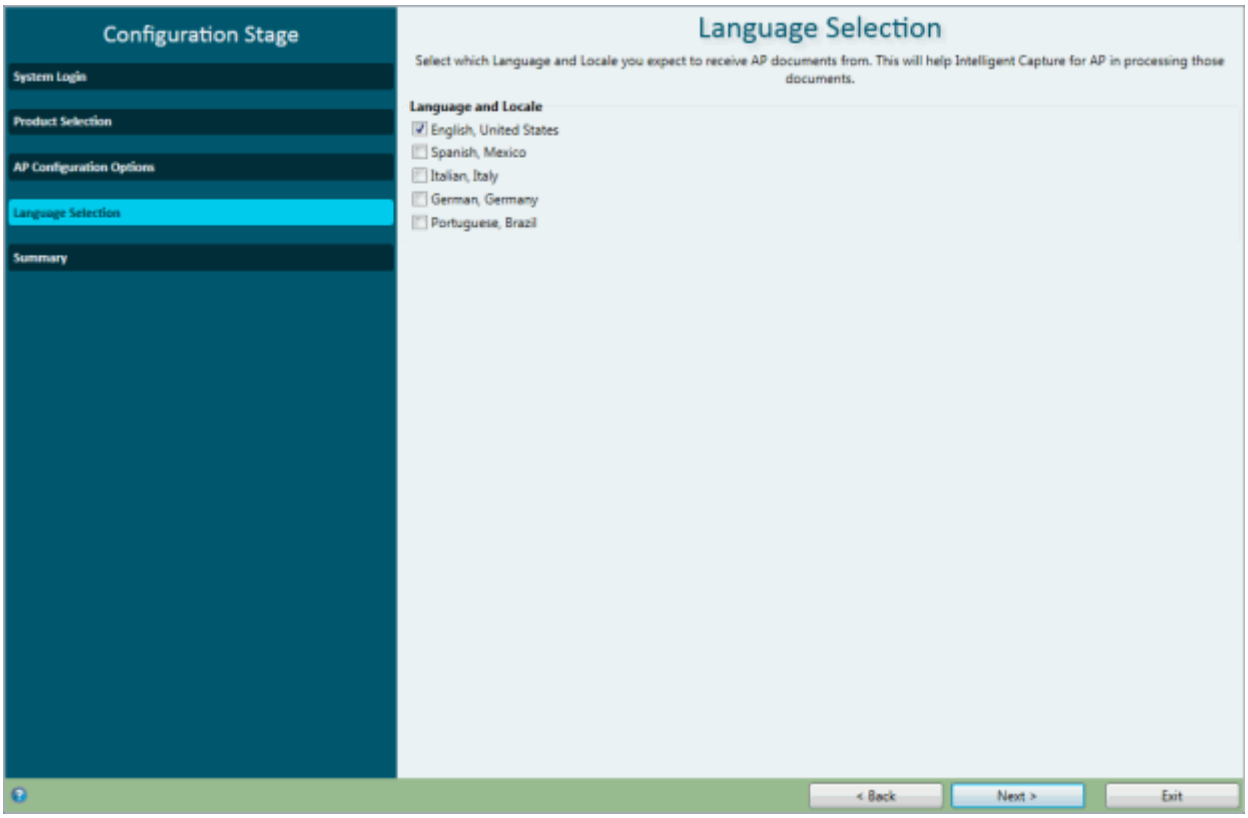
Caution: The **Unlock** button should only be used if a pre-existing ERP system has become locked due to an unexpected issue. Unlocking an ERP system during an active vendor data update could result in data conflicts for the Intelligent Capture for AP engine. For more information, see Troubleshooting on page 15 or contact your first line of support.

4. Click **Next** to proceed to the next step in first time setup.

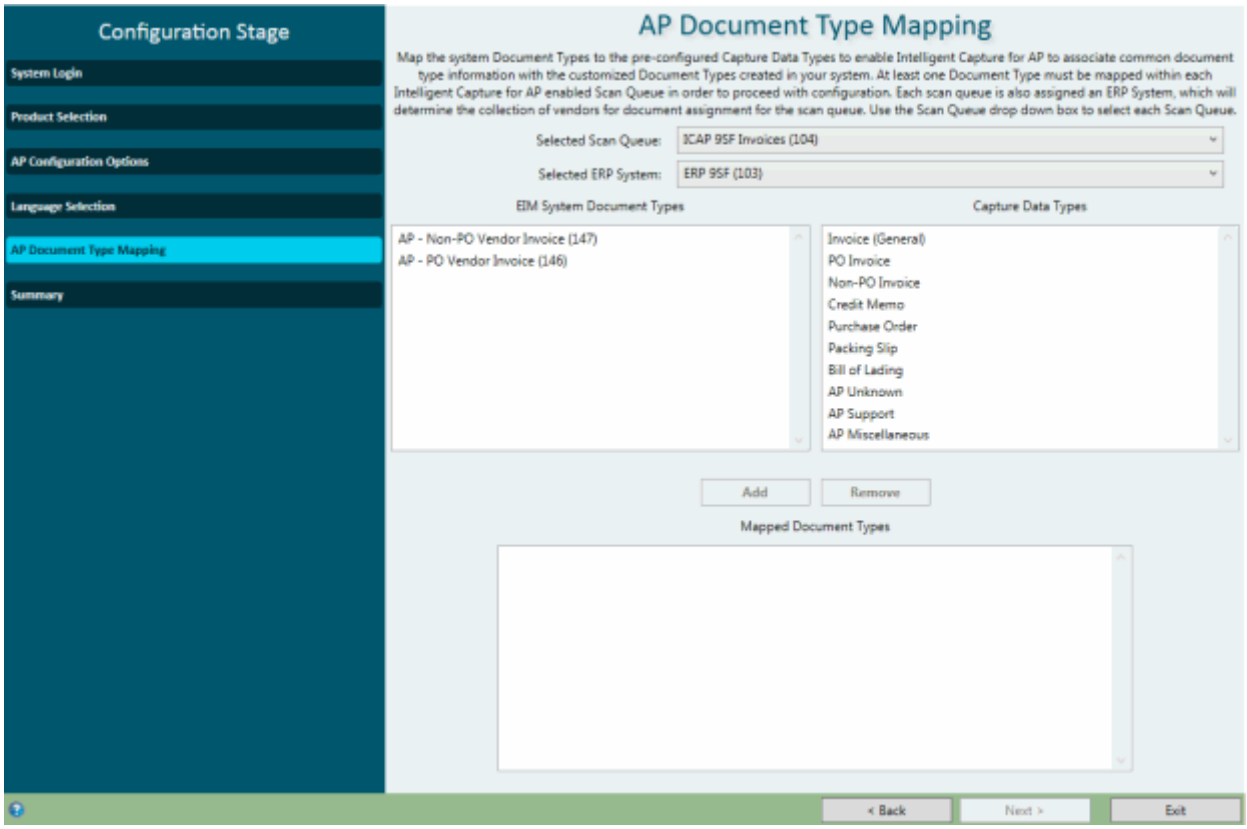
Mapping AP Data Types

To map pre-configured AP Document Types and Keyword Types to OnBase Document Types and Keyword Types:

1. Within the **Data Capture Configuration** window, once you select **Map AP Data Types** and proceed, the **Language Selection** screen is displayed.



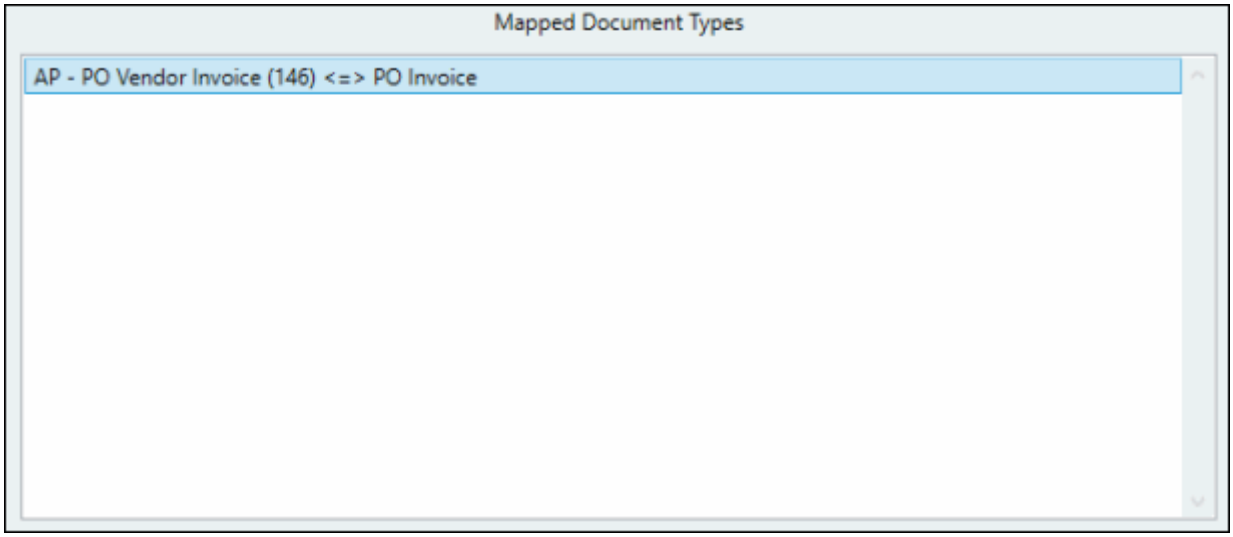
2. From the **Language and Locale** list, select the language(s) and locale(s) from which you expect to receive AP documents in your solution. These selections will assist the Intelligent Capture for AP engine in processing those documents.
3. When finished selecting the language(s) and locale(s), click **Next**. The **AP Document Type Mapping** screen is displayed.



4. Map each scan queue enabled for Intelligent Capture for AP with the ERP system containing vendor identification data for the documents to be processed by that scan queue:
   a. From the **Selected Scan Queue** drop-down list, select a scan queue that you want to map to an ERP system.
   b. From the **Selected ERP System** drop-down list, select the ERP system containing vendor identification data for the selected scan queue.

   A scan queue can only be mapped to one ERP system, but multiple scan queues can be mapped to the same ERP system.
5. Within each scan queue, you must map at least one OnBase Document Type to a capture AP Document Type to associate common Document Type information. To add a new mapped Document Type pair:
   a. From the **Selected Scan Queue** drop-down list, select a scan queue associated with the OnBase Document Type you want to map to an AP Document Type.
   b. From the **EIM System Document Types** list, select the OnBase Document Type you want to map.

c. From the **Capture Data Types** list, select the AP Document Type you want to map to the OnBase Document Type.
d. Click **Add**. The mapped pair is added to the **Mapped Document Types** list.



You can only map a single AP Document Type to a single OnBase Document Type. When you add a mapped pair, both Document Types are removed from the **EIM System Document Types** list and **Capture Data Types** list.

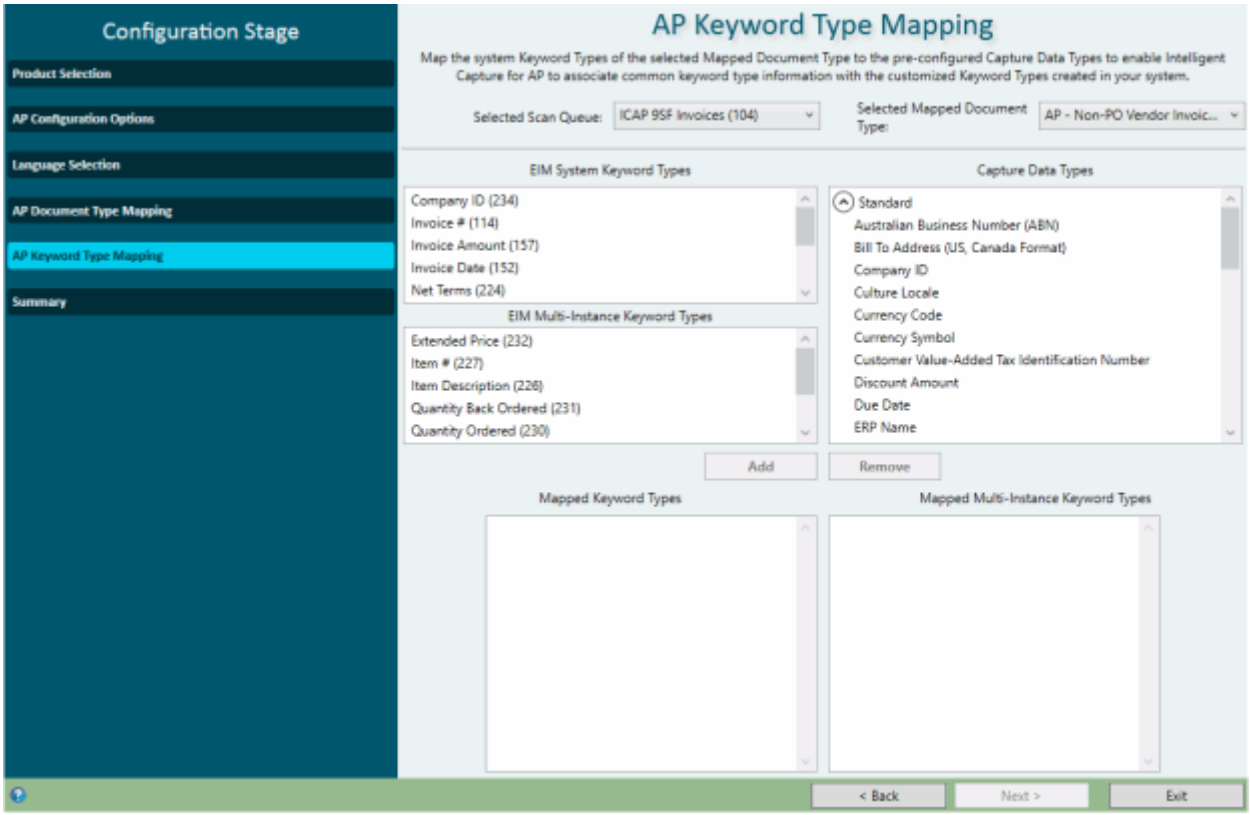
Additionally, each primary AP Document Type (invoices, purchase orders, packing slips, or bills of lading) must be mapped in a separate scan queue, but **PO Invoice** and **Non-PO Invoice** can be mapped in the same scan queue.

When you add one of these primary AP Document Types to a mapped pair, the other primary AP Document Types are removed from the **Capture Data Types** list. The secondary AP Document Types (**AP Unknown**, **AP Support**, and **AP Miscellaneous**) remain available for mapping.

For more information on the functions of primary and secondary AP Document Types, see Primary and Secondary AP Document Types on page 160.

6. To remove a mapped Document Type pair:
   a. From the **Mapped Document Types** list, select the mapped pair you want to remove.
   b. Click **Remove**. The mapped pair is removed from the **Mapped Document Types** list. The Document Types from the pair are added back to the **EIM System Document Types** list and **Capture Data Types** list, and any mapped Keyword Type pairs associated with this Document Type pair are also removed.

7. When finished mapping Document Types, click **Next**. The **AP Keyword Type Mapping** screen is displayed.



8. From the **Selected Scan Queue** drop-down list, select the scan queue associated with the Document Type pair for which you want to map Keyword Types.
9. From the **Selected Mapped Document Type** drop-down list, select the mapped Document Type pair for which you want to map Keyword Types. Single-instance and multi-instance Keyword Types that have been configured for the OnBase Document Type in the selected Document Type pair are displayed in the **EIM System Keyword Types** and **EIM Multi-Instance Keyword Types** lists, respectively.

Tip: You can map OnBase multi-instance Keyword Types to the corresponding AP Keyword Types to assist in line item extraction during ICAP processing. To add a new multi-instance Keyword Type pair, see step 11.

10. For each Document Type, map each OnBase Keyword Type with its corresponding capture data type.

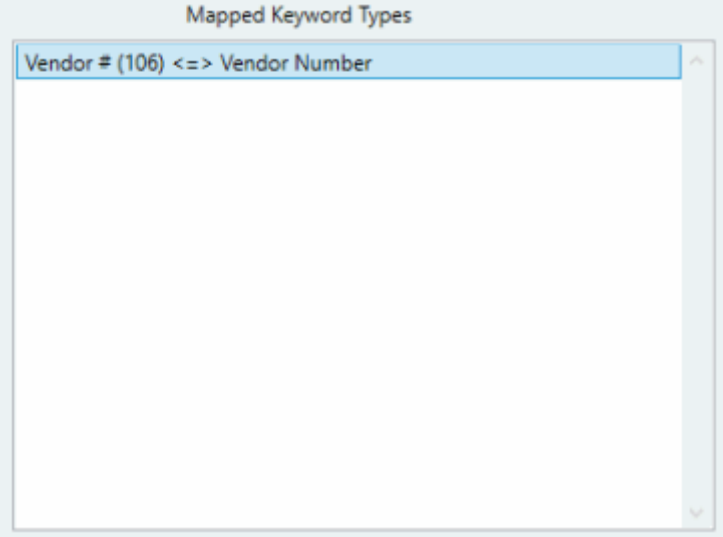
Note: The **ERP Name**, **Company ID**, and **Vendor Status** capture data types are reserved for identification and retrieval purposes, and they are not included in ICAP training. For more information, see Reserved Capture Data Types on page 108.

To add a new mapped single-instance Keyword Type pair:

a. From the **EIM System Keyword Types** list, select the OnBase single-instance Keyword Type you want to map.
b. From the **Capture Data Types** list, select the AP Keyword Type you want to map to the OnBase single-instance Keyword Type.

Tip: Each AP Keyword Type is listed under a category. To hide or expand a specific category of AP Keyword Types in the **Capture Data Types** list, click the arrow displayed next to the corresponding category.

c. Click **Add**. The mapped single-instance pair is added to the **Mapped Keyword Types** list.



Note the following while adding mapped single-instance Keyword Type pairs:

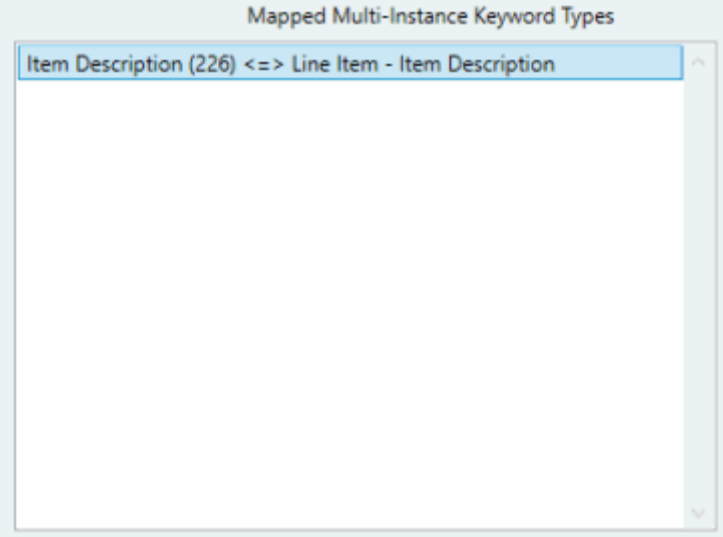
- While you can map a single AP Keyword Type to multiple OnBase Keyword Types, you cannot map multiple AP Keyword Types to a single OnBase Keyword Type. Therefore, when you add a mapped pair, the OnBase Keyword Type is removed from the **EIM System Keyword Types** list, but the AP Keyword Type remains in the **Capture Data Types** list.
- If you are configuring a first time setup for your solution, to complete your setup successfully, you must include an **EIM System Keyword Type** that corresponds to a Vendor Name or Vendor Number in one or more of your mapped Keyword Type pairs.
- If you want Intelligent Capture for AP to process multiple date and currency formats, you must include an **EIM System Keyword Type** that corresponds to a Culture Locale in one or more of your mapped Keyword Type pairs.

11. To add a new mapped multi-instance Keyword Type pair:
    a. From the **EIM Multi-Instance Keyword Types** list, select the OnBase multi-instance Keyword Type you want to map.
    b. From the **Capture Data Types** list, select the AP Keyword Type you want to map to the OnBase multi-instance Keyword Type.

Note: The AP Keyword Types intended to be mapped to OnBase multi-instance Keyword Types are denoted by the **Line Item –** prefix (e.g., **Line Item – Item Description**).

Tip: To allow the Intelligent Capture for AP engine to differentiate between duplicate line items, you can map a numeric OnBase Keyword Type (e.g., **Line Number**) to the **Line Item – Auto Counter** Data Capture Type.

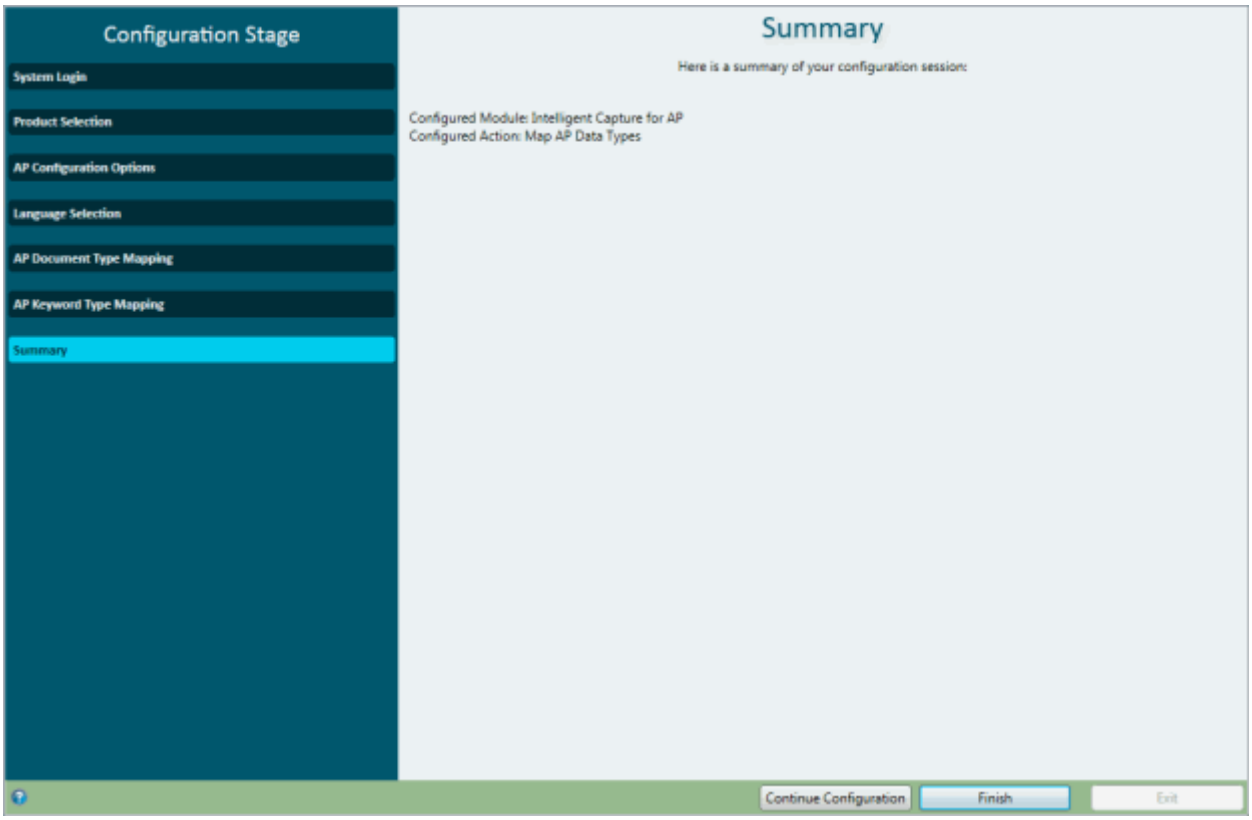
c. Click **Add**. The mapped multi-instance pair is added to the **Mapped Multi-Instance Keyword Types** list.



Note: While you can map a single AP Keyword Type to multiple OnBase Keyword Types, you cannot map multiple AP Keyword Types to a single OnBase Keyword Type. Therefore, when you add a mapped pair, the OnBase Keyword Type is removed from the **EIM Multi-Instance Keyword Types** list, but the AP Keyword Type remains in the **Capture Data Types** list.

12. To remove a mapped Keyword Type pair:
    a. From either the **Mapped Keyword Types** or the **Mapped Multi-Instance Keyword Types** list, select the mapped pair you want to remove.
    b. Click **Remove**. The mapped pair is removed from either the **Mapped Keyword Types** or the **Mapped Multi-Instance Keyword Types** list, and the OnBase Keyword Type from the pair is added back to the **EIM System Keyword Types** or **EIM Multi-Instance Keyword Types** list.

13. When finished mapping Keyword Types, click **Next**. The **Summary** screen is displayed.



A brief summary of your configuration settings is listed. Once you are finished reviewing the summary, do one of the following:

- To save your configuration changes and return to the **Product Selection** screen, click **Continue Configuration**.
- To save your configuration changes and close the **Data Capture Configuration** window, click **Finish**.

Reserved Capture Data Types

Most capture data types available to be mapped in the **AP Keyword Type Mapping** screen are designed to find specific types of data on a document image, populate the corresponding OnBase Keyword Type with the data value, and then train the Intelligent Capture for AP engine to learn the location of the Keyword Values. The only exceptions are the **ERP Name**, **Company ID**, and **Vendor Status** capture data types, which are not included in ICAP training because their values do not typically appear on physical documents. These capture data types are reserved for identification and retrieval purposes in OnBase.

The **ERP Name** capture data type populates its corresponding Keyword Type with the name of the ERP system mapped to the scan queue used to import the document into Intelligent Capture for AP. The ERP system is mapped to the scan queue on the **AP Document Type Mapping** screen of the **Map AP Data Types** process.

The **Company ID** capture data type uses the company ID from the Vendor Value data for the vendor identified for the document. The company ID identifies the company entity associated with a vendor in a multi-company ERP system, and it is tied to the vendor number and vendor name to represent a single unique vendor record. The company ID values for vendors are imported into the system with the rest of the vendor data when importing a vendor data import file. For more information, see Importing Vendor Data From a File on page 109.

Note: If your solution does not involve a multi company ERP system, the **Company ID** Keyword Type is blank and does not need to be mapped.

The **Vendor Status** capture data type populates its corresponding Keyword Type with the status of the vendor identification process that documents undergo during ICAP processing. To record the status of the vendor identification process in a Keyword Value, include an **EIM System Keyword Type** that corresponds to **Vendor Status** in one of your mapped Keyword Type pairs. The values that the Intelligent Capture for AP engine can assign to **Vendor Status** include the following:

- **IDENTIFIED**
- **NO VENDORS MATCHED EXCEPTION**
- **MULTIPLE VENDORS MATCHED EXCEPTION**
- **NO RESULT FOUND**

Note: The **NO RESULT FOUND** status is only assigned to an AP Support Document Type on which no OCR processing was performed.

- **ERROR**

Note: The **Invoice Type**, **Remit to Address Status**, **Invoice Number Status**, **PO Number Status**, **Header Extraction Status**, and **Line Item Extraction Status** capture data types should not be included in any of your mapped Keyword Type pairs. These capture data types are reserved for future functionality.

Importing Vendor Data From a File

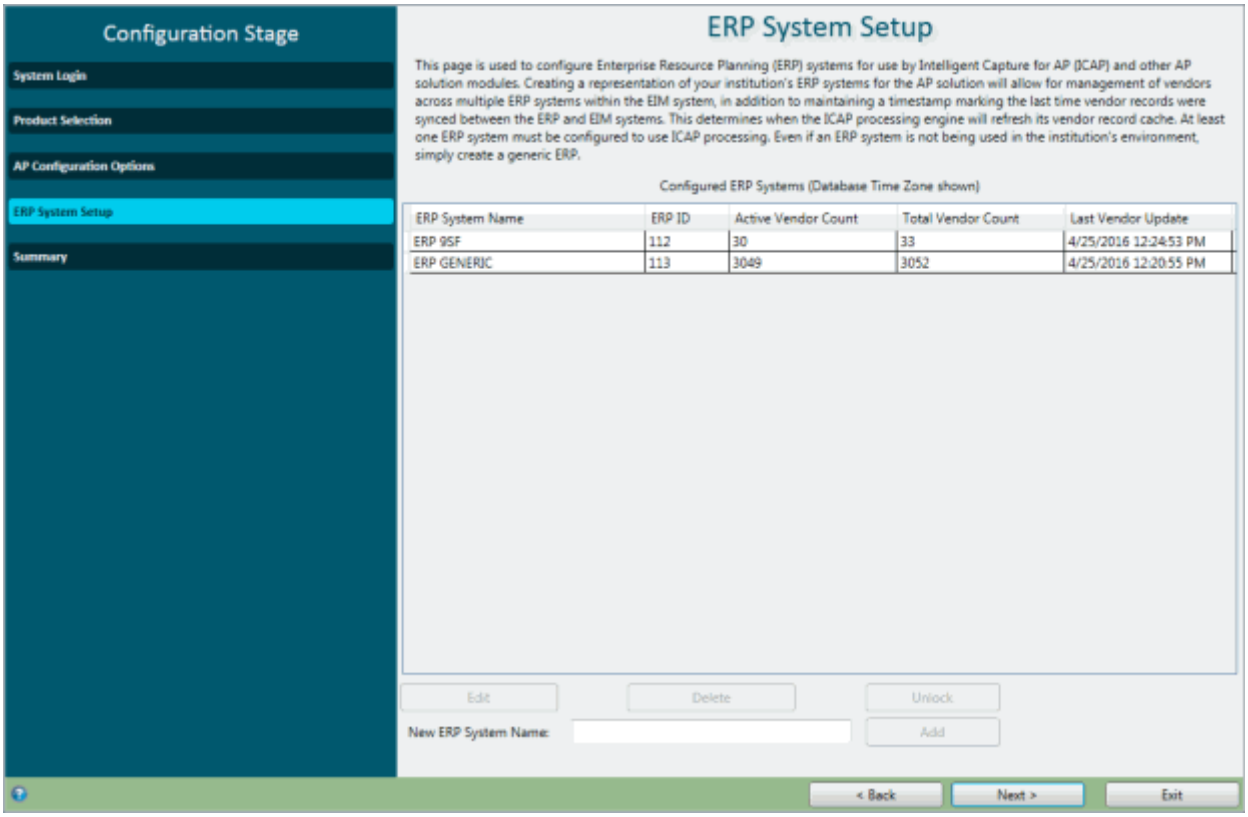
To import vendor data from a .csv or .xlsx file, your database must have a representation of the Enterprise Resource Planning (ERP) system from which the vendor data is derived. This feature allows you to manage vendor data from multiple ERP systems while keeping the data from each ERP system separate.

At least one ERP system record must be configured to use ICAP processing. Even if an ERP system is not being used in your environment, simply create a generic ERP system configuration record.

To import vendor data from a **.csv** or **.xlsx** file:

1. From the **AP Configuration Options** screen, select **Configure ERP Vendor Data** and click **Next**.

   The **ERP System Setup** screen is displayed.



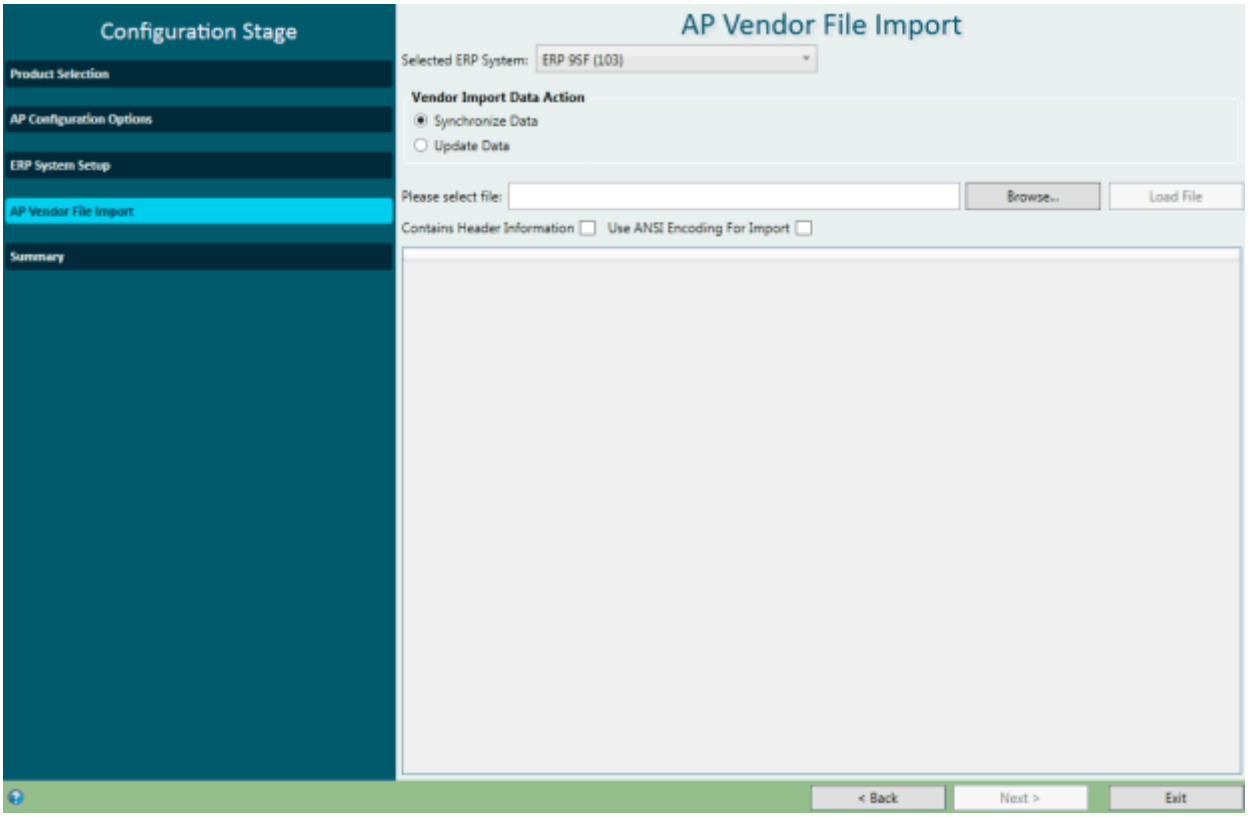
Note: The date and time in the **Last Vendor Update** column is based on the time and time zone of the OnBase database.

2. To create a new ERP system record, type the name of the ERP system in **New ERP System Name** and click **Add**. The ERP system is added to the **Configured ERP Systems** list.

3. To modify previously configured ERP systems, select the ERP system in the **Configured ERP Systems** list and perform one of the following:
    - Click **Edit** to rename the ERP system. The **Edit ERP System** dialog box is displayed, allowing you to type a new name and click **Submit**.
    - Click **Delete** the delete the ERP system. This action deletes all vendor data associated with the ERP system, as well as all scan queue mappings, Document Type mappings, and Keyword Type mappings associated with the ERP system. The user's password is required to confirm the deletion.

Caution: The **Unlock** button should only be used if a pre-existing ERP system has become locked due to an unexpected issue. Unlocking an ERP system during an active vendor data update could result in data conflicts for the Intelligent Capture for AP engine. For more information, see Troubleshooting on page 15 or contact your first line of support.

4. Click **Next**. The **AP Vendor File Import** screen is displayed.



a. Use the **Selected ERP System** drop-down list to select the appropriate ERP system to load with vendor data.

b. In the **Vendor Import Data Action** section, select one of the following:

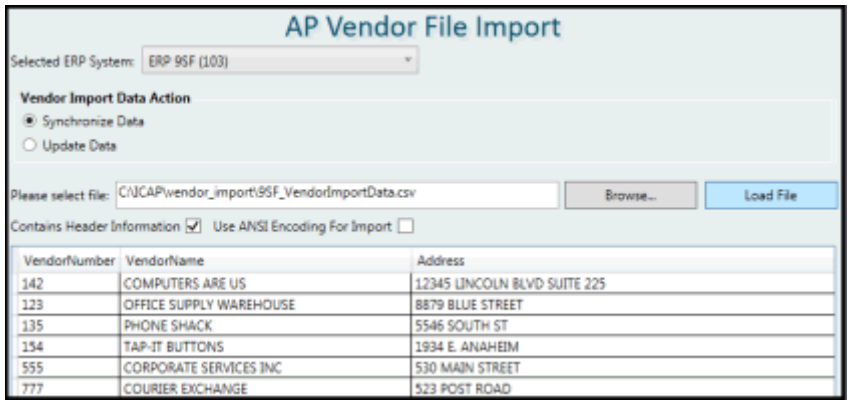
   - Select **Synchronize Data** to overwrite the data already residing in the system with the data from the import file. This option compares the existing vendor data in the system to the import file data, and it adds new data, updates existing data, and removes system data not found in the import file.
   - Select **Update Data** to supplement the data already residing in your database with the data you are importing. This option compares the existing vendor data in the system to the import file data, and it only adds new data and updates system data that differs from the import file data.

c. Once you have selected an import action, browse to a **.csv** or **.xlsx** file containing the vendor data to be imported. If you are importing data from a **.csv** file and the file includes headers for the groups of data in the file, select **Contains Header Information**.

   If the file includes ANSI characters, select **Use ANSI Encoding For Import**.

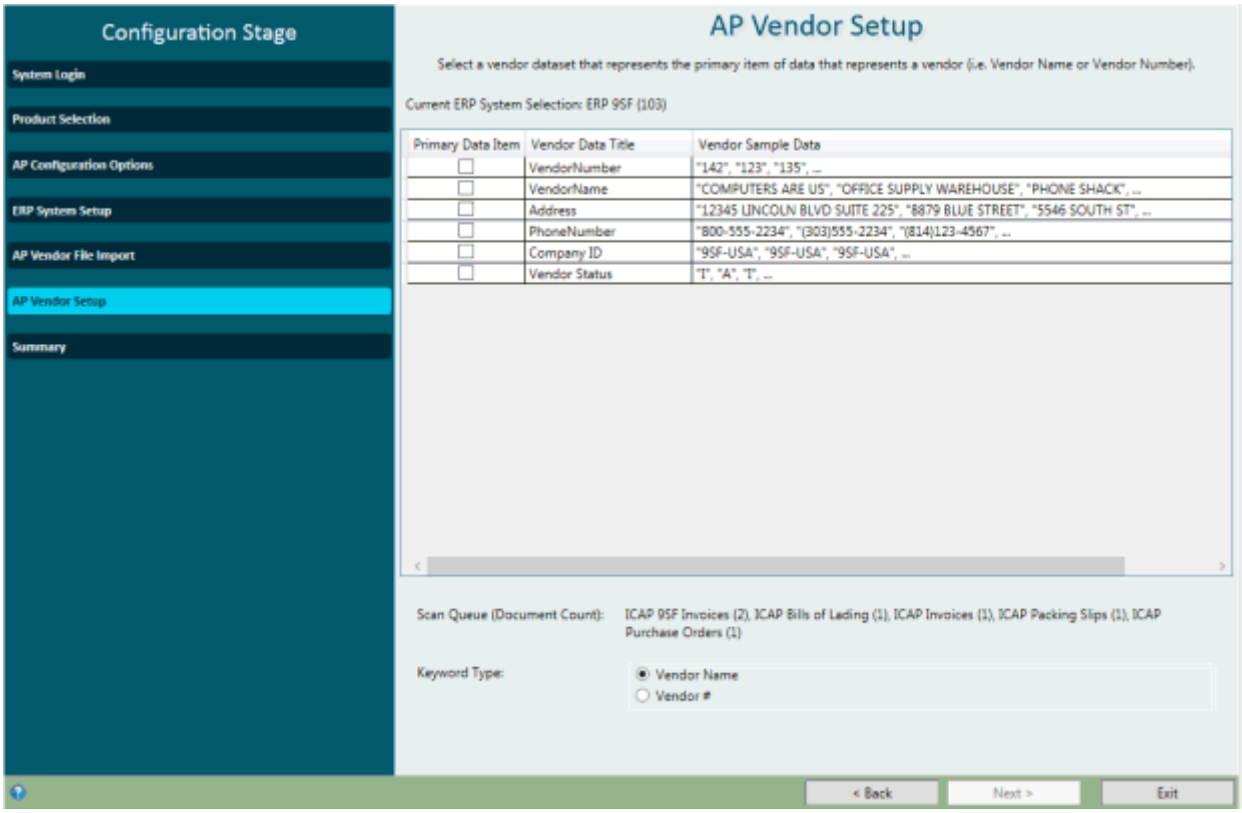
d. Click **Load File**. If the load is successful, the data from the import file is displayed in a table.

Note: If the **.csv** or **.xlsx** import file contains an invalid XML character, a message is displayed and the data is not imported.



e. Once you are finished reviewing the data, click **Next**.

5. The **AP Vendor Setup** screen is displayed.

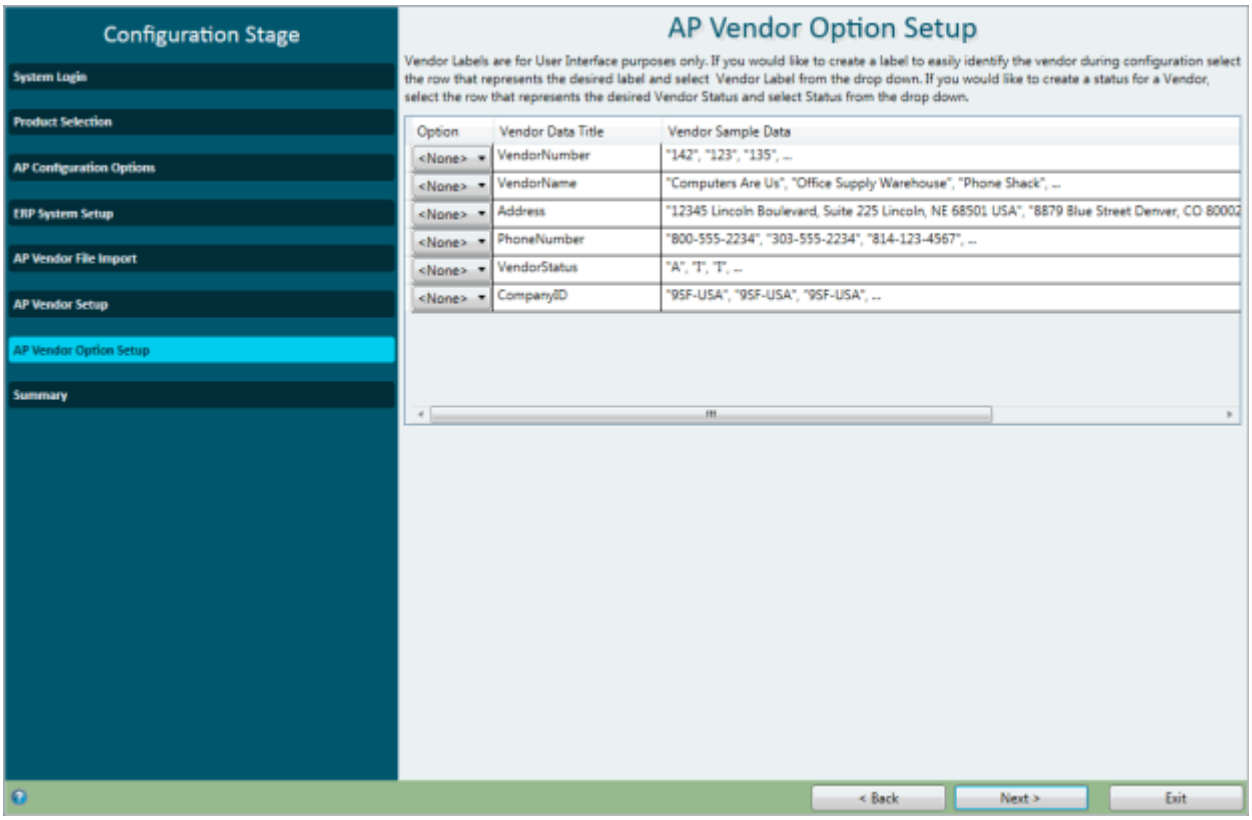


The vendor data from the import file is listed according to **Vendor Data Title** (i.e., the headers in the import file). Select the check box in the **Primary Data Item** column next to the title that will be used to represent a vendor (e.g., Vendor Name or Vendor Number). Then select the appropriate Keyword Type to be associated with the vendor data.

Note: Depending on your configuration, this primary data item may serve as the primary Keyword of an AutoFill Keyword Set, populating other vendor information (e.g., phone number, street address, email address, etc.) that has been stored about the vendor and included as Keywords on the vendor's invoices. If you configure a vendor label in the next step, this primary Keyword Value can also be used to assign a value to the complementary vendor name/number Keyword Value that serves as the vendor label. For more information, proceed to the next step.

Once you are finished making your selections, click **Next**.

6. The **AP Vendor Option Setup** screen is displayed.



As in the previous step, the vendor data from the import file is listed according to **Vendor Data Title**. Here you have the option of configuring the values from one of these Data Sets to be used as vendor labels, status indicators, or company ID values.

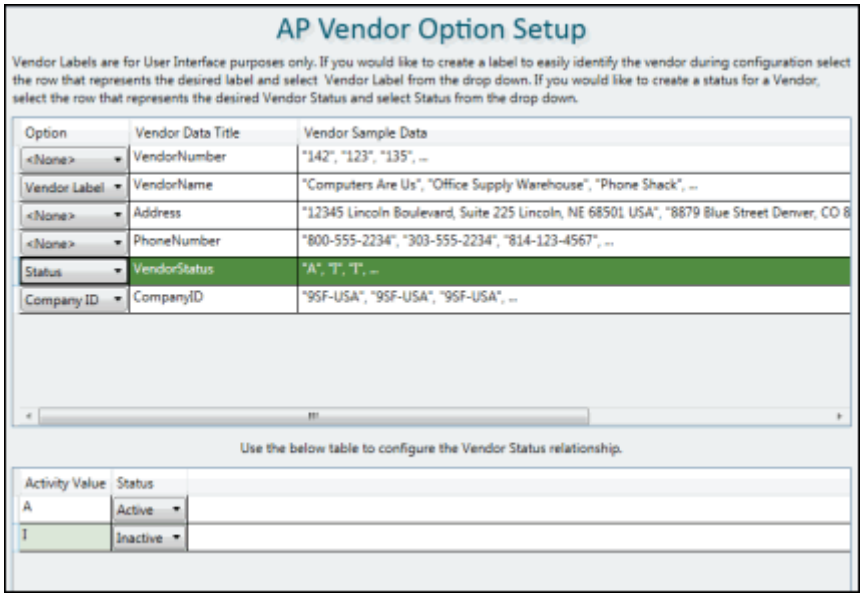
- Vendor labels help you easily identify vendors during the configuration process.
- Status indicators identify whether a vendor is active or inactive. Only vendors with an active status are included in the drop-down lists for Vendor Name and Vendor Number during index verification.
- Company ID values identify the company entity associated with a vendor in a multi-company ERP system. The company ID is tied to the vendor number and vendor name to represent a single unique vendor record. Company ID values can be mapped to a Keyword Type for retrieval and identification purposes.

To configure a Data Set as one of these special data types:

a. To configure vendor labels, select **Vendor Label** in the **Option** column next to the Data Set whose values are to be used as vendor labels in your configuration. The values in the selected Data Set serve as the secondary vendor name/number Keyword Values, which will be automatically assigned according to the primary vendor name/number Keyword Value (i.e., the primary data item configured in the previous step).

b. To configure status indicators, select **Status** in the **Option** column next to the Data Set whose values indicate vendor status. The vendor status values are displayed in a

table below the Data Sets table.

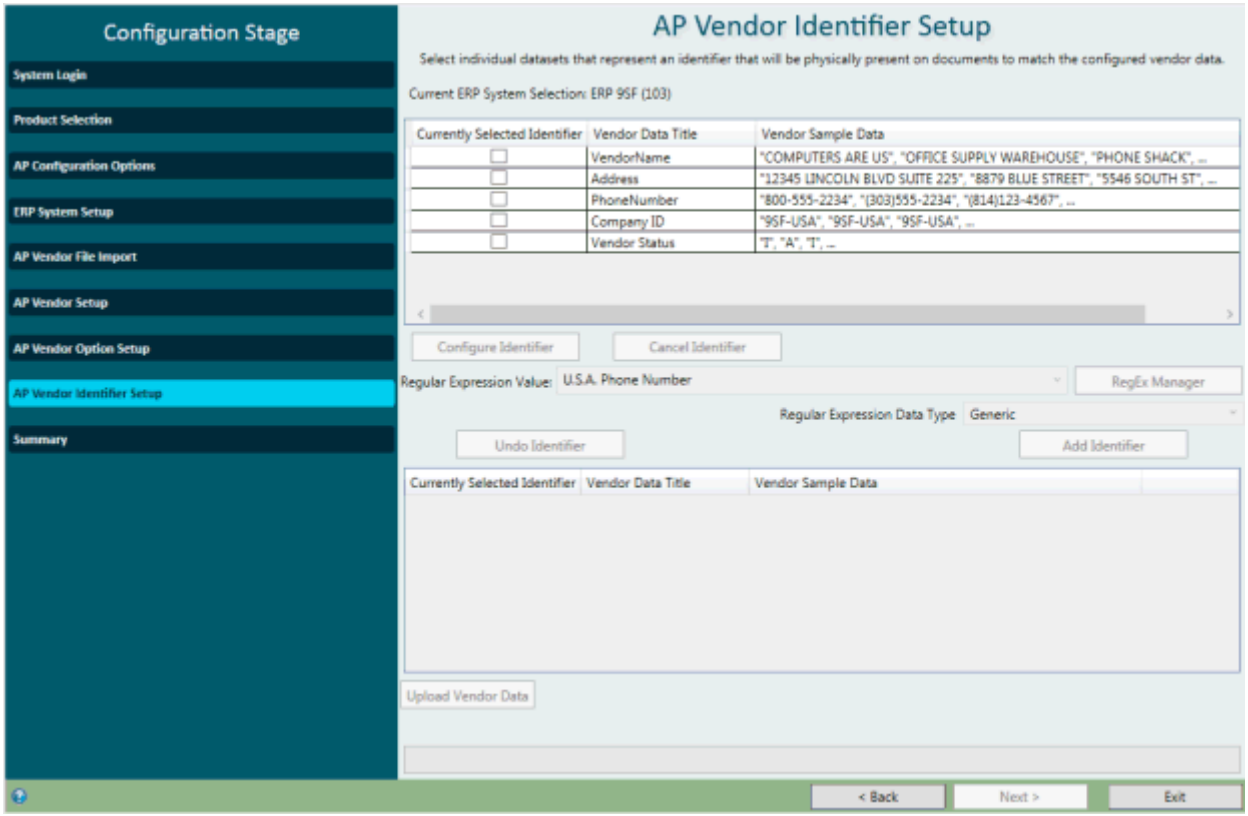


For each unique value in the **Activity Value** column, configure the status of that value by selecting **Active** or **Inactive** in the **Status** column.

c. To configure company ID values, select **Company ID** in the **Option** column next to the Data Set that contains the company ID values for the vendor data being imported.

Once you are finished making your selections, click **Next**.

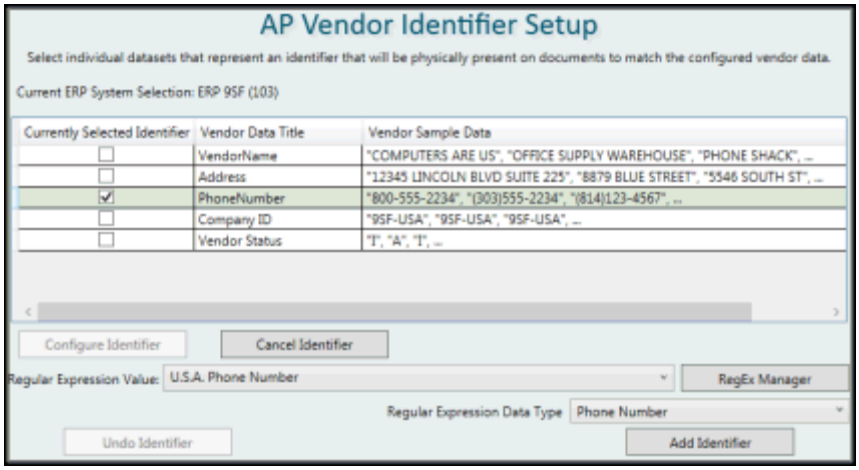
7. The **AP Vendor Identifier Setup** screen is displayed.



The remaining vendor data from the import file (i.e., the data that was not selected as a Primary Data Item on the **AP Vendor Setup** screen) is listed according to **Vendor Data Title** in the upper table. Once an identifier is configured for a Data Set, the Data Set is moved to the lower table.

a. Select the check box in the **Currently Selected Identifier** column next to the Data Set that will be used to identify vendors. The values in this Data Set should be ones that will physically appear on invoices, and they will typically take the form of phone numbers, street addresses, email addresses, etc.

b. Once you select a Data Set, click **Configure Identifier** to enable additional configuration options.



Note: After clicking **Configure Identifier**, you can abort the process of configuring the currently selected identifier by clicking **Cancel Identifier**. This allows you to cancel the identifier without having to first complete its configuration and then undo the entire process.

c. From the **Regular Expression Value** drop-down list, select a regular expression to associate with the Data Set.

Note: The **General Phone Number** regular expression can be used to find both United States and non-United States phone numbers. If you use this regular expression to find United States phone numbers, be aware that it is less restrictive than the **U.S.A. Phone Number** regular expression and can thus return more false positive results.

- If you want to manage the regular expressions in your solution, click **RegEx Manager** to open the **Regular Expression Library** dialog box. For more information on using this dialog box, see Managing the Regular Expression Library on page 154.

d. From the **Regular Expression Data Type** drop-down list, select a data type (e.g., Phone Number, Street Address, etc.) to associate with the Data Set. This selection instructs the Intelligent Capture for AP engine to use a specific type of logic when identifying data. For example, fuzzy matching can be applied to street addresses but not to phone numbers.

Note: You can select the **Inactive** data type from the **Regular Expression Data Type** drop-down list to prevent the corresponding Data Set from being used for vendor identification. For example, if different branches of the same company are represented as different vendors in the import file, those branches may share the same corporate phone number. You can associate the **Inactive** data type with the corresponding Data Set to prevent phone numbers from being used to identify vendors.

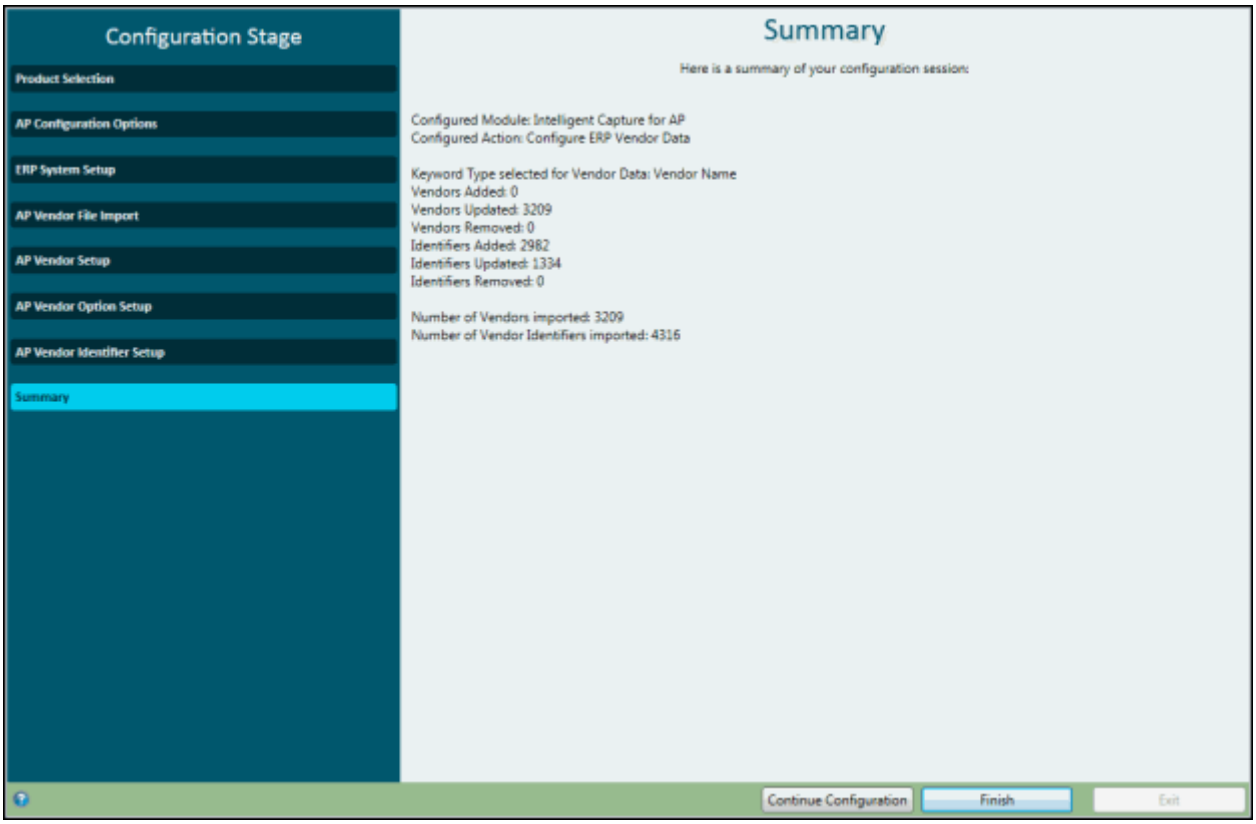
e. Once you have finished configuring the vendor identifier, click **Add Identifier** to ready the data for upload into OnBase. The Data Set is removed from the upper table and added to the lower table.
f. If you want to undo a vendor identifier configuration, select the **Currently Selected Identifier** check box in the vendor's listing in the lower table, and then click **Undo Identifier**. The Data Set you most recently configured as a vendor identifier is removed from the lower table and added back to the upper table.
g. If you want to configure additional vendor identifiers, select another Data Set from the upper table and repeat the previous steps to configure and add the identifier to the lower table.

Note: The order in which you add vendor identifiers for upload sets the precedence for the Intelligent Capture for AP engine to select vendors if there are conflicting vendor identifiers on a document.

h. Once you have finished configuring all vendor identifiers, click **Upload Vendor Data**. A status bar is displayed to show the progress of the data upload to OnBase. When the upload is complete, a message is displayed.

i. Once you are finished uploading vendor data, click **Next**. The **Summary** screen is displayed.

Note: If you are configuring the ERP system vendor data through First Time Setup, the **Schedule Vendor Script** screen is displayed before the **Summary** screen. See Configuring a Scheduled Vendor Import Process on page 120.



A brief summary of your configuration settings is listed. Once you are finished reviewing the summary, do one of the following:

- To save your configuration changes and return to the **Product Selection** screen, click **Continue Configuration**.
- To save your configuration changes and close the **Data Capture Configuration** window, click **Finish**.

Configuring a Scheduled Vendor Import Process

With the proper setup, the Data Capture Server Windows Service can run scheduled VB Scripts that import vendor data into your system on a regular basis. In addition to the file that contains the vendor data to be imported into your system, this process requires an XML configuration file that tells the service where to find and how to read the vendor data file, as well as a VB Script that tells the service where to find the XML configuration file. Once all of these pieces are in place, you can schedule a vendor import process in the Data Capture Configuration Tool.

To configure a scheduled vendor import process:

1. Create an XML configuration file that can properly read your vendor data import file. See Creating a Vendor Import Configuration File on page 121 for more information.
2. Create a VB Script that can locate the XML configuration file and execute the vendor data import process. See Creating a VB Script on page 123 for more information.
3. Schedule a process to run the VB Script at regular intervals. See Scheduling a Vendor Import Process on page 124 for more information.
4. Start (or, if already started, restart) the Data Capture Server Windows Service. To start or restart the service, use the Windows Administrative Tools (see the Windows help files for details).

Creating a Vendor Import Configuration File

Since vendor data may take on a variety of different forms, you must create an XML configuration file to interpret the types of data and the order in which they appear in the vendor data source file. This will allow the Data Capture Server Windows Service to process the data correctly when it imports the data into your system.

By default, when the Data Capture Configuration Tool is installed, a template for a vendor import XML configuration file (**VendorImportAutomationConfiguration.xml**) is created in the following location: **C:\Program Files (x86)\Hyland\Data Capture Configuration\Templates**. This template, which contains sample code similar to the following, can be used as a starting point when creating your XML configuration file:

```
<?xml version="1.0" encoding="utf-8" standalone="yes"?>
   <FileLayout>
      <FilePath>PathToVendorFile\VendorFile.csv</FilePath>
      <ERPID>Add number here</ERPID>
      <PrimaryValue>Add number here</PrimaryValue>
      <Header>True</Header> <!-- True or False -->
      <UseANSI>False</UseANSI> <!-- True or False -->
      <DataOrder>
         <!-- <Data value="AddVendorData"/> -->
         <!-- <Data value="AddVendorLabel"/> -->
         <!-- <Data value="AddCompanyID"/> -->
         <!-- <Data value="AddActivity" inactive="I|F"/> -->
         <!-- <Data value="AddAddress"/> -->
         <!-- <Data value="AddBlank"/> -->
         <!-- <Data value="AddUSAPhoneNumber"/> -->
         <!-- <Data value="AddURL"/> -->
         <!-- <Data value="AddGeneralPhoneNumber"/> -->
         <!-- <Data value="AddEmail"/> -->
         <!-- <Data value="AddOther" regEx="testRegex"/> -->
```

```
    </DataOrder>
</FileLayout>
```

For more information on these settings, see the table below.

<FileLayout> Attributes	Description
FilePath	This option specifies the file path of the vendor data source file (e.g., **C:\Data Capture Files\Vendor Data\VendorFile1.csv**).
ERPID	This option specifies the ERP ID of the ERP system into which the vendor data is to be imported.
PrimaryValue	This option specifies the Keyword Type number of the Keyword Type that represents the primary data value (i.e., Vendor Name or Vendor Number) from the vendor data source file. **Tip:** The Keyword Type number can be found in the upper-right corner of the **Keyword Type Configuration** dialog box within OnBase Configuration. See the **System Administration** module reference guide or help file for more information.
Header	This option specifies whether the vendor data source file contains header information (i.e., **True** or **False**).
UseANSI	This option specifies whether the vendor data source file will be imported using ANSI encoding (i.e., **True** or **False**). Set this option to **True** if the vendor data source file contains ANSI characters. If this option is set to **False**, or if this option is not included in the XML configuration file, the vendor data source file will be imported using UTF-8 encoding.

<FileLayout> Attributes	Description
DataOrder	This option consists of **Data value** settings listed in the order in which they appear in the vendor data source file. The values specified by these settings allow the Data Capture Server Windows Service to identify the types and order of the data being imported into your system. The following **Data value** settings are supported. Each setting represents the type of data contained in a column of the vendor data source file. • **AddAddress:** Address data. • **AddCompanyID:** Company ID data. • **AddEmail:** Email data. • **AddGeneralPhoneNumber:** Phone number data (possibly international). • **AddUSAPhoneNumber:** U.S. phone number data. • **AddURL:** URL data. • **AddVendorData:** Type of data that is unique to the vendor. • **AddVendorLabel:** Data for a vendor label. • **AddActivity**: Vendor status of active or inactive. This setting also requires a second attribute, **inactive**, which specifies which data values represent an inactive status. Data values for inactive must be in all capitals, and multiple data values are separated by a pipe character (|) with no spaces. For example: **<Data value="AddActivity" inactive="I|F"/>** • **AddBlank:** Blank column, or a column of data that should not be imported. • **AddOther:** Custom regular expression data. This setting also requires a second attribute, **regEx**, which is used to specify the name of the custom regular expression. For example: **<Data value="AddOther" regEx="testRegex"/>**

Creating a VB Script

Once you have created a vendor import XML configuration file, you must create a VB Script to locate the XML configuration file and execute the vendor data import process. VB Scripts are created within OnBase Configuration (see the **System Administration** module reference guide or help file for more information).

By default, when the Data Capture Configuration Tool is installed, a template for a VB Script (**VendorImportAutomationScript.txt**) is created in the following location: **C:\Program Files (x86)\Hyland\Data Capture Configuration\Templates**. This template, which contains sample code similar to the following, can be used as a starting point when creating a VB Script for your solution:

```
Dim filePath
filePath = "FilePath\VendorImportAutomationConfiguration.xml" 'point
to Vendor Import Automation Configuration file
```

```
Set fso = CreateObject ("Scripting.FileSystemObject")
Set stdout = fso.GetStandardStream (1)
stdout.WriteLine("AutomatedVendorUpload")
stdout.WriteLine(filePath)
```

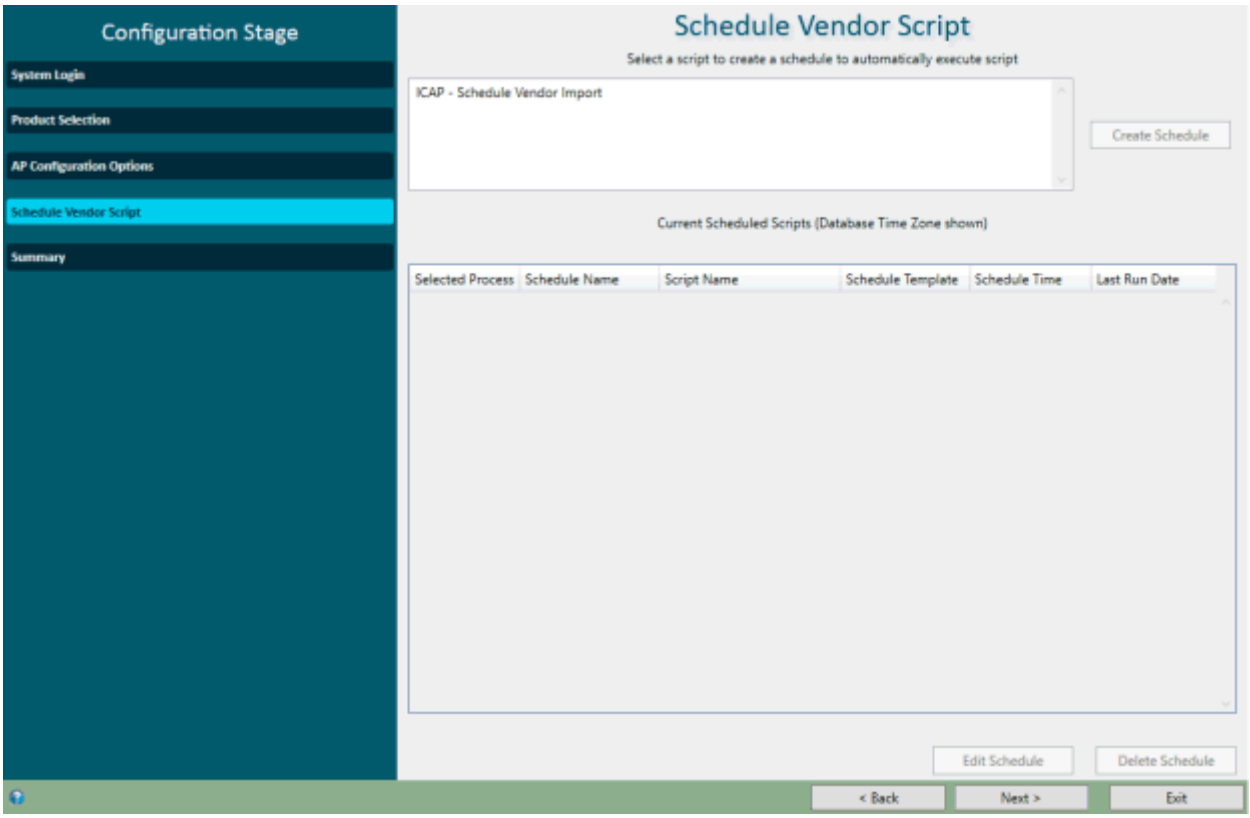
Note: While you may be able to use much of this sample script in your solution, you must change the **filePath** value to match the file path of your XML configuration file (e.g., **filePath = C:\Program Files (x86)\Hyland\Data Capture Configuration\Templates\VendorImportAutomationConfiguration.xml"**).

Scheduling a Vendor Import Process

Once you have created both a vendor import XML configuration file and a corresponding VB Script, you can create a schedule for regular, automated vendor data imports.

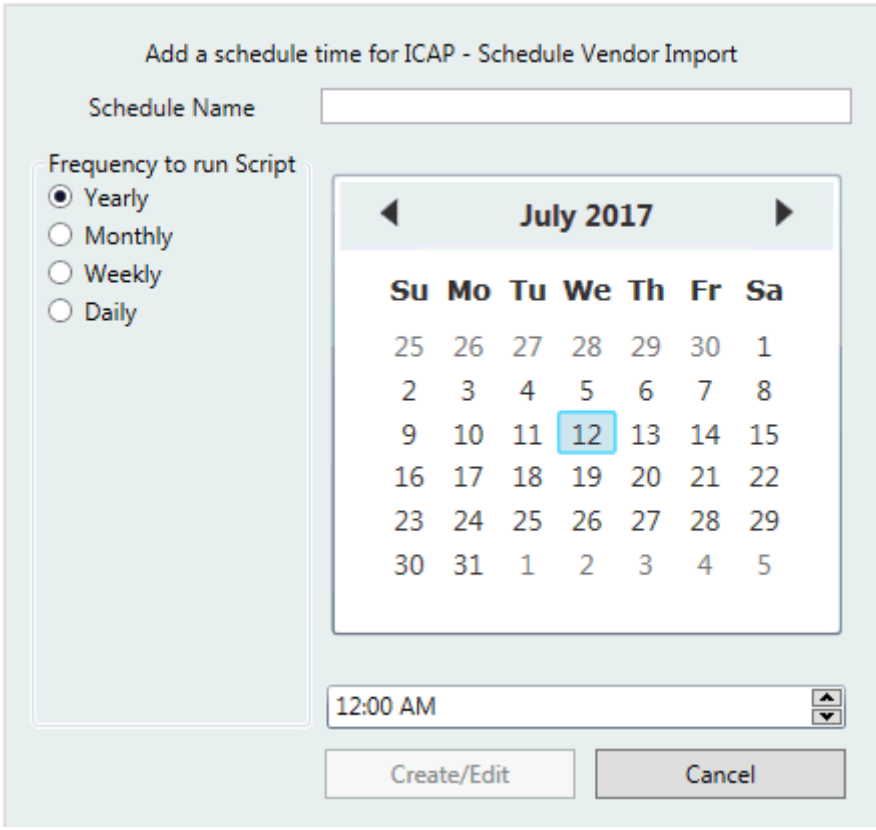
To schedule a process for importing vendor data at regular intervals:

1. Within the **Data Capture Configuration** window, once you select **Setup Scheduled Vendor Import Process** and proceed, the **Schedule Vendor Script** screen is displayed.



On the top half of this screen, a list of all available VB Scripts from OnBase is displayed. For more information on creating and configuring VB Scripts, see the **System Administration** module reference guide or help file.

2. Select an appropriate VB Script and click **Create Schedule**. The **Schedule** dialog box is displayed.



3. In the **Schedule Name** field, enter a name for the scheduled process.
4. In the **Frequency to run Script** section, select the frequency at which the scheduled process should be run. Then set the secondary options that are applicable to your selected frequency.
   - **Yearly.** When this frequency is selected, a calendar is displayed. Use the calendar to select the day on which the scheduled process should be run.

Tip: To quickly select a different month/year to be displayed, click the calendar heading (in the example above, **April, 2013**) once to view all months of the year or twice to view all years of the decade, then select the desired year and month to return to the default view from which a day can be selected.

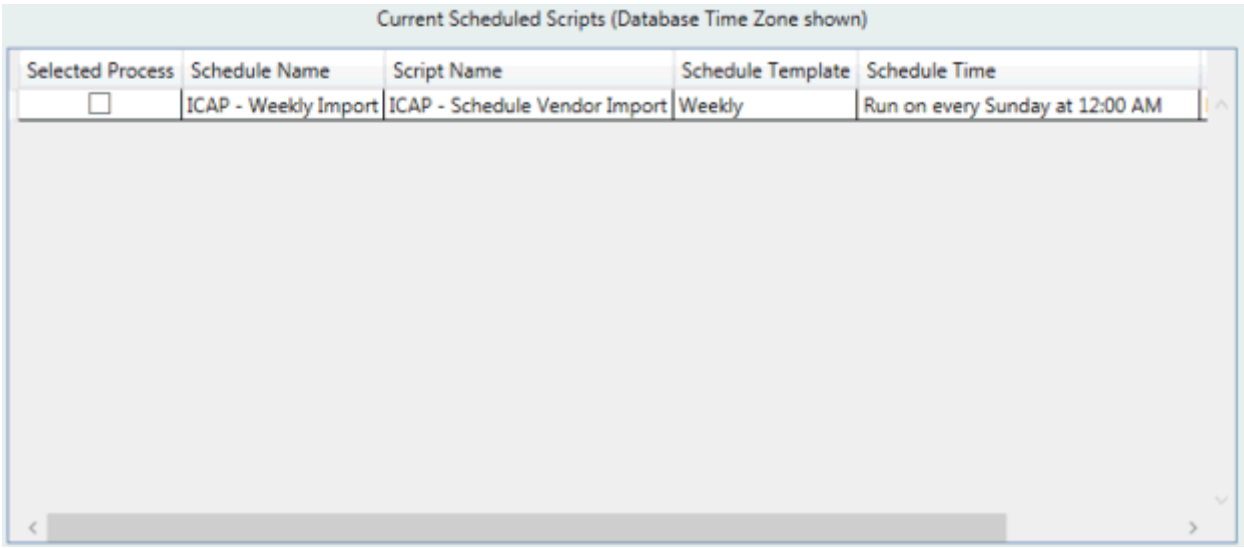
   - **Monthly.** When this frequency is selected, a drop-down menu containing all possible dates of the month (i.e., **1** to **31**) is displayed. Select the date on which the scheduled process should be run each month.
   - **Weekly.** When this frequency is selected, a drop-down menu containing all days of the week (i.e., **Sunday** to **Saturday**) is displayed. Select the day on which the scheduled process should be run each week.

- **Daily.** When this frequency is selected, no secondary options are displayed. Proceed to the next step.

5. In the **Time** field, enter the time at which the scheduled process should be run on each day for which it is set to run.

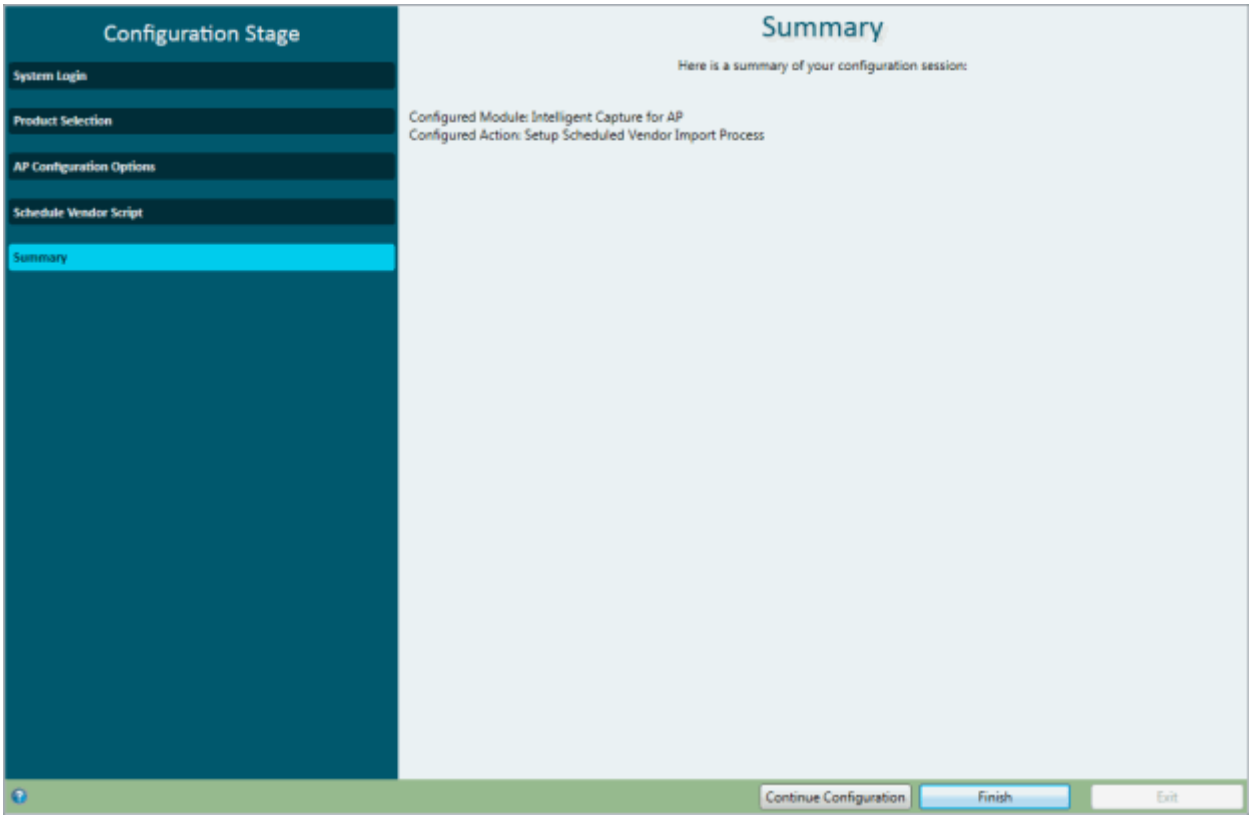
Note: The time at which the scheduled process will run is based on the time and time zone of the OnBase database.

6. When you are finished configuring the settings for the scheduled process, click **Create/Edit**. The process is added to the **Current Scheduled Scripts** list on the **Schedule Vendor Script** screen.



7. To edit a scheduled process, in the **Current Scheduled Scripts** list, select the check box next to the process's listing and click **Edit Schedule**. The **Schedule** dialog box is displayed. Edit the settings for the scheduled process as desired, using steps 3 to 6 for reference.
8. To delete a scheduled process, in the **Current Scheduled Scripts** list, select the check box next to the process's listing and click **Delete Schedule**. When the confirmation message is displayed, click **OK** to complete the deletion.

9. Once you are finished creating, editing, and/or deleting scheduled processes for importing vendor data, click **Next >**. The **Summary** screen is displayed.



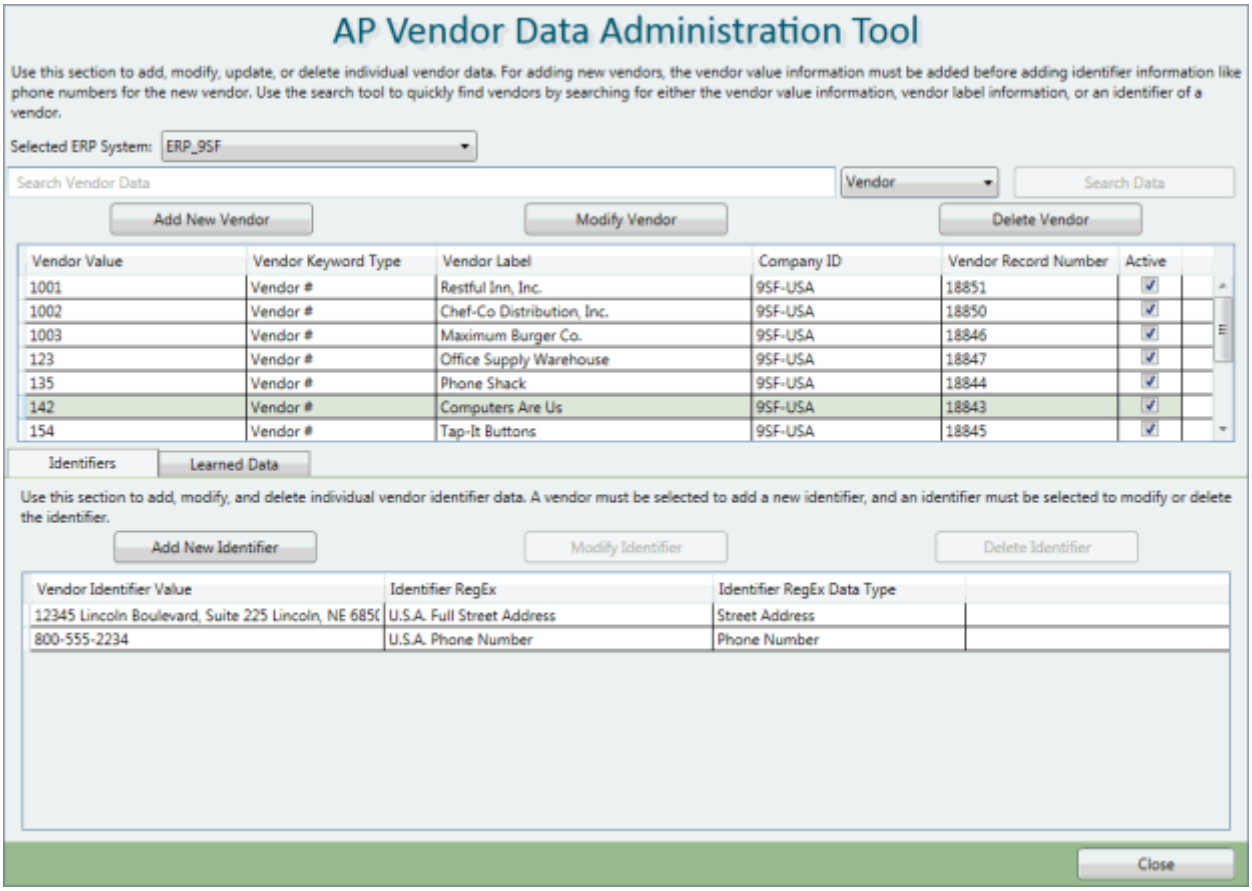
A brief summary of your configuration settings is listed. Once you are finished reviewing the summary, do one of the following:

- To return to the **Product Selection** screen, click **Continue Configuration**.
- To save your configuration and close the **Data Capture Configuration** window, click **Finish**.

Modifying Vendor Data

You can modify existing vendor data using the AP Vendor Data Administration Tool. To modify or delete existing vendor data, or to add new vendor data on an individual basis:

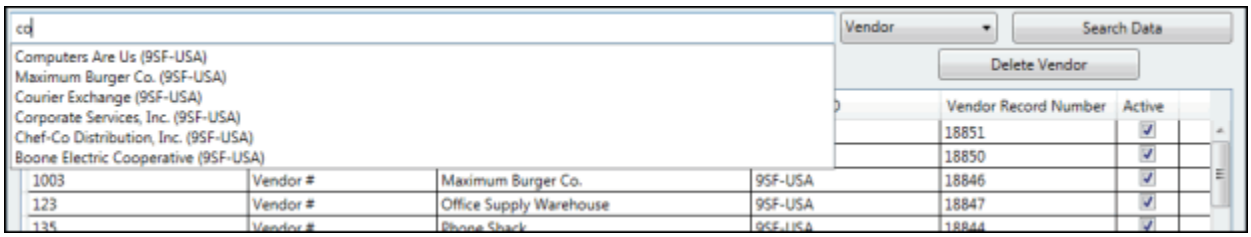
1. Within the **Data Capture Configuration** window, once you select **AP Vendor Data Administration Tool** and proceed (i.e., by clicking **Open**), the **AP Vendor Data Administration Tool** is opened.



Within this tool, you can add, modify, or delete data for individual vendors within the **Selected ERP System**. Existing vendor data is listed according to **Vendor Value** (i.e., the vendor name/number) in the Vendor Values table in the upper portion of the screen. When a vendor from this table is selected, different types of corresponding information are displayed in a table in the bottom portion of the screen, depending on which tab is selected.

- When the **Identifiers** tab is selected, the vendor identifiers that correspond to the selected vendor are listed in the Vendor Identifiers table in the bottom portion of the screen. For more information, see Modifying Vendor Identifiers on page 133.
- When the **Learned Data** tab is selected, the data that has been learned and stored by the Intelligent Capture for AP engine for the selected vendor and Document Type is listed in the Learned Data table in the bottom portion of the screen. For more information, see Deleting Learned Data on page 135.

2. Select the ERP system in the **Selected ERP System** drop-down list.
3. To quickly locate an existing vendor, select **Vendor** or **Identifier** from the drop-down list next to the search field at the top of the screen, depending on whether you want to search by a Vendor Value (the vendor name or vendor number) or by a vendor identifier value (such as a phone number or address).
   a. To search using a Vendor Value, begin typing the vendor name or vendor number into the text search field. As you type, matching values populate a drop-down list below the search field. The associated company ID (if available) is displayed in parenthesis after each Vendor Value in list.



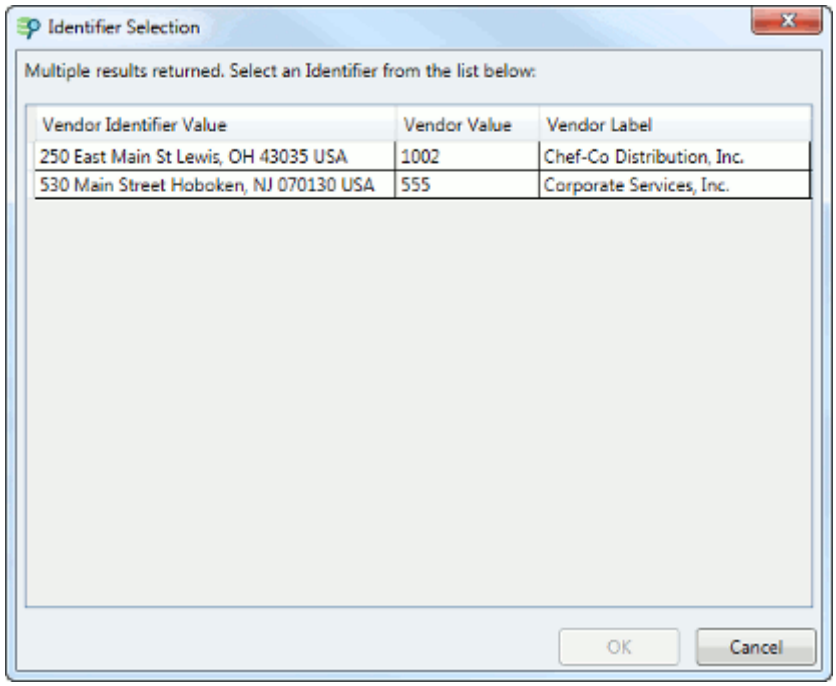
   You can navigate the list of potential values and initiate the search in the following ways:
   - Press **Esc** to close the drop-down list and clear data from the search field.
   - Click a value in the drop-down list to populate this value in the search field.
   - Press the up and down arrow keys to scroll through and individually highlight the values in the drop-down list.
   - Press **Tab** to populate the search field with the highlighted value from the drop-down list and move the focus out of the search field.
   - Press **Enter** to populate the search field with the highlighted value from the drop-down list and initiate the search. If only one value is showing in the drop-down list, you do not have to highlight this value before pressing **Enter** to initiate the search.
   - As an alternative to pressing **Enter**, you can click the **Search Data** button to initiate the search.

   Once you have initiated the search, matching results are highlighted on the screen.
   b. To search using an identifier, enter the identifier value into the text search field. You can use an asterisk wildcard character (*) to search a set of values.

You can interact with the search field and initiate the search in the following ways:

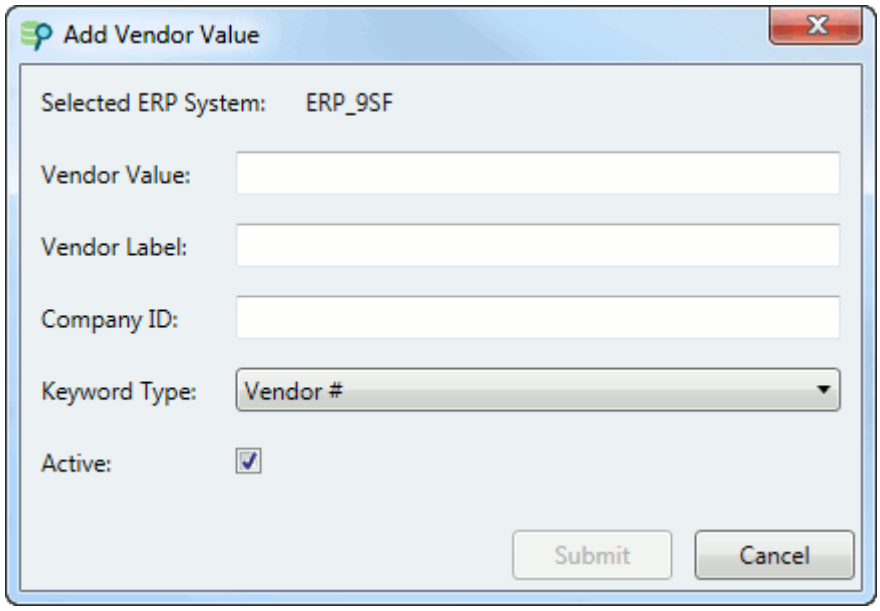
- Press **Esc** to clear data from the search field.
- Press **Enter** or click the **Search Data** button to initiate the search.

If the identifier search returns multiple results, the **Identifier Selection** dialog box is displayed.



Select the desired vendor data and click **OK**. The matching vendor record is highlighted on the main screen.

4. To add a new vendor, click **Add New Vendor**. The **Add Vendor Value** dialog box is displayed.

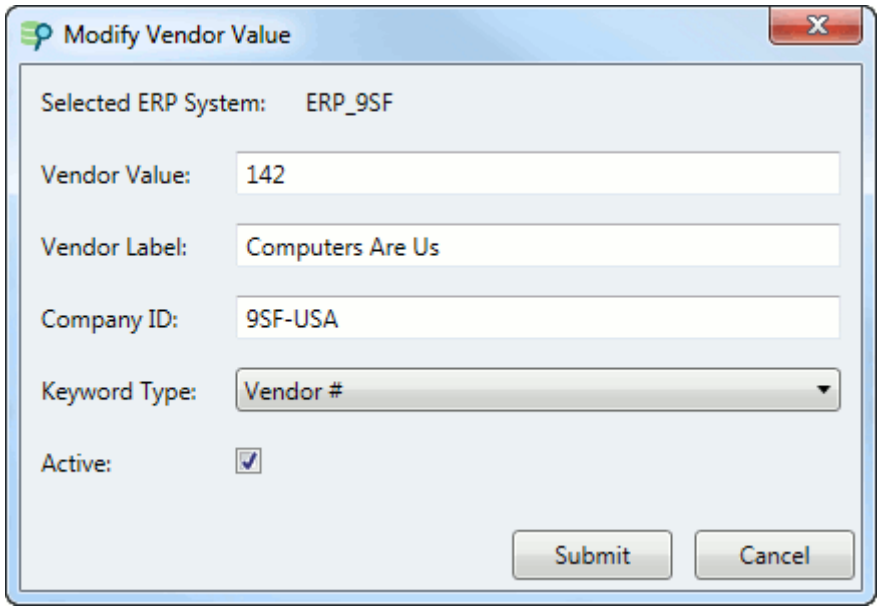


Enter a **Vendor Value** (i.e., the primary data item), **Vendor Label**, and **Company ID**, and use the drop-down list to select a **Keyword Type** to be associated with the vendor. This Keyword Type should match the primary data item type. Use the **Active** check box to indicate whether the status of the vendor is active or inactive.

Note: Only vendors with an **Active** status are included in the drop-down lists for Vendor Name and Vendor Number during index verification.

When finished, click **Submit** to add the new vendor to the Vendor Values table.

5. To modify an existing vendor, select its listing from the Vendor Values table and click **Modify Vendor** (or double-click the listing in the table). The **Modify Vendor Value** dialog box is displayed.

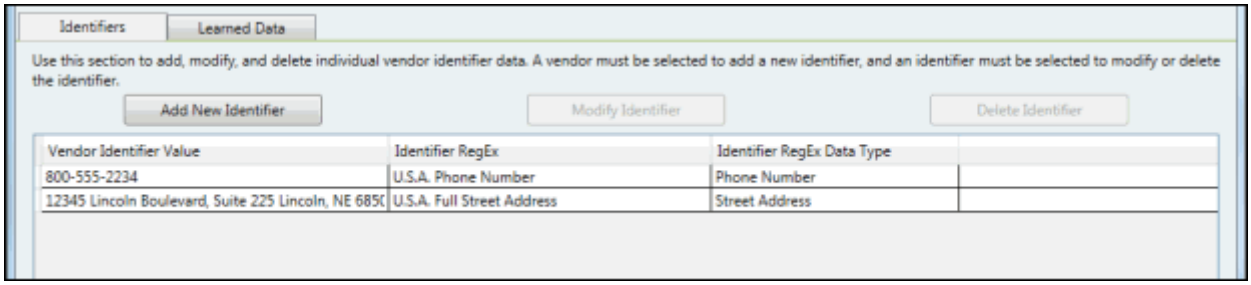


   Make the desired edits to the **Vendor Value**, **Vendor Label**, **Company ID**, **Keyword Type**, and **Active** check box. When finished, click **Submit**. The changes are reflected in the Vendor Values table.
6. To delete one or more vendors, select the listing(s) from the Vendor Values table. To select more than one listing, do one of the following:
   - Press **CTRL** and click multiple vendor listings.
   - Click a vendor listing and drag until all the vendors you wish to delete have been selected.
   - Click a vendor listing, press **Shift**, and use the arrow keys to select consecutive vendor listings above or below the vendor you originally selected.

   Then, click **Delete Vendors**. Any vendors that are deleted are removed from the Vendor Values table, and their corresponding identifier values are removed from the Vendor Identifiers table. Any learned data associated with the vendor(s) is also deleted.
7. To modify vendor identifiers or delete data that has been learned and stored by the Intelligent Capture for AP engine, select a vendor in the Vendor Values table and proceed to the appropriate section below.
8. Once you are finished adding, modifying, or deleting data for individual vendors, click **Close** to return to the **Data Capture Configuration** window.

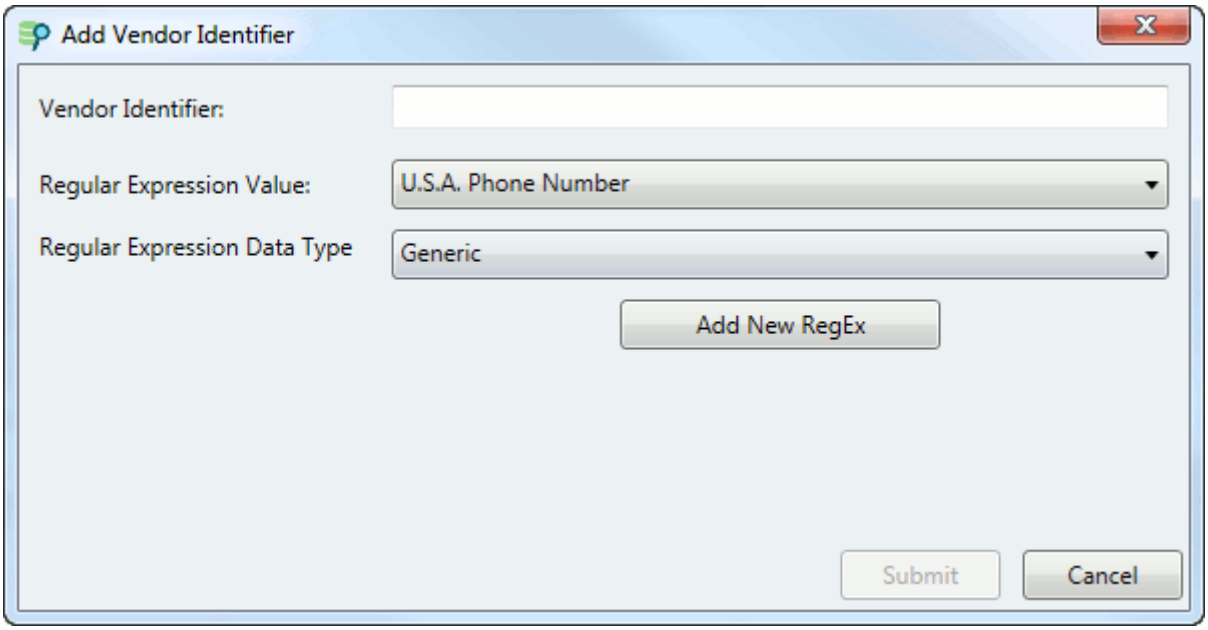
Modifying Vendor Identifiers

You can access existing vendor identifier data by selecting a vendor from the Vendor Values table and clicking the **Identifiers** tab to display the Vendor Identifiers table.



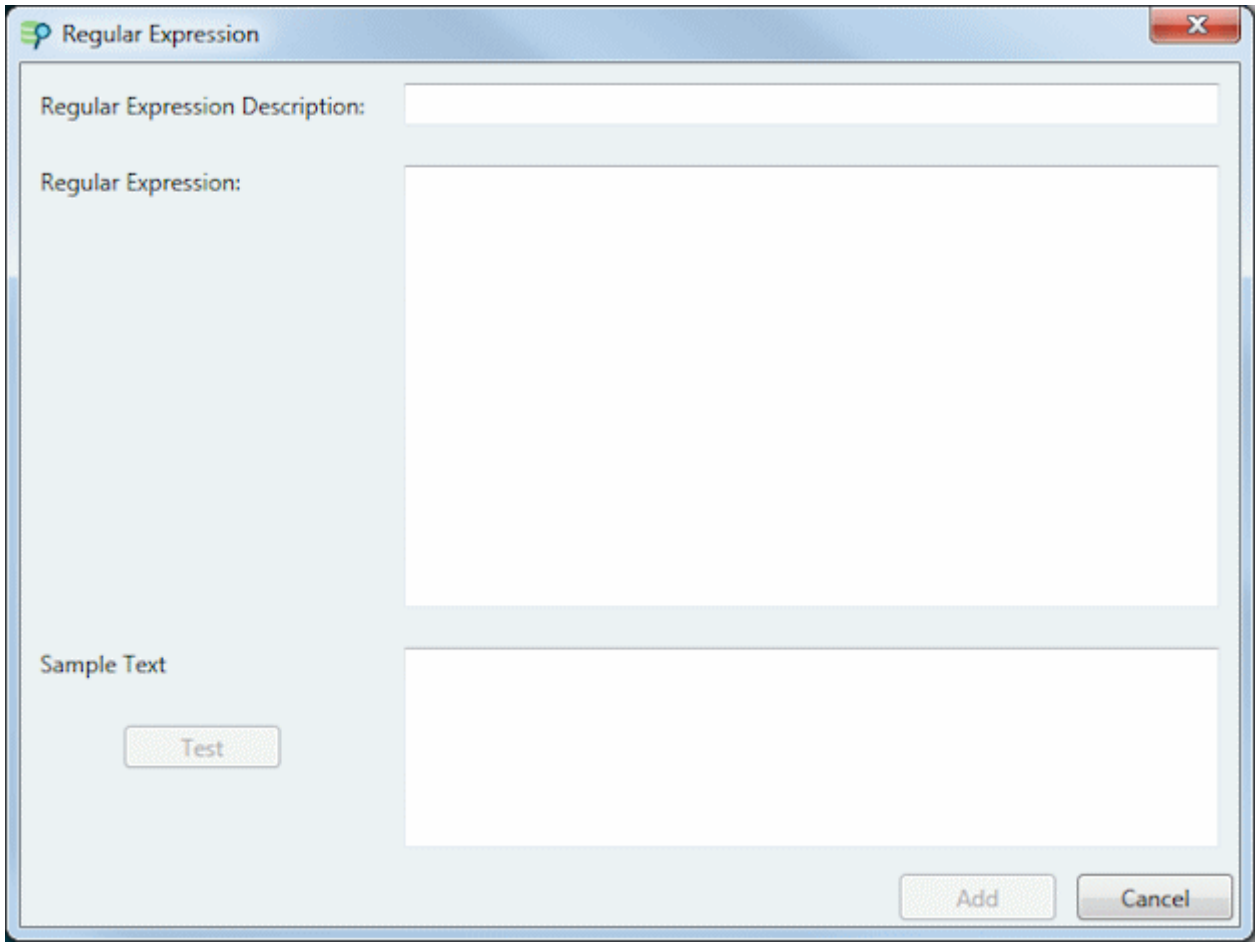
From here, you can add, modify, or delete individual vendor identifiers for use in your Intelligent Capture for AP solution:

1. To add a new vendor identifier value, select the corresponding vendor value from the Vendor Values table and click **Add New Identifier**. The **Add Vendor Identifier** dialog box is displayed.



   Enter a **Vendor Identifier** value and select a **Regular Expression Value** and a **Regular Expression Data Type** to associate with the identifier.

- If you want to add a regular expression to the standard regular expressions supplied in the drop-down list, click **Add New RegEx**. The **Add Regular Expression** dialog box is displayed.

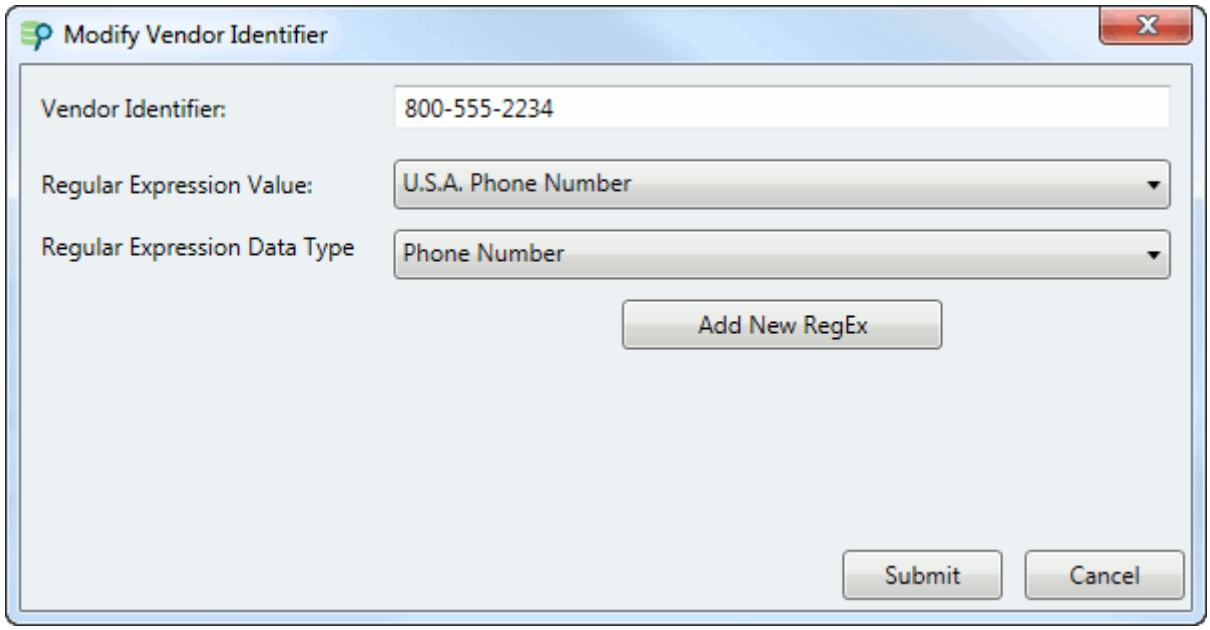


Enter a description and the regular expression itself in the appropriate fields, and then enter a sample expression in the **Sample Text** field. Click **Test** to determine if your sample matches the form of your regular expression. Once the test is successful, click **Add** to add the new regular expression to the drop-down list.

Note: Only valid regular expressions can be added. If you attempt to add an invalid regular expression, an error message is displayed.

When finished, click **Submit** to add the new vendor identifier to the Vendor Identifiers table.

2. To modify an existing vendor identifier, select its listing from the Vendor Identifiers table and click **Modify Identifier** (or double-click the listing in the table). The **Modify Vendor Identifier** dialog box is displayed.

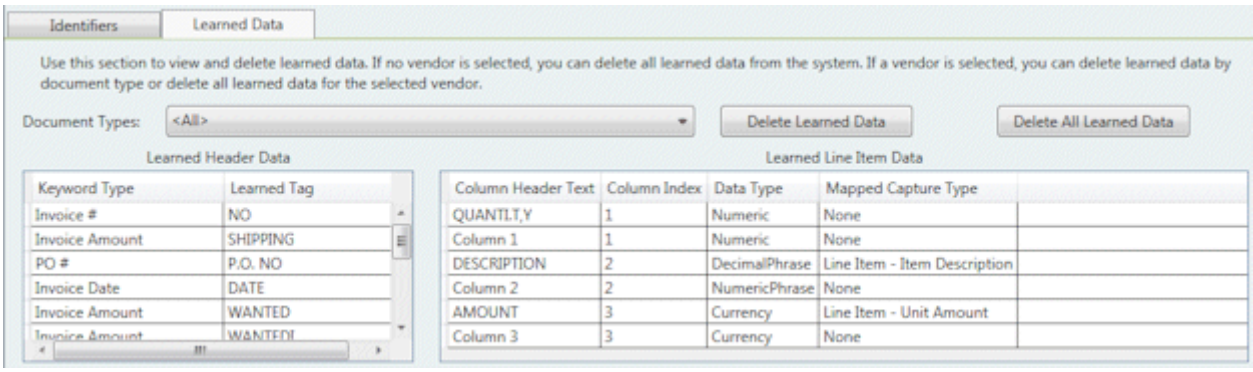


   Make the desired edits to the **Vendor Identifier**, **Regular Expression Value**, and **Regular Expression Data Type**. When finished, click **Submit**. The changes are reflected in the Vendor Identifiers table.

3. To delete a vendor identifier, select its listing from the Vendor Identifiers table and click **Delete Identifier**. The identifier's listing is removed from the Vendor Identifiers table.

Deleting Learned Data

You can delete data that has been learned and stored by the Intelligent Capture for AP engine by selecting a vendor from the Vendor Values table and clicking the **Learned Data** tab to display the two Learned Data tables: **Learned Header Data** and **Learned Line Item Data**.



From here, you can delete learned data (i.e., header and/or line item data) by vendor or Document Type, or you can delete all learned data for the currently selected ERP system:

1. To delete the data that has been learned and stored for a specific Document Type of a specific vendor, from the **Document Types** drop-down list, select the desired Document Type and click **Delete Learned Data**. You are prompted to confirm the deletion.
2. To delete the data that has been learned and stored for all Document Types of a specific vendor, from the **Document Types** drop-down list, select **<All>** and click **Delete Learned Data**. You are prompted to confirm the deletion.
3. To delete all data that has been learned and stored for the currently selected ERP system, click **Delete All Learned Data**. You are prompted for your password to confirm the deletion.

Note: You can delete all learned data for the selected ERP system without selecting a vendor from the Vendor Values table or viewing the **Learned Header Data** and **Learned Line Item Data** tables.

Importing/Exporting Vendor Data Across Different Systems

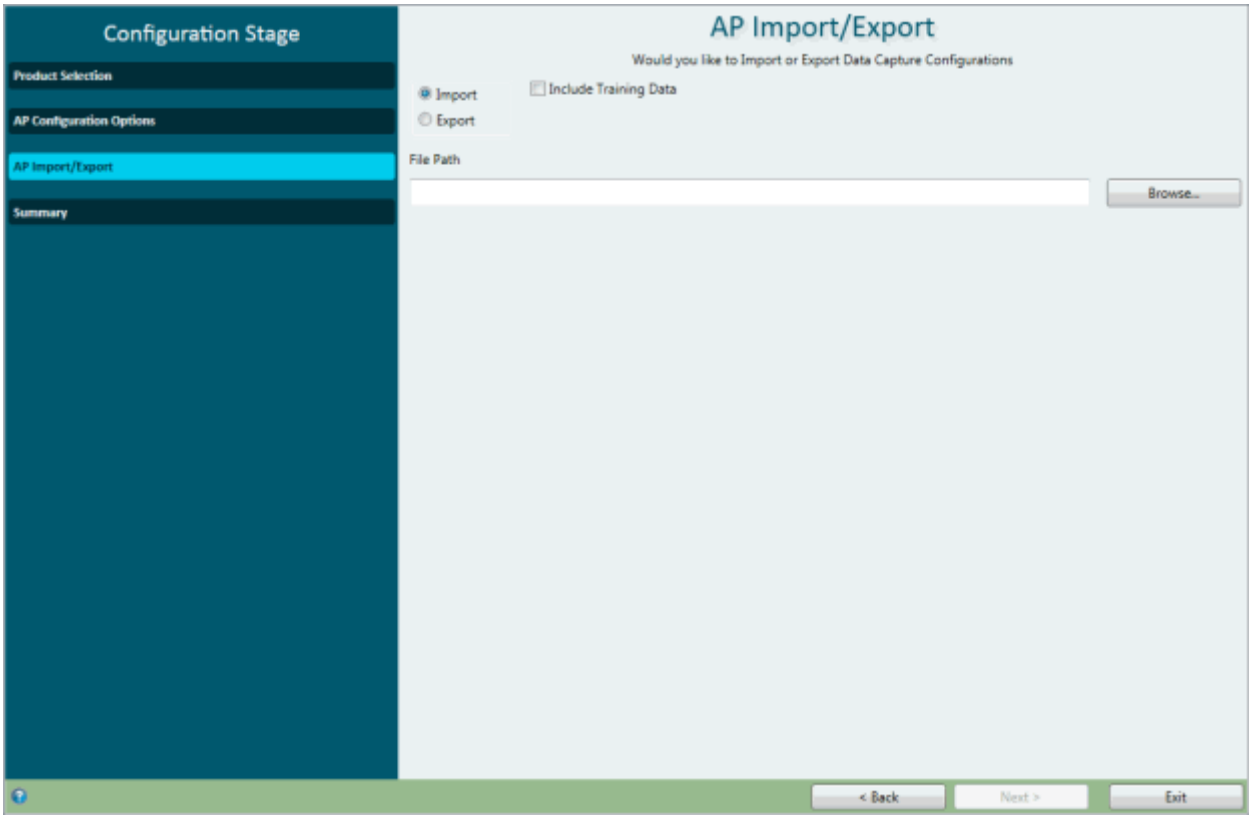
Intelligent Capture for AP configuration settings and/or learned data can be imported into/exported from your system. This allows you to share data you have created with another Intelligent Capture for AP solution, or vice versa. The ability to import/export vendor data can be especially useful when exporting data from a test system and then importing it into a production system, for instance. The import/export process can reduce or eliminate the need for an administrator to repeat numerous configuration steps or to reproduce the same learned data.

Caution: Do not attempt to use the import/export process to copy vendor data between ERP systems within the same Intelligent Capture for AP solution. Doing so may result in vendor data loss.

Once exported, the Intelligent Capture for AP data is saved as XML files for easy transmittal.

To begin the import/export process:

1. Within the **Data Capture Configuration** window, once you select **Import/Export** and proceed, the **AP Import/Export** screen is displayed.



2. Do one of the following:
   - If you want to import vendor data into your Intelligent Capture for AP system, select **Import** and browse to the appropriate XML file.
   - If you want to export vendor data from your Intelligent Capture for AP system into an XML file, select **Export**, browse to the location where the XML file will be placed, and name the XML file.
3. If you want to include learned data from training in the import/export, select **Include Training Data**.

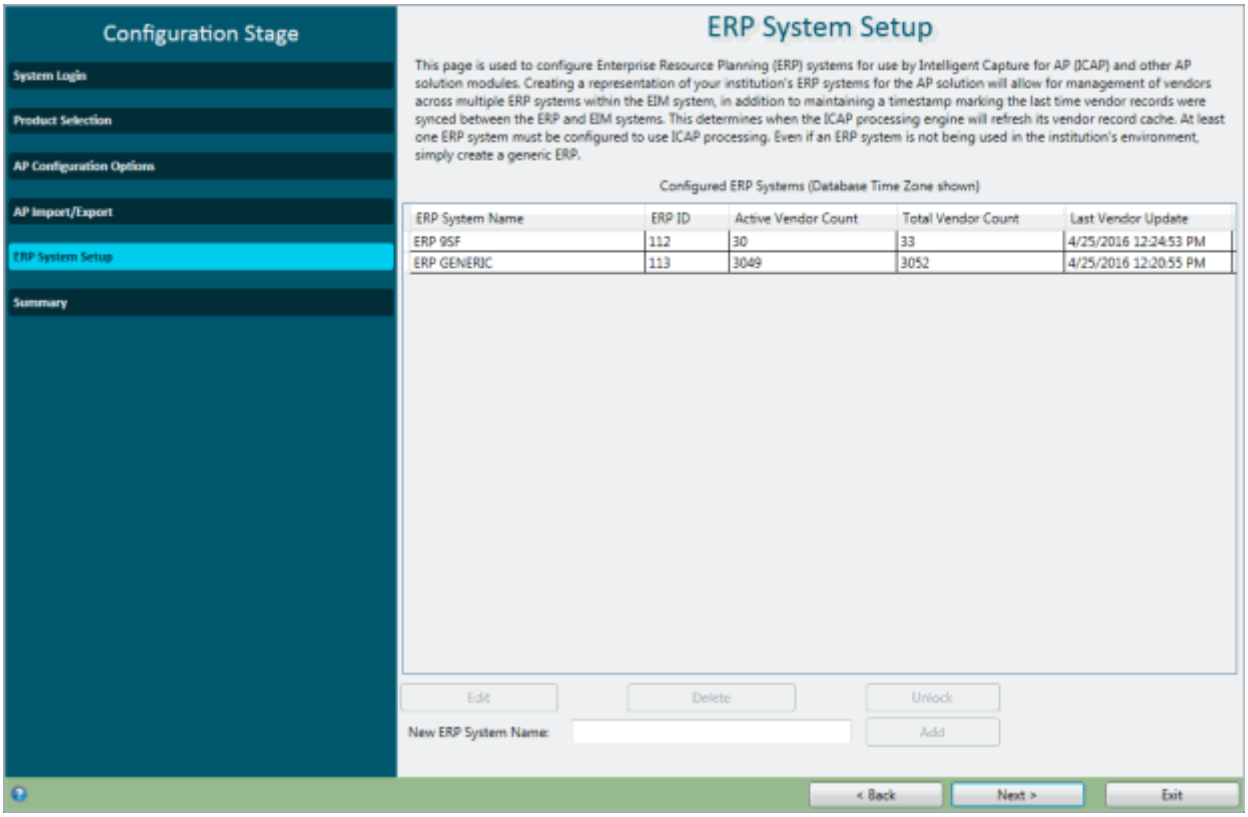
Tip: Selecting **Include Training Data** can reduce the amount of learning required during the ICAP process. If you do not select this option, learned data is omitted from the XML file and invoices processed in a production system, for instance, must re-learn data during the ICAP process.

4. Once your options are set, click **Next >**. Then, depending on your selected process, follow the procedures in the appropriate section below:
   - If you are performing an import process, see Importing Vendor Data into a System on page 138.
   - If you are performing an export process, see Exporting Vendor Data From a System on page 150.

Importing Vendor Data into a System

To configure the options specific to an import process:

1. Once you select **Import** from the **AP Import/Export** screen and proceed, the **ERP System Setup** screen is displayed.

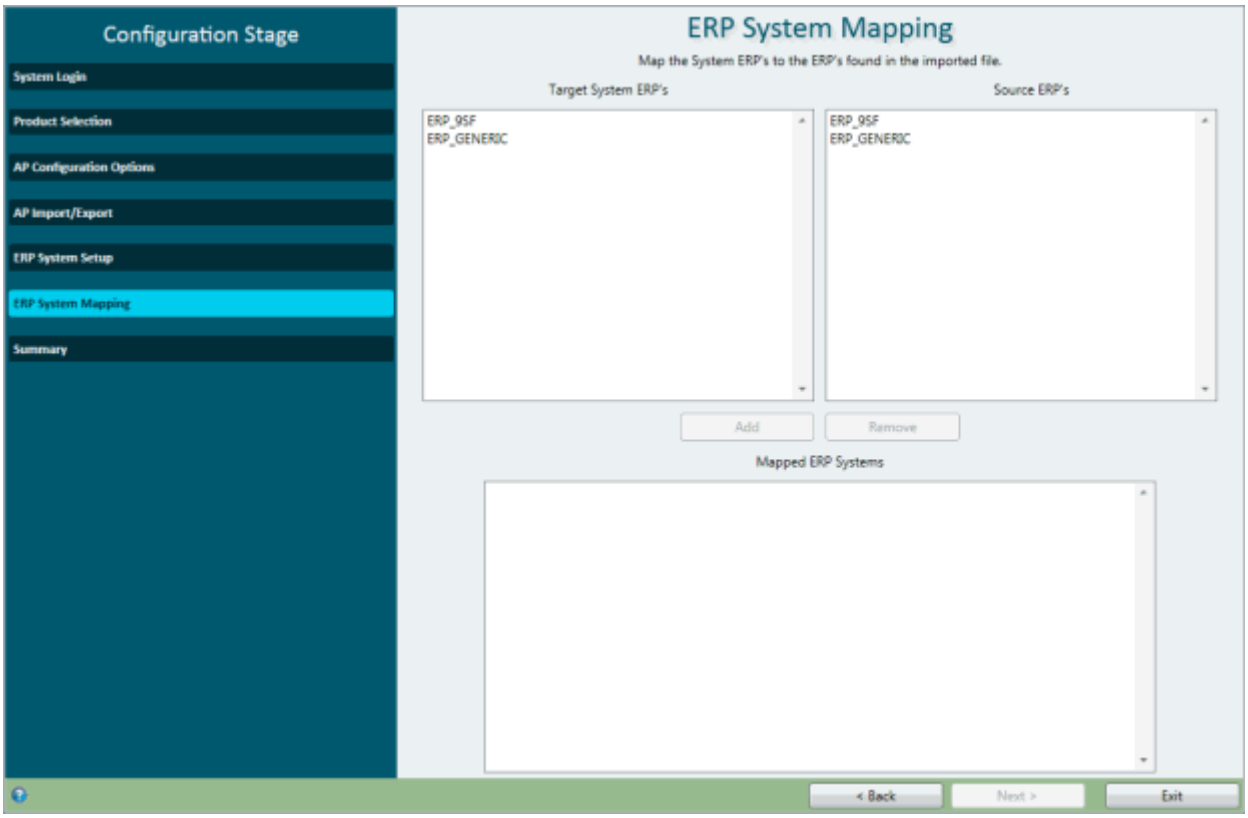


Note: The date and time in the **Last Vendor Update** column is based on the time and time zone of the OnBase database.

2. Confirm the **Configured ERP Systems** list to ensure that you have ERP systems into which you can import vendor data. At least one ERP system is required. You can add, modify, or delete ERP systems if needed.
   a. To add a new ERP system, type the name of the ERP system in **New ERP System Name** and click **Add**. The ERP system is added to the **Configured ERP Systems** list.
   b. To modify previously configured ERP systems, select the ERP system in the **Configured ERP Systems** list and perform one of the following:
      - Click **Edit** to rename the ERP system. The **Edit ERP System** dialog box is displayed, allowing you to type a new name and click **Submit**.
      - Click **Delete** the delete the ERP system. This action deletes all vendor data associated with the ERP system, as well as all scan queue mappings, Document Type mappings, and Keyword Type mappings associated with the ERP system. The user's password is required to confirm the deletion.

Caution: The **Unlock** button should only be used if a pre-existing ERP system has become locked due to an unexpected issue. Unlocking an ERP system during an active vendor data update could result in data conflicts for the Intelligent Capture for AP engine. For more information, see Troubleshooting on page 15 or contact your first line of support.

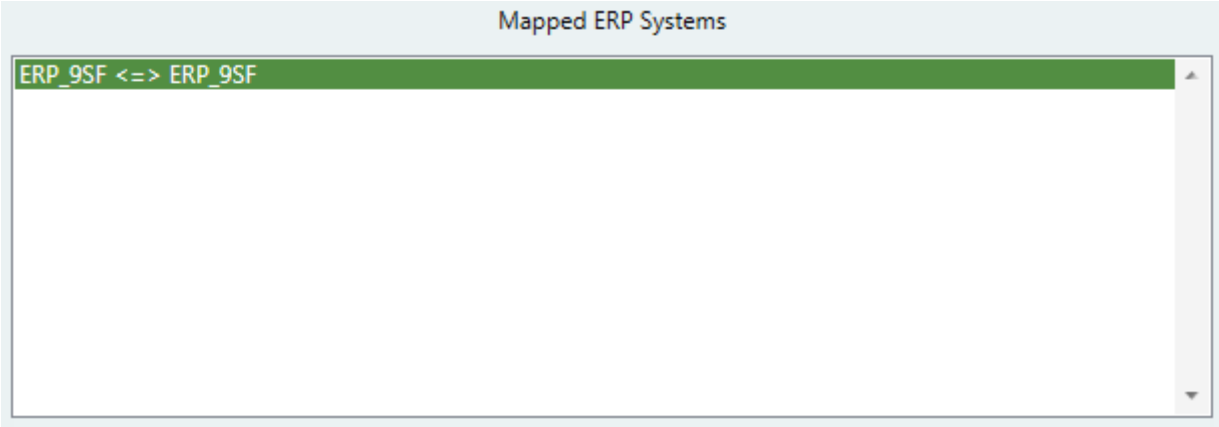
3. Click **Next >**. The **ERP System Mapping** screen is displayed.



On this screen, you must map the ERP systems that exist within your OnBase system (the target ERP systems) to the ERP systems being imported from the import XML file (the source ERP systems).

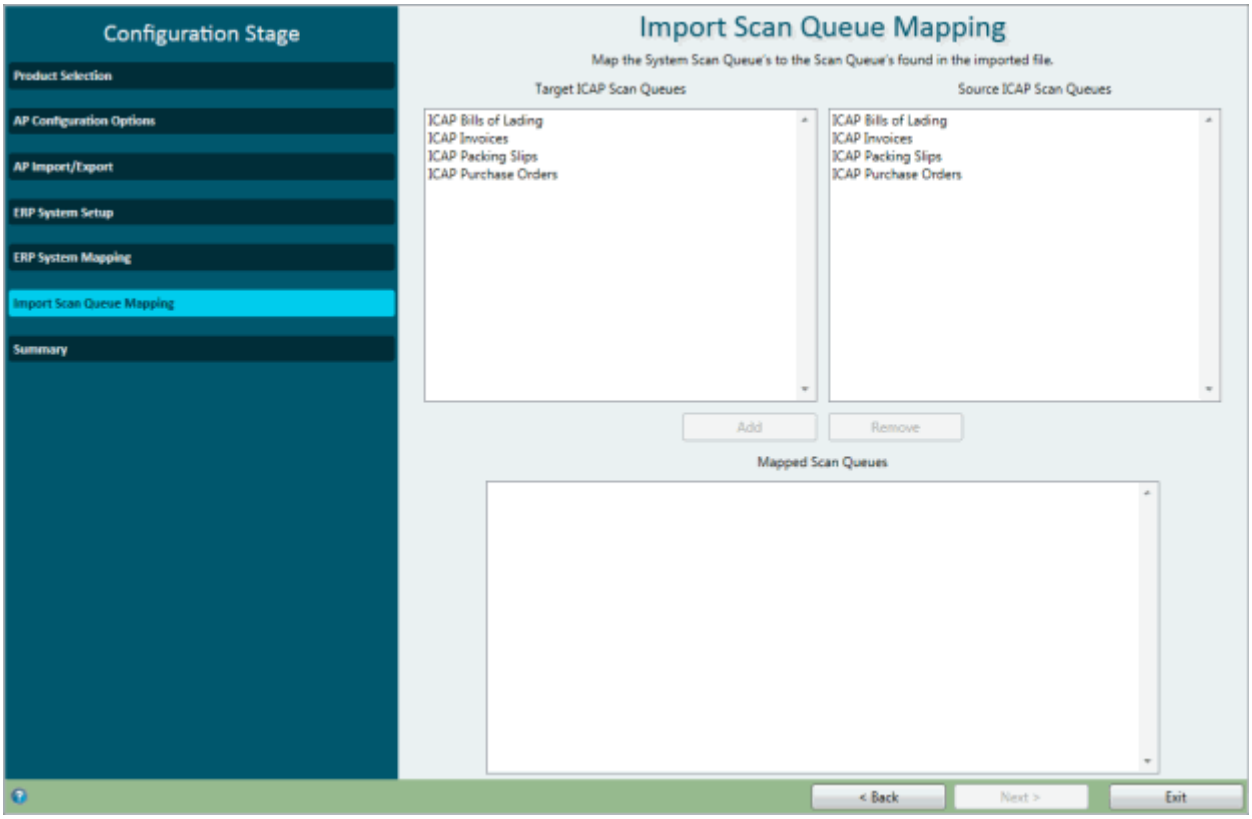
4. To add a new mapped import ERP system pair:
   a. From the **Target System ERP's** list, select an ERP system.
   b. From the **Source ERP's** list, select the import ERP system you want to map to the target ERP system.

c. Click **Add**. The mapped pair is added to the **Mapped ERP Systems** list.



5. To remove a mapped import ERP systems pair:
   a. From the **Mapped ERP Systems** list, select the mapped pair you want to remove.
   b. Click **Remove**. The mapped pair is removed from the **Mapped ERP Systems** list, and the target ERP system and import source ERP system from the pair are added back to the **Target System ERP's** and **Source ERP's** lists, respectively.

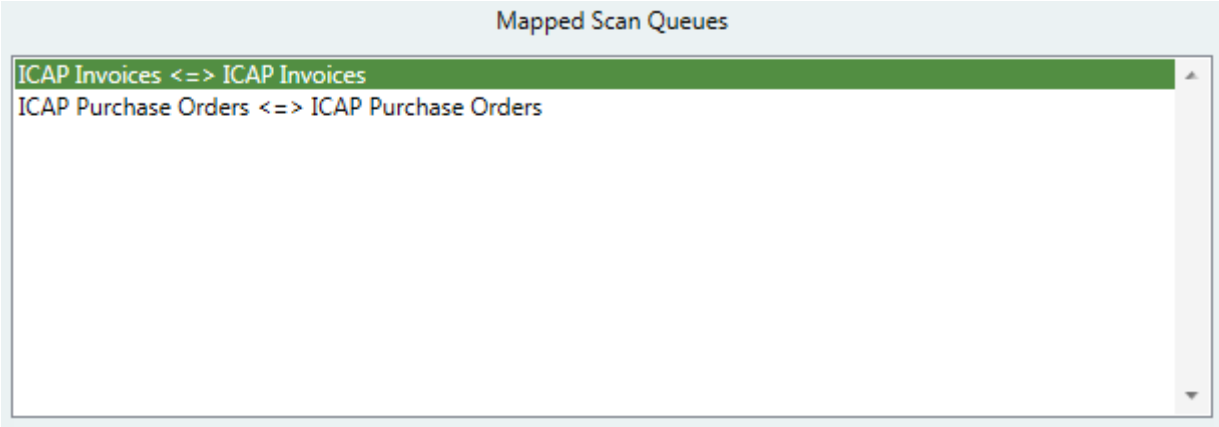
6. When finished mapping import ERP systems, click **Next >**. The **Import Scan Queue Mapping** screen is displayed.



On this screen, you must map the scan queues that exist within your OnBase system (the target ICAP scan queues) to the scan queues being imported from the import XML file (the source scan queues).

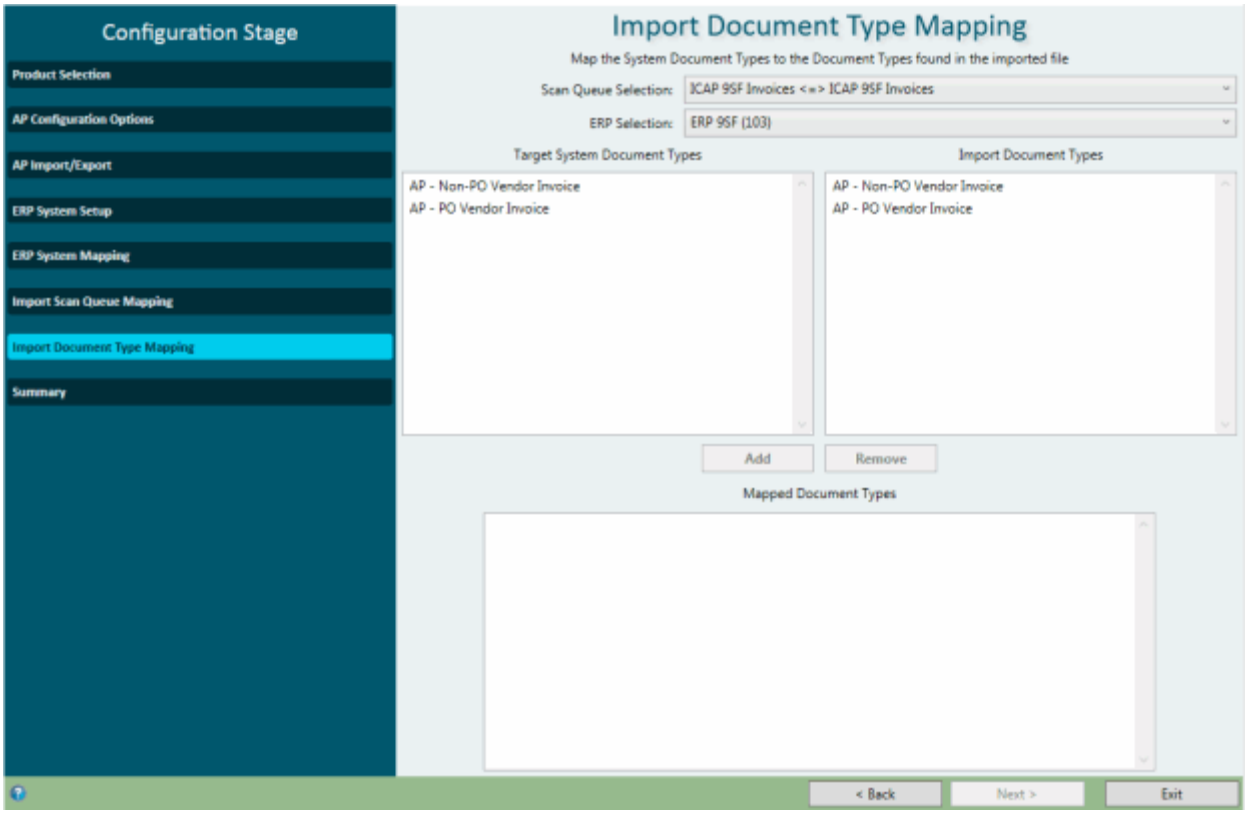
7. To add a new mapped import scan queues pair:
   a. From the **Target ICAP Scan Queues** list, select a scan queue.
   b. From the **Source ICAP Scan Queues** list, select the scan queue you want to map to the scan queue.

c. Click **Add**. The mapped pair is added to the **Mapped Scan Queues** list.



8. To remove a mapped import scan queues pair:
   a. From the **Mapped Scan Queues** list, select the mapped pair you want to remove.
   b. Click **Remove**. The mapped pair is removed from the **Mapped Scan Queues** list, and the target scan queue and import source scan queue from the pair are added back to the **Target ICAP Scan Queues** and **Source ICAP Scan Queues** lists, respectively.

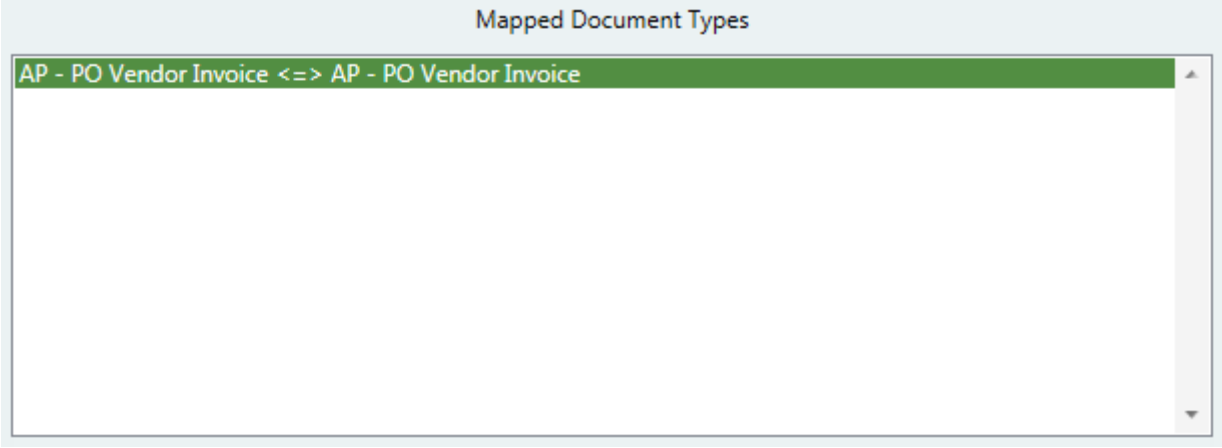
9. When finished mapping import scan queues, click **Next >**. The **Import Document Type Mapping** screen is displayed.



On this screen, you must map the Document Types being imported to Document Types that exist within your OnBase system.

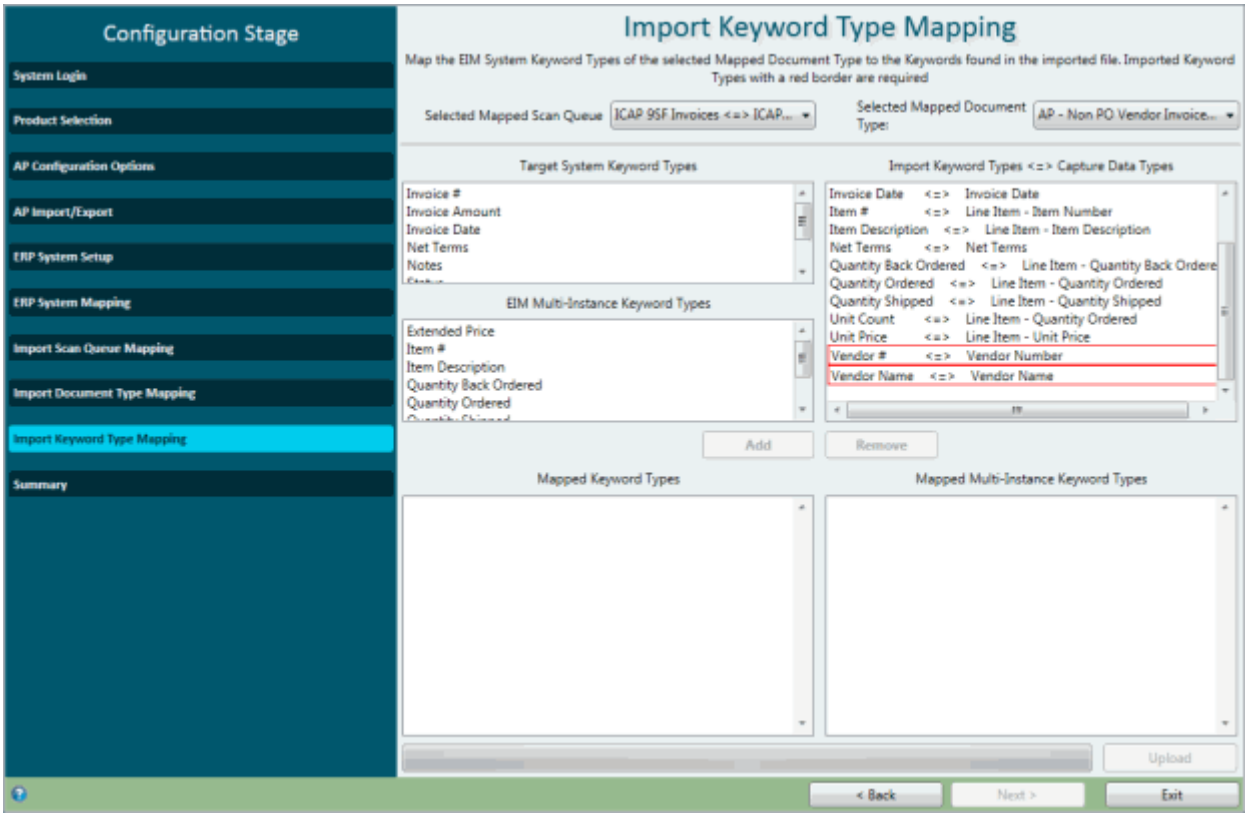
10. To add a new mapped import Document Type pair:
    a. From the **Scan Queue Selection** drop-down list, select the scan queue configured for the Document Type you want to map.
    b. From the **ERP Selection** drop-down list, select the ERP system containing vendor identification data for the selected scan queue.
    c. From the **Target System Document Types** list, select an OnBase Document Type.
    d. From the **Import Document Types** list, select the import Document Type you want to map to the OnBase Document Type.

e. Click **Add**. The mapped pair is added to the **Mapped Document Types** list.



11. To remove a mapped import Document Type pair:
    a. From the **Mapped Document Types** list, select the mapped pair you want to remove.
    b. Click **Remove**. The mapped pair is removed from the **Mapped Document Types** list, and the OnBase Document Type and import Document Type from the pair are added back to the **Target System Document Types** and **Import Document Type** lists, respectively.

12. When finished mapping import Document Types, click **Next >**. The **Import Keyword Type Mapping** screen is displayed.



On this screen, for each mapped import Document Type pair, you must map the Keyword Types being imported to Keyword Types that exist within your OnBase system.

13. From the **Selected Mapped Scan Queue** drop-down list, select the mapped scan queue configured for the Document Type pair and Keyword Types you want to map.
14. From the **Selected Mapped Document Type** drop-down list, select the mapped import Document Type pair for which you want to map import Keyword Types. Single-instance and multi-instance Keyword Types that have been configured for the OnBase Document Type in the selected Document Type pair are displayed in the **Target System Keyword Types** and **EIM Multi-Instance Keyword Types** lists, respectively.

Tip: You can map OnBase multi-instance Keyword Types to the corresponding import Keyword Types to assist in line item extraction during ICAP processing. To add a new multi-instance Keyword Type pair, proceed to step 16.

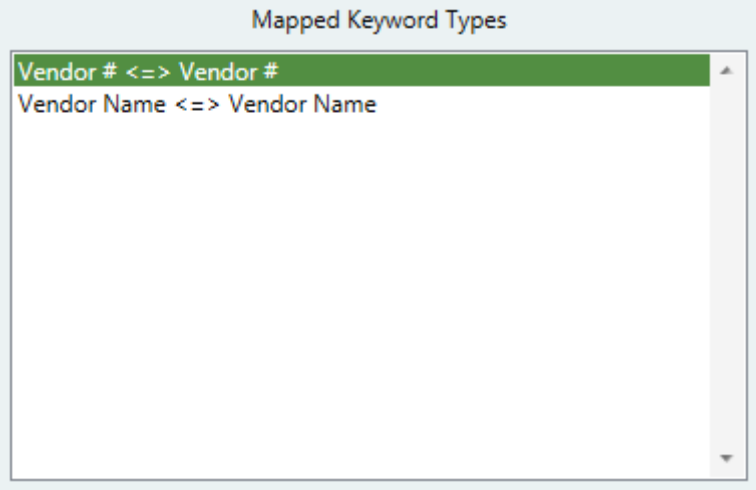
15. To add a new mapped, single-instance, import Keyword Type pair:
    a. From the **Target System Keyword Types** list, select an OnBase single-instance Keyword Type.
    b. From the **Import Keyword Types <==> Capture Data Types** list, select the import Keyword Type/Capture Data Type pair you want to map to the OnBase single-instance Keyword Type.

Note: While the import Keyword Types are automatically mapped to the pre-configured Capture Data Types, you must manually map these newly imported Keyword Types to the appropriate Keyword Types that already exist within your OnBase system.

Note: At a minimum, you must map the **Vendor Name** and **Vendor Number** import Keyword Type/Capture Data Type pairs to the appropriate Keyword Types that exist within your OnBase system. These pairs are highlighted in red in the **Import Keyword Types <==> Capture Data Types** list, and they must be mapped before you can proceed.

    c. Click **Add**. The mapped single-instance pair is added to the **Mapped Keyword Types** list.

Note: Although the pre-configured Capture Data Type is included in the mapping selection, it is omitted from the **Mapped Keyword Types** list (i.e., only the OnBase single-instance Keyword Type and the import Keyword Type are reflected in the newly mapped pair).



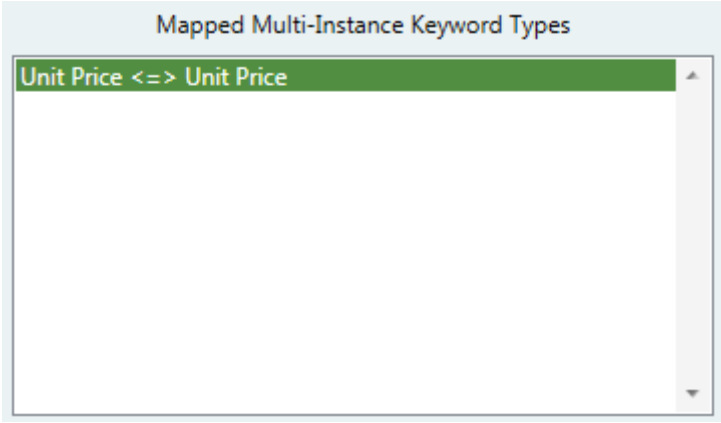
16. To add a new mapped, multi-instance, import Keyword Type pair:
    a. From the **EIM Multi-Instance Keyword Types** list, select an OnBase multi-instance Keyword Type.
    b. From the **Import Keyword Types <==> Capture Data Types** list, select the import Keyword Type/Capture Data Type pair you want to map to the OnBase multi-instance Keyword Type.

Note: While the import Keyword Types are automatically mapped to the pre-configured Capture Data Types, you must manually map these newly imported Keyword Types to the appropriate Keyword Types that already exist within your OnBase system.

Note: At a minimum, you must map the **Vendor Name** and **Vendor Number** import Keyword Type/Capture Data Type pairs to the appropriate Keyword Types that exist within your OnBase system. These pairs are highlighted in red in the **Import Keyword Types <==> Capture Data Types** list, and they must be mapped before you can proceed.

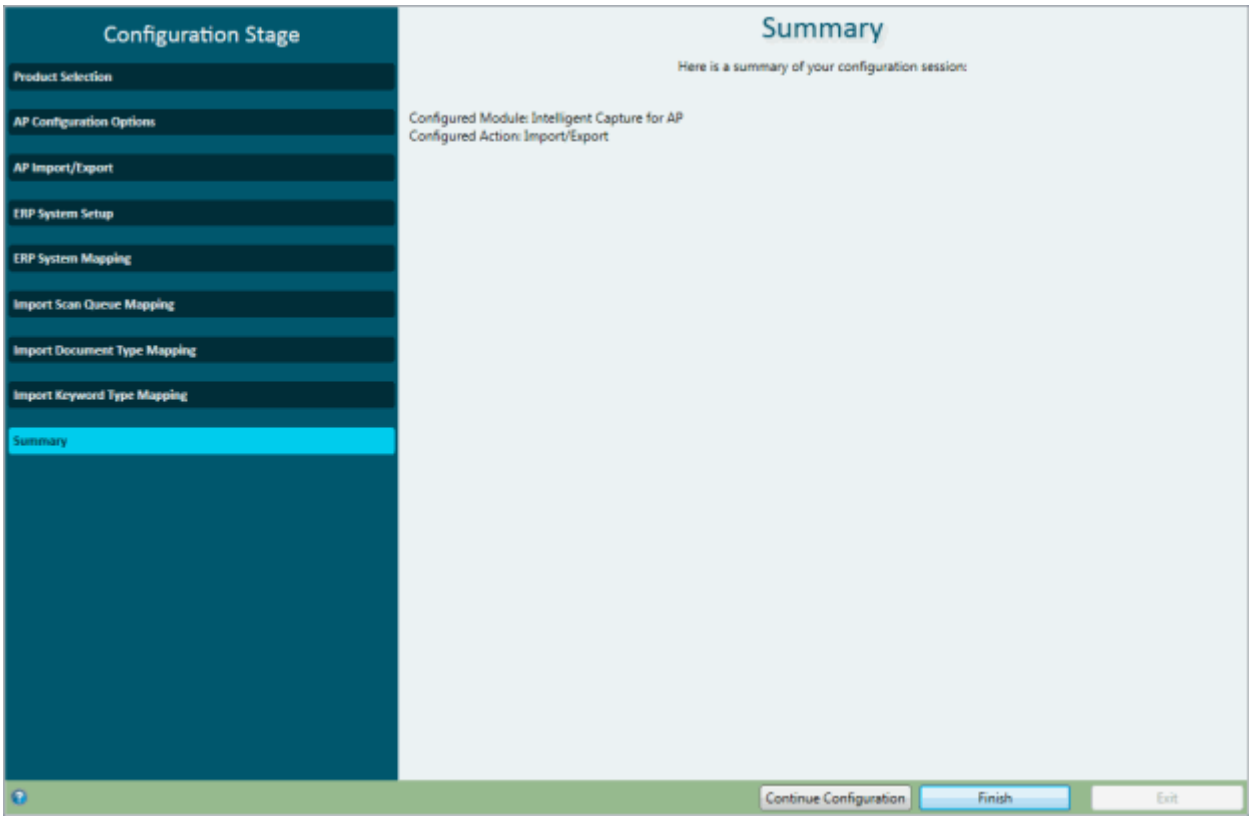
    c. Click **Add**. The mapped multi-instance pair is added to the **Mapped Multi-Instance Keyword Types** list.

Note: Although the pre-configured Capture Data Type is included in the mapping selection, it is omitted from the **Mapped Multi-Instance Keyword Types** list (i.e., only the OnBase multi-instance Keyword Type and the import Keyword Type are reflected in the newly mapped pair).



17. To remove a mapped import Keyword Type pair:
    a. From either the **Mapped Keyword Types** or the **Mapped Multi-Instance Keyword Types** list, select the mapped pair you want to remove.
    b. Click **Remove**. The mapped pair is removed from either the **Mapped Keyword Types** or the **Mapped Multi-Instance Keyword Types** list, and the OnBase Keyword Type and import Keyword Type from the pair are added back to the **Target System Keyword Types** / **EIM Multi-Instance Keyword Types** list and the **Import Keyword Types <==> Capture Data Types** list, respectively.
18. When finished mapping import Keyword Types, click **Upload**.

19. Once the upload is complete, click **Next >**. The **Summary** screen is displayed.



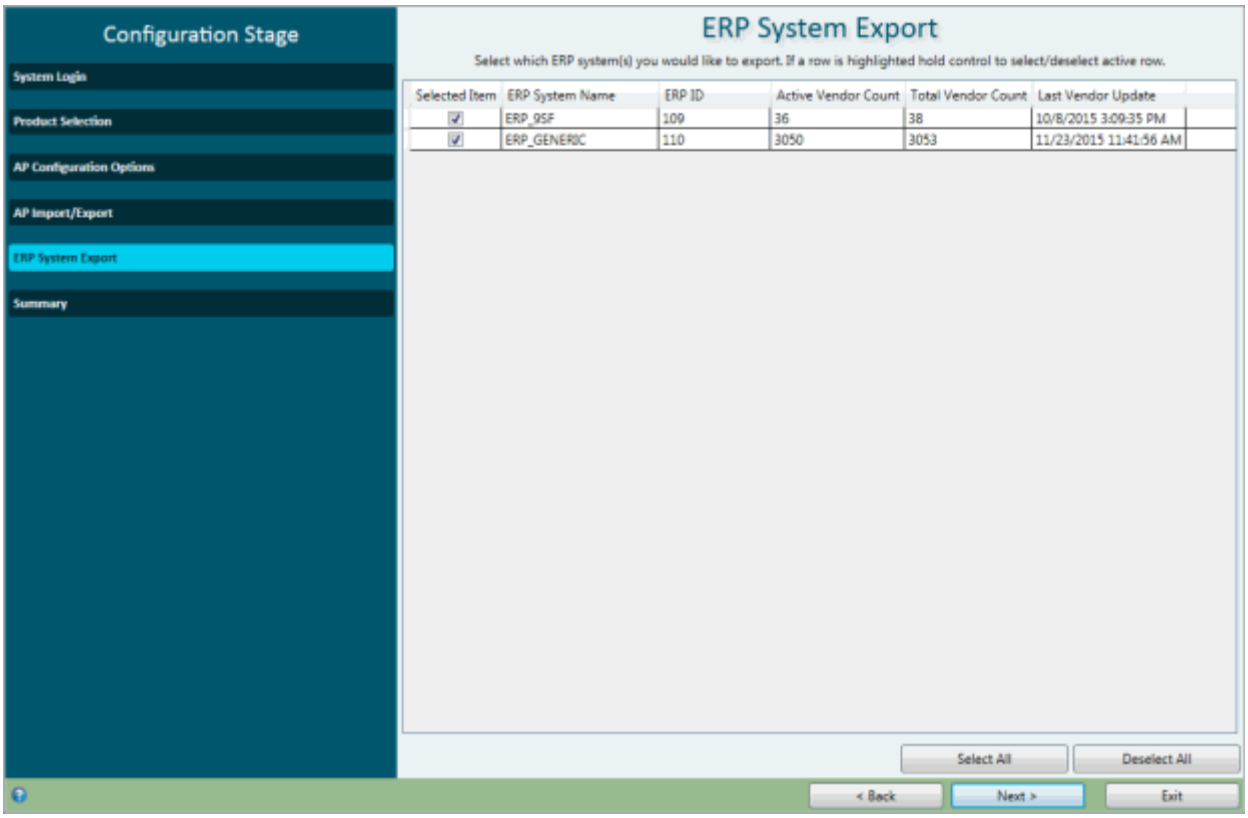
A brief summary of your configuration settings is listed. Once you are finished reviewing the summary, do one of the following:

- To save your configuration changes and return to the **Product Selection** screen, click **Continue Configuration**.
- To save your configuration changes and close the **Data Capture Configuration** window, click **Finish**.

Exporting Vendor Data From a System

To configure the options specific to an export process:

1. Once you select **Export** from the **AP Import/Export** screen and proceed, the **ERP System Export** screen is displayed. This screen allows you to select the ERP systems from which to export vendor data.

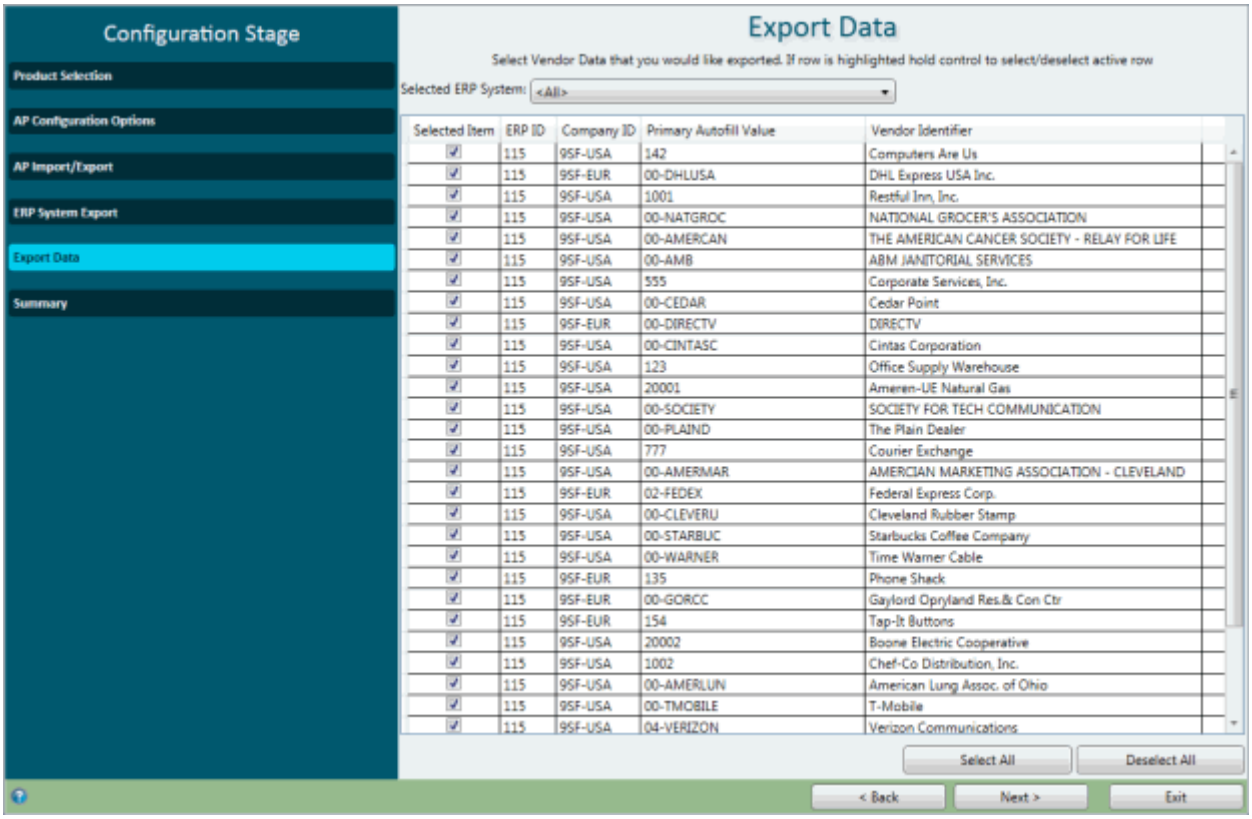


Note: The date and time in the **Last Vendor Update** column is based on the time and time zone of the OnBase database.

2. Select the **Selected Item** check box for each ERP system you want to export. You can also use the **Select All** and **Deselect All** buttons to select or deselect all of the listed ERP systems.

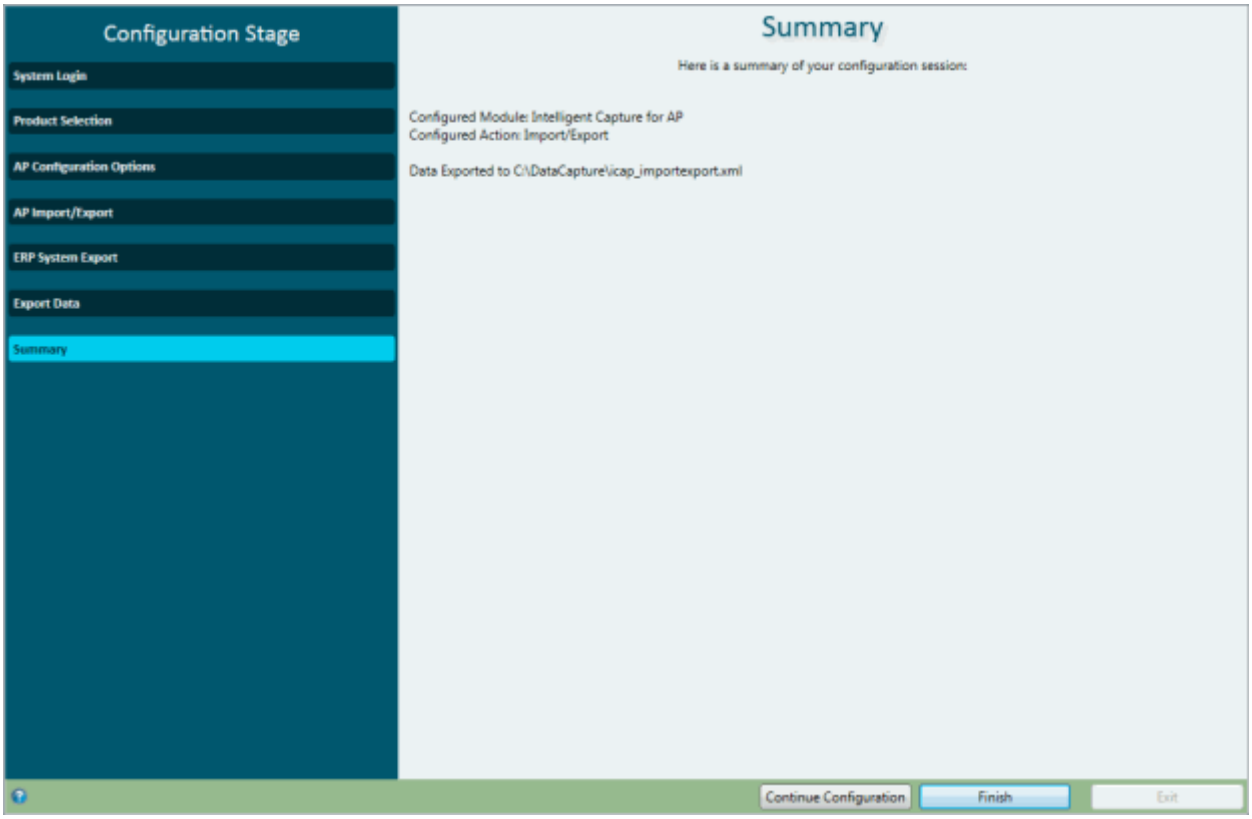
Tip: When you click within any column of a particular row, the entire row is selected. If you want to select or deselect the **Selected Item** check box within an already selected row, you must press and hold **CTRL** and then click the **Selected Item** check box.

3. Click **Next**. The **Export Data** screen is displayed. This screen allows you to select individually the vendor data records to export.



4. Use the **Selected ERP System** drop-down list to change which ERP system's vendor data is displayed in the vendor listing table. Select **<All>** to display vendor data from all of the ERP systems selected to export.
5. In the table, select the vendor data you want to export by selecting the appropriate check boxes in the **Selected Item** column next to the vendors' listings. You can also use the **Select All** or **Deselect All** buttons to select or deselect all of the vendors in the table.

6. Once you are finished making your selections, click **Next**. The **Summary** screen is displayed.



A brief summary of your configuration settings is listed. Once you are finished reviewing the summary, do one of the following:

- To save your configuration changes and return to the **Product Selection** screen, click **Continue Configuration**.
- To save your configuration changes and close the **Data Capture Configuration** window, click **Finish**.

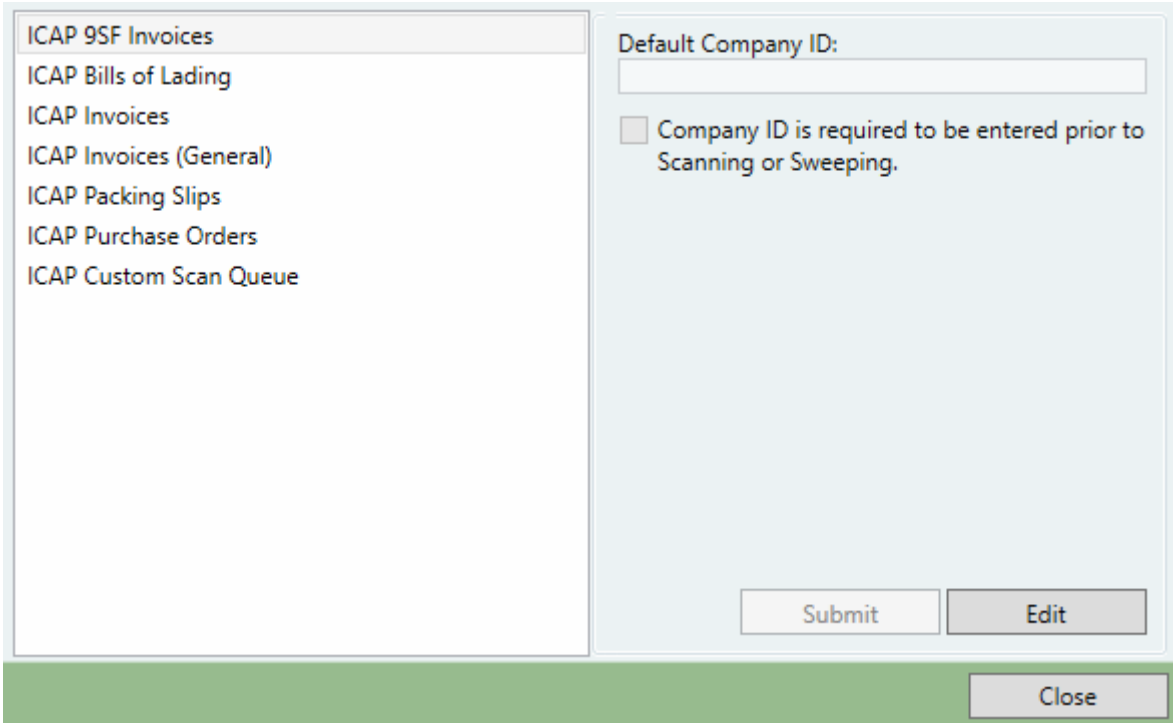
Managing Scan Queues

You can modify ICAP-specific settings for a scan queue using the **Scan Queue Management Tool**.

Note: These settings are only respected when your scan mode has been set to **Pre-Index** or **Full Index**.

To modify the settings of an Intelligent Capture for AP scan queue using the **Scan Queue Management Tool**:

1. Within the **Data Capture Configuration** window, once you select **Scan Queue Management Tool** and proceed (i.e., by clicking **Open**), the **Scan Queue Management Tool** is opened.



   Within this tool, you can modify several settings for each Intelligent Capture for AP scan queue. Existing Intelligent Capture for AP scan queues are listed on the left portion of the screen.
2. Select the scan queue that you would like to configure. The settings that are specific to that scan queue are displayed on the right portion of the screen.

Note: The settings displayed in the **Scan Queue Management Tool** do not represent all the configurable settings available for a scan queue. For complete information on configuring scan queues, see the **Document Imaging** module reference guide.

3. Click **Edit**.
   - To assign a default company ID to the scan queue, enter the company ID value into the **Default Company ID** field. That company ID will be applied to any documents imported using this scan queue.

Note: If the value entered into the **Default Company ID** field exceeds the maximum length of the corresponding Keyword Type, the corresponding Keyword Value will be truncated to fit this length.

- To require a company ID to be entered prior to scanning or sweeping the batch, select **Company ID is required to be entered prior to Scanning or Sweeping**.
- To limit learning to vendors for which learned data does not already exists, select **Limit learning to only vendors without learned data**. For more information about viewing and modifying vendor data, see Modifying Vendor Data on page 128.

4. Click **Submit** to save your changes.

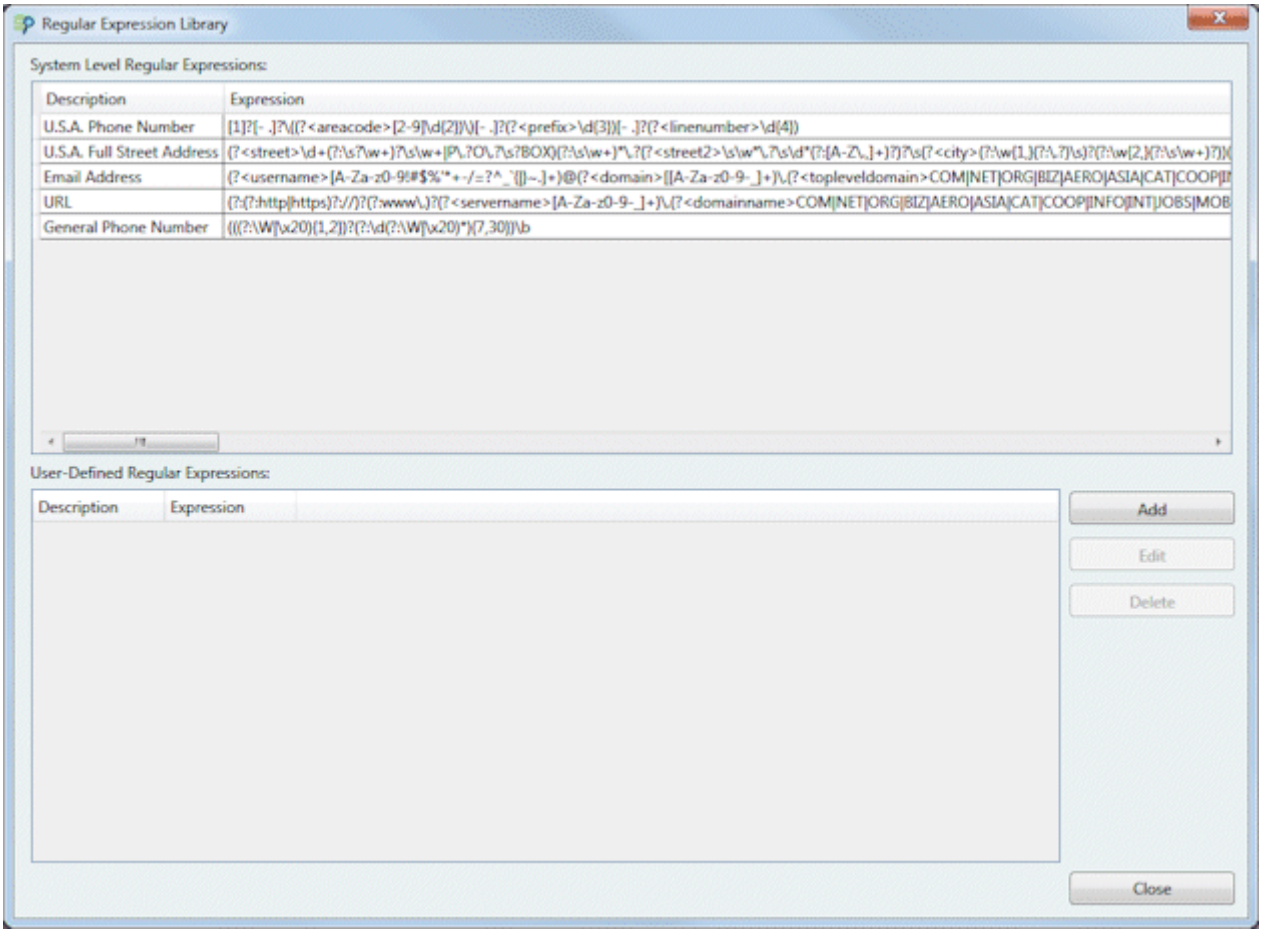
Managing the Regular Expression Library

The Regular Expression Library contains all of the regular expressions that have been configured for your Intelligent Capture for AP solution. Within the library, you can edit your system's default, pre-populated expressions (e.g., for Email Address, U.S.A. Phone Number, General Phone Number, etc.) and add, edit, or delete your own custom expressions. By configuring the regular expressions in the library, you can make them readily available when configuring your Intelligent Capture for AP solution, thus tailoring your solution for your specific needs.

To configure regular expressions within the Regular Expression Library:

1. From the Data Capture Configuration Tool's **Product Selection** screen, select the **Regular Expression Library Manager** utility and click **Open** to launch the **Regular Expression Library** dialog box.

Note: When configuring an Intelligent Capture for AP solution, you can also launch the **Regular Expression Library** dialog box from the **AP Vendor Identifier Setup** screen.

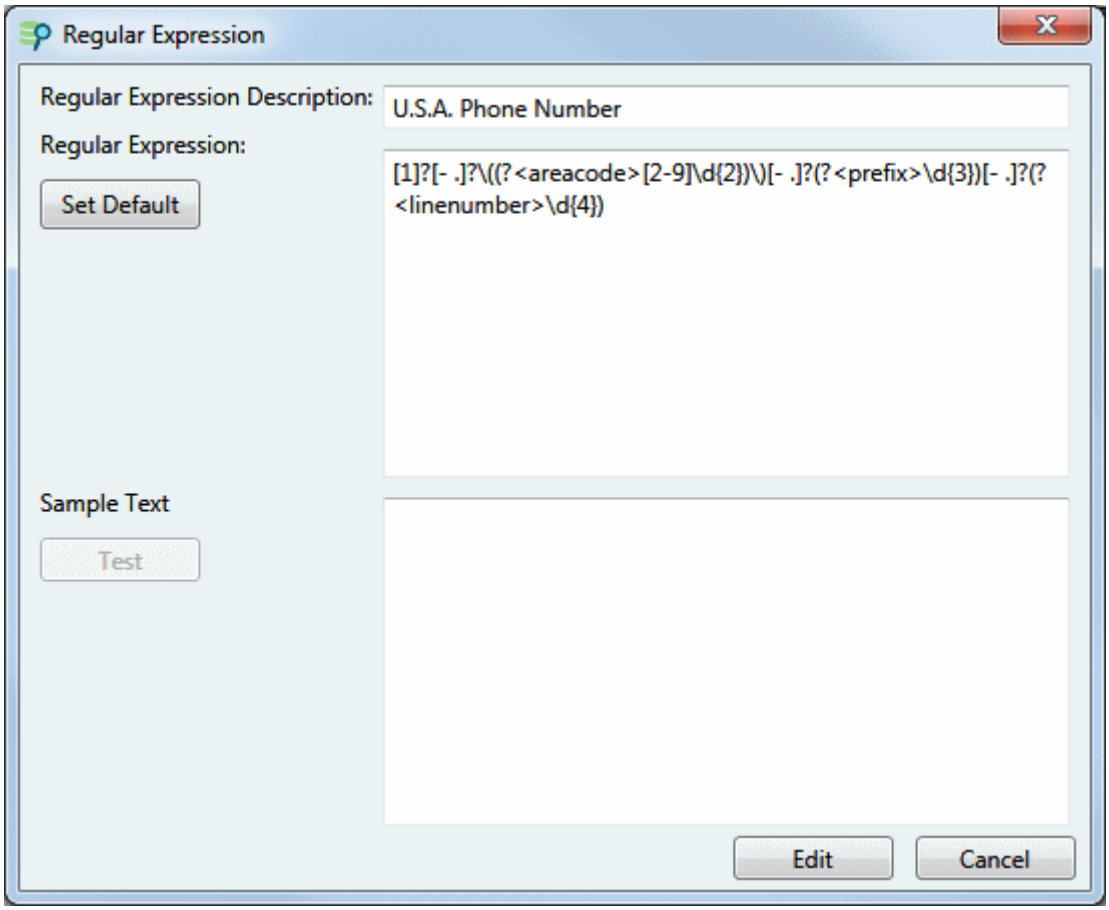


2. Do one of the following:
   - Edit a system default expression (see Editing Default Regular Expressions on page 156).
   - Create a new custom expression (see Creating Custom Regular Expressions on page 157).
   - Edit a custom expression (see Editing Custom Regular Expressions on page 159).
   - Delete a custom expression (see Deleting Custom Regular Expressions on page 160).
3. To save any changes made to the Regular Expression Library and return to the Data Capture Configuration Tool, click **Close**.

Editing Default Regular Expressions

To edit a system default regular expression:

1. From the **Regular Expression Library** dialog box, in the System Level Regular Expressions section, double-click on the regular expression's listing. The **Regular Expression** dialog box is displayed.



2. To change the description of the regular expression, edit the text in the **Regular Expression Description:** field.
3. To edit the form of the regular expression, edit the text in the **Regular Expression:** field.

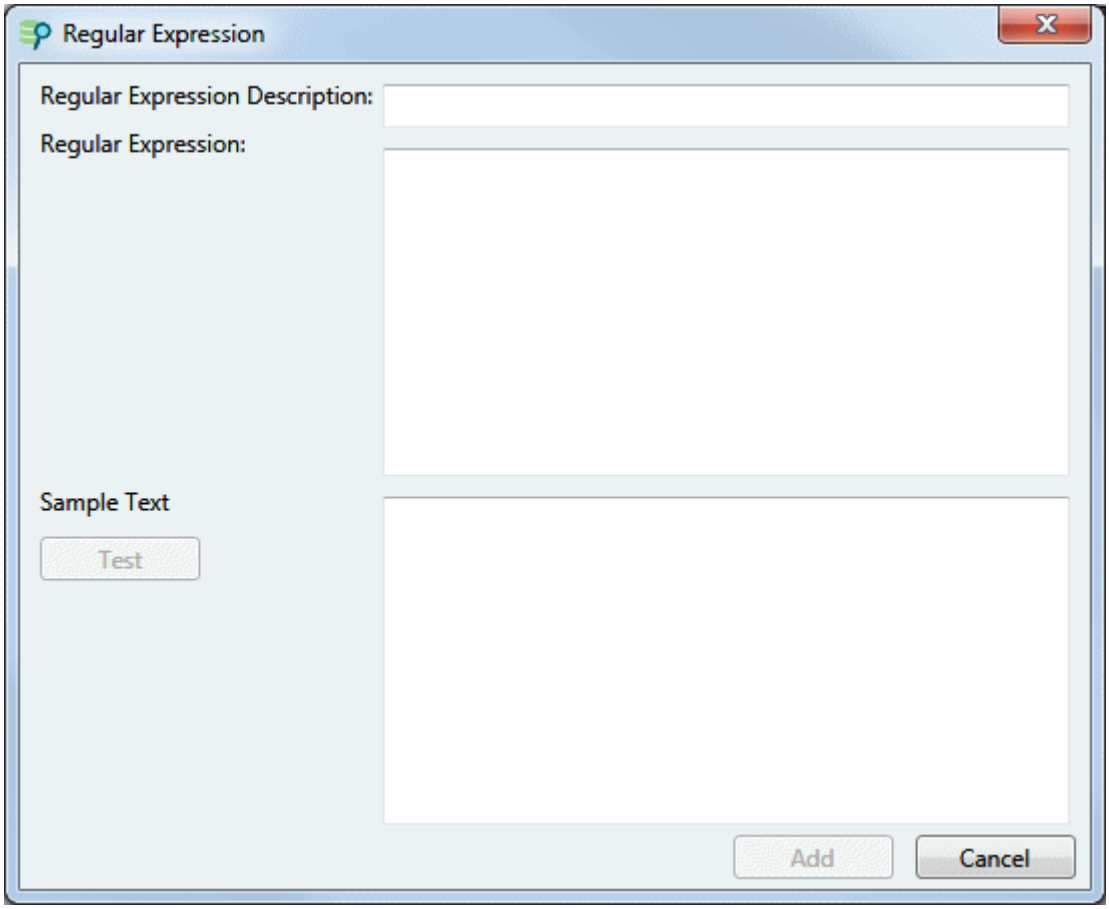
Note: To revert to the regular expression's default form, click **Set Default**.

4. To test sample text against the form of the regular expression, enter the text in the **Sample Text** field and click **Test**. A message is displayed, indicating whether the form of the regular expression was matched to the sample text.
5. To save your changes, click **Edit**.
6. To cancel your changes, click **Cancel**.

Creating Custom Regular Expressions

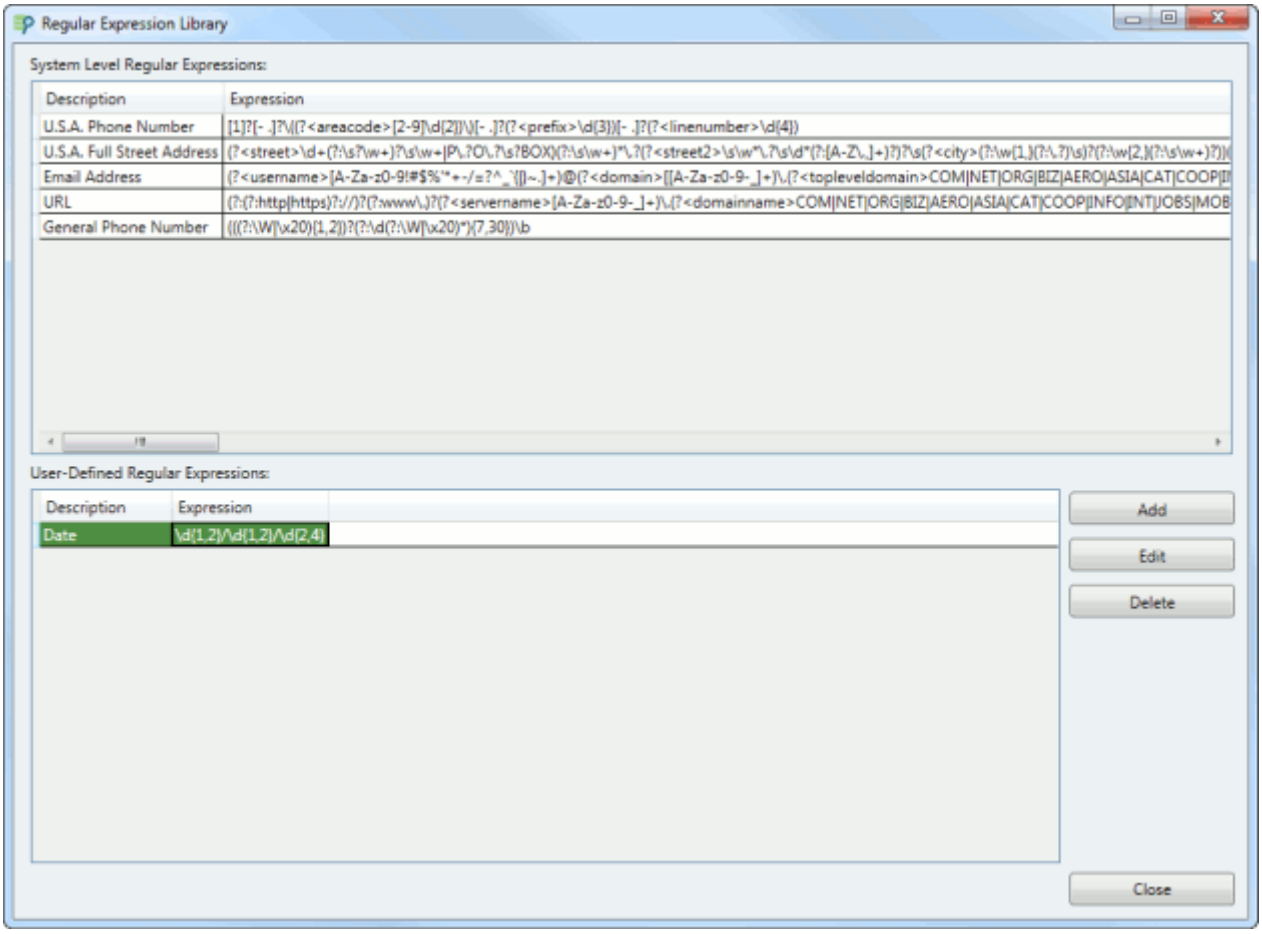
To create a custom regular expression:

1. From the **Regular Expression Library** dialog box, in the User-Defined Regular Expressions section, click **Add**. The **Regular Expression** dialog box is displayed.



2. Enter a description of the regular expression in the **Regular Expression Description:** field.
3. To add a regular expression, enter the form of the expression in the **Regular Expression:** field.
4. To test sample text against the form of the regular expression, enter the text in the **Sample Text** field and click **Test**. A message is displayed, indicating whether the form of the regular expression was matched to the sample text.
5. To save your changes, click **Add**.
6. To cancel your changes, click **Cancel**.

7. Once you have saved your changes to a custom expression, it is added to the User-Defined Regular Expressions section in the **Regular Expression Library** dialog box.

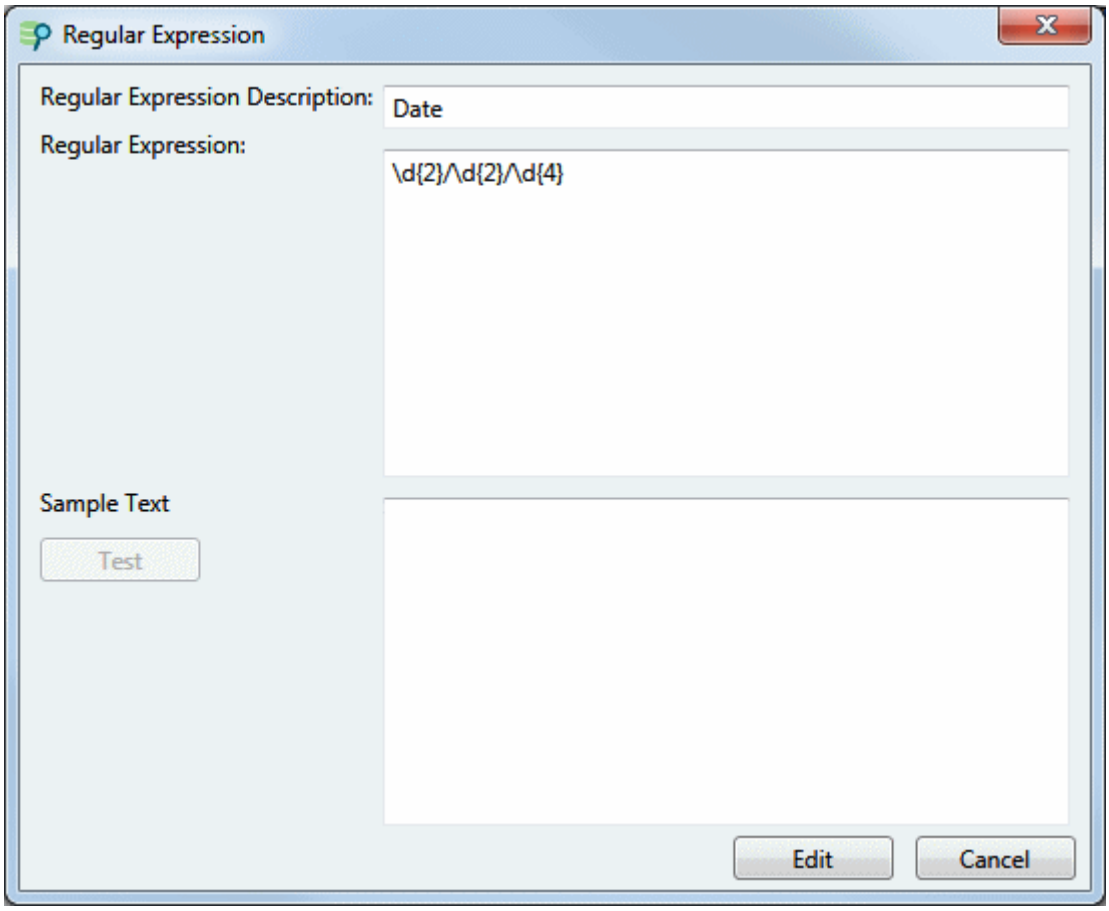


Once you have added custom expressions to the Regular Expression Library, you can edit or delete them as necessary. See the sections below for more information.

Editing Custom Regular Expressions

To edit a custom regular expression:

1. From the **Regular Expression Library** dialog box, in the User-Defined Regular Expressions section, select the regular expression's listing and click **Edit** (or double-click on the regular expression's listing). The **Regular Expression** dialog box is displayed.



2. To change the description of the regular expression, edit the text in the **Regular Expression Description:** field.
3. To edit the form of the regular expression, edit the text in the **Regular Expression:** field.
4. To test sample text against the form of the regular expression, enter the text in the **Sample Text** field and click **Test**. A message is displayed, indicating whether the form of the regular expression was matched to the sample text.
5. To save your changes, click **Edit**.
6. To cancel your changes, click **Cancel**.

Deleting Custom Regular Expressions

Note: While the system default regular expressions can be edited, they cannot be deleted.

To delete a custom regular expression:

1. From the **Regular Expression Library** dialog box, in the User-Defined Regular Expressions section, select the regular expression's listing and click **Delete**. A confirmation message is displayed.
2. Do one of the following:
   - To confirm the deletion, click **Yes**. The custom regular expression is removed from the User-Defined Regular Expressions section.
   - To cancel the deletion, click **No**. The custom regular expression remains in the User-Defined Regular Expressions section.

Primary and Secondary AP Document Types

Each OnBase Document Type used for Intelligent Capture for AP is mapped to one of the pre-configured AP Document Types, depending on how the Document Type is to be used in the solution.

Primary AP Document Types allow you to extract data from standard AP documents and automatically index OnBase Document Types with the extracted Keyword Values. Primary AP Document Types include the following:

- **PO Invoice**
- **Non-PO Invoice**
- **Purchase Order**
- **Packing Slip**
- **Bill of Lading**

Note: The **Invoice (General)** and **Credit Memo** AP Document Types are reserved for future functionality.

Secondary AP Document Types are used to capture additional types of documents that are not identifiable as a primary AP Document Type. The following table lists the secondary AP Document Types and how they are used:

Secondary AP Document Type	Description
AP Unknown	Used for documents that cannot be immediately identified before scanning or sweeping. The Intelligent Capture for AP classification process attempts to identify the correct AP Document Type and automatically reassigns the document to one of the other Document Types in the current scan queue. When the ICAP engine reassigns an **AP Unknown** document, any Keyword Values indexed prior to ICAP processing (for example, through manual pre-indexing or bar code processing) are retained and carried over to the newly identified Document Type. If multiple Document Types could be assigned by ICAP classification, the OnBase Document Type mapped to the **AP Unknown** AP Document Type must contain a superset of all of the Keyword Types that could be passed to the various possible Document Types in the scan queue. Because this AP Document Type is intended to be reassigned to a primary AP Document Type, **AP Unknown** documents are excluded from OCR data extraction and ICAP learning. However, if the ICAP engine automatically reassigns an **AP Unknown** document to a primary AP Document Type, OCR extraction and ICAP learning can occur for the reassigned document. **Note:** The **AP Unknown** AP Document Type is the only Document Type that the ICAP engine will reassign to another Document Type. If any other Document Type is assigned to a document, the engine does not perform Document Type classification on that document.
AP Support	Used for supplementary documents, such as supporting documentation or attachments, that do not contain information needing to be extracted. To save time on processing, **AP Support** documents are excluded from OCR extraction and ICAP processing, and ICAP learning does not occur for this AP Document Type.
AP Miscellaneous	Used for AP documents that do not belong to a primary AP Document Type but still contain information that needs to be extracted. Because **AP Miscellaneous** is used for extracting data, documents are included in OCR extraction and ICAP processing, and ICAP learning does occur for this AP Document Type.

The following best practice recommendations were assembled by a team of OnBase subject matter experts. They represent the accumulation of years of experience installing and configuring OnBase solutions.

The following recommendations are general in nature, and are applicable to most OnBase solutions and network environments. Depending on your solution design and your organization's needs, not all of the best practice recommendations listed below may apply to, or be recommended for, your OnBase solution.

Carefully consider the impact of making any changes, including those listed below, to your OnBase solution prior to implementing them in a production environment.

General Information

Recommended Standards for OCR Processing

Because OCR processing is an integral part of the Intelligent Capture for AP process, it is considered a best practice to ensure that all documents that undergo Intelligent Capture for AP meet the following recommended criteria for OCR processing. This will ensure that the OCR engine returns the most accurate results possible.

- Scan documents at a minimum resolution of at least 240 dpi (300 dpi recommended) when preparing documents for OCR processing. Depending on the needs of your solution, a higher resolution may be required. The use of lower resolutions in OCR processing results in illegible text captured from the image.

  The resolution should always be set to a squared value (such as 240x240 or 300x300 dpi). If poor or inaccurate OCR processing results are reported at 240 dpi, the documents should be discarded and re-scanned at incrementally higher resolutions until acceptable OCR results are achieved.
- Store bi-tonal (black and white) images using the TIFF-Group IV file format. Grayscale or color images should be saved using a lossless color-capable image file format.
- Scan documents as bi-tonal images. Bi-tonal images require far less disk space and load faster than grayscale or color images.

  However, if documents are originally scanned as grayscale or color images, it is recommended to process the original grayscale or color document and then convert the image to a bi-tonal format. The OCR engine will produce better results with the original color or grayscale document than it will with a dithered document, especially if there are areas of the page that are similar in contrast.
- Always get the best scanner image possible before resorting to image cleanup.
- Use a dedicated workstation for OCR processing.

- When configuring an OCR format, use the **Most accurate** Recognizer setting.

OCR vs. AutoFill Keyword Sets

When configuring a solution that uses both OCR processes and AutoFill Keyword Sets, if the AutoFill Keyword Set has accurate data and the primary Keyword Value is able to be consistently and accurately recognized, it is considered a best practice to obtain the applicable values from the AutoFill Keyword Set instead of obtaining each of these values individually through OCR processing. Using reliable AutoFill Keyword Sets whenever possible reduces processing time and improves accuracy.

For more information, see the **AutoFill Keyword Sets** module reference guide or help files.

Indexing Date Keywords

When indexing Date Keywords, it is considered a best practice to use the four-digit format **YYYY** when entering the year. Doing so will increase the accuracy of the indexing process.

Configuration

It is recommended that the following best practice information be considered before configuring your Intelligent Capture for AP solution.

AutoFill Keyword Set Configuration

It is considered a best practice to configure an AutoFill Keyword Set for the **PO Invoice** Document Type. Using the AutoFill Keyword Set to populate Keyword Values on documents instead of relying on the Intelligent Capture for AP engine to extract all of the values can improve accuracy and thus reduce the number of corrections an indexer has to make during verification.

Keyword Type Configuration

When configuring Keyword Types for your Intelligent Capture for AP solution, the following are considered to be best practices:

- In the **Keyword Options** dialog box, select the **REQN** column in the corresponding rows for the following Keyword Types:
  - **Vendor #**
  - **Vendor Name**
  - **Invoice Amount**
  - **Invoice #**
  - Any other Keyword Types that your business process requires

  If no value is found for one or more of these required Keyword Types, then the batch is routed for index verification.

- In the **Keyword Options** dialog box, select the **EXIDC** column in the corresponding rows for the following Keyword Types:
  - **Vendor #**
  - **Vendor Name**
  - **Culture Locale**
  - **Currency Code**
  - **Currency Symbol**
  - Any Keyword Types you do not expect to find on the documents in your solution (for example, **Workflow Status, ERP System**, etc.). This disables Interactive Data Capture indexing features for these Keyword Types at the Document Type level.

Common AP Keyword Types

While you must configure Keyword Types that apply to your own Intelligent Capture for AP solution, the sections below include some commonly used single-instance and multi-instance Keyword Types for AP solutions that you might want to use as a starting point. Many of these sample Keyword Types can be intuitively mapped to the pre-supplied Capture Data Types in the Data Capture Configuration Tool.

Common Single-Instance Keyword Types

It is recommended that you use the table below as a guide when configuring single-instance Keyword Types for your own solution.

Keyword Type Name	Data Type	Maximum Length
Vendor #	Alphanumeric	10
Vendor Name	Alphanumeric	40
PO #	Alphanumeric	15
Invoice #	Alphanumeric	10
Invoice Date	Date	N/A
Invoice Amount	Currency	N/A
Net Terms	Alphanumeric	20

Common Multi-Instance Keyword Types

It is recommended that you use the table below as a guide when configuring multi-instance Keyword Types for your own solution. Once you have created the individual Keyword Types, you can create a Multi-Instance Keyword Type Group and add these individual Keyword Types to the group. For more information on configuring Multi-Instance Keyword Type Groups, see the **System Administration** module reference guide or help file.

Keyword Type Name	Data Type	Maximum Length
Item #	Alphanumeric	20
Item Description	Alphanumeric	50
Quantity Back Ordered	Alphanumeric	10
Quantity Ordered	Alphanumeric	10
Quantity Shipped	Alphanumeric	10
Extended Price	Currency	N/A
Unit Price	Currency	N/A

Note: By default, OnBase does not support duplicate instances of Multi-Instance Keyword Type Groups (i.e., multiple instances of the same MIKG with the same Keyword Values). If you wish to store duplicate instances of MIKGs (e.g., if certain documents have repeating line items), it is considered a best practice to configure an additional **Line Number** Keyword Type for the MIKGs in your solution. This additional Numeric Keyword Type represents the line/sequence number of each individual instance of the MIKG, ensuring that at least one value in each instance of the MIKG is unique.

Keyword Type Group Configuration

When creating Keyword Type Groups for your Intelligent Capture for AP solution, the following recommendations are considered best practices.

Allow Null Values

It is recommended that you create Keyword Type Groups with the **Allow Null Values** setting enabled.

When this setting is selected, OnBase considers unindexed values null, which allows Intelligent Capture for AP to apply extracted values to the empty Keyword Types in the Keyword Type Group.

If you do not allow null values, OnBase inserts default values for unindexed Keyword Types with Date, Date & Time, Numeric, or Currency Data Types (for example, $0.00 for a Currency Data Type). With the default values applied, these Keyword Types are no longer considered unindexed, which prevents Intelligent Capture for AP from applying extracted values.

The **Allow Null Values** setting is automatically enabled when creating a Multi-Instance Keyword Type Group, but you must enable it manually when creating a standard Single-Instance Keyword Type Group. Once you have selected **Allow Null Values** and saved the settings, you cannot deselect it.

Scan Queue Configuration

When configuring scan queues for your Intelligent Capture for AP solution, the following are considered to be best practices:

- When creating scan queues for PO Invoices and Non-PO Invoices, the following approaches are recommended:
  - If users are going to assign Document Types manually, create separate scan queues for PO Invoices and Non-PO Invoices.
  - If the Intelligent Capture for AP engine's Document Type classification methods are going to be used, create a single scan queue for both PO Invoices and Non-PO Invoices. Once the Document Types have been automatically assigned by the engine, users should verify these Document Types during index verification.
- When any other, non-invoice primary AP documents in your solution (purchase orders, packing slips, or bills of lading), create a separate scan queue for each primary AP Document Type.
- Only add Document Types that are part of your AP solution to your Intelligent Capture for AP scan queues.

- If the Intelligent Capture for AP engine's Document Type classification methods are going to be used for a scan queue:
  - Assign the scan queue's default Document Type to the **AP Unknown** AP Document Type for any scan queue in which you expect to process more than a single Document Type (such as both invoices and attachments). This allows you to retain any Keyword Values pre-indexed to the document prior to ICAP processing and carry over those values once the ICAP engine classifies the document and reassigns the actual Document Type.

Note: The **AP Unknown** AP Document Type is the only Document Type that the ICAP engine will reassign to another Document Type. If any other default Document Type is assigned to a scan queue, the engine does not perform Document Type classification on documents in the scan queue.

  Assigning **AP Unknown** as the default Document Type for a scan queue also allows you to assign a custom OCR format to the **AP Unknown** Document Type and use those custom settings during OCR processing, which occurs before Document Type classification.
  - On the **Batch Processing** tab of the **Assign Process Options for <Scan Queue Name>** dialog box, select **Always Require Document Verification**. This ensures that users will have the opportunity to review the Document Types assigned by the engine.
- On the **Capture** tab of the **Assign Process Options for <Scan Queue Name>** dialog box, select **Include Sub-folders** and **One Document Per Folder**. This ensures that documents are brought into the scan queue as a single file, which allows the Intelligent Capture for AP engine to perform automatic document separation.

Data Capture Configuration

When configuring your Intelligent Capture for AP solution in the Data Capture Configuration Tool, the following are considered to be best practices:

- On the **AP Vendor Setup** screen, when available, select the **Vendor #** Keyword Type to be associated with the vendor data.
- On the **AP Vendor Option Setup** screen, select the **Vendor Label** option in the column next to the Data Set consisting of values for the **Vendor Name** Keyword Type.

- On the **AP Vendor Identifier Setup** screen, if available, configure the Data Sets in the following order (i.e., from easiest-to-identify to hardest-to-identify):
  - Phone numbers
  - Email addresses
  - URLs
  - Street addresses

Training the Intelligent Capture for AP Engine

While training the Intelligent Capture for AP engine, it is considered a best practice to run the Diagnostics Console to identify any errors that may occur and cause the Data Capture Server Windows Service to stop.

Configuring Regular Expressions

When working with regular expressions, it is considered a best practice to test the expression with the OnBase Regex Validator, available from Hyland Community or your solution provider. This helpful tool allows you to validate regular expressions and to view examples of the types of data typically captured by the Intelligent Capture for AP module.

If you know the full range of **PO #** values for your solution, it is considered a best practice to configure a custom regular expression to allow the Intelligent Capture for AP engine to more easily identify and extract these values, thus reducing processing time.

Installation

It is recommended that the following best practice information be considered before installing your Intelligent Capture for AP solution.

The Hyland.DataCapture.Server.exe.config File

Within the **Hyland.DataCapture.LoggingConfiguration** element, it is considered a best practice to only set the **level** setting to **Diagnostics** if you are troubleshooting an issue. When you set the **level** setting to **Diagnostics**, processing takes considerably longer to run.

A regular expression is a rule that specifies a particular format for a value. Several OnBase modules (e.g., Automated Redaction, Advanced Capture, and Intelligent Capture for AP) are able to use regular expressions to identify data.

Tip: When working with regular expressions, it is considered a best practice to test the expression with the OnBase Regex Validator, available from the Hyland Community or your solution provider. This helpful tool allows you to validate regular expressions and to view examples of the types of data typically identified by the Intelligent Capture for AP module.

Commonly Used Characters

The following is a list of characters that are commonly used in regular expressions.

Character	Description
\d	Matches any numeric character
\D	Matches any non-numeric character
\s	Matches any white space character (including **Tab** and **Alt** characters, ASCII 32 and lower)
\S	Matches any non-white space character
\w	Matches any word character (i.e., **A-Z**, **0-9**, and **_**)
\W	Matches any non-word character
*****	Denotes 0 or more instances of the preceding element
+	Denotes 1 or more instances of the preceding element
?	Denotes 0 or 1 instance of the preceding element
.	Matches any single character (i.e., wildcard)
^	Matches the starting position within the search string
$	Matches the ending position within the search string
[ ]	Matches any single character included in the specified set of characters (e.g., **[A-DF]** or **[ABCDF]** would match **A**, **B**, **C**, **D**, or **F**)

Character	Description
[^]	Matches any single character not included in the specified set of characters (e.g., **[^F]** would match any character except **F**)
( )	Denotes a logical grouping of part of an expression, as well as a SubMatch (e.g., if **[A-Z]{3}\s(\d{3})** is matched against **PSY 101**, then **101** is the SubMatch)
{ }	Denotes the minimum and maximum match counts (e.g., in the string **ABC1990**, **ABC\d{2,4}** would match **ABC19**, **ABC199**, or **ABC1990**)
|	Separates alternate possibilities (e.g., **Bob|Steve** would match **Bob** or **Steve**)
?:	Denotes that the SubMatch it is contained within will not be stored (e.g., **(abc)(?:defg)(123)** would only have two SubMatches: **abc** and **123**)

Commonly Used Regular Expressions

The following is a list of commonly used regular expressions.

Be aware that multiple expressions can be configured to specify each type of value; the following expressions are not the only expressions that can be used.

Also note that longer and more complex regular expressions might not be listed below. For a full list of your system's default, pre-populated regular expressions, access the Regular Expression Library.

Personal Information

Value Type	Example	Regular Expression
Name	Doe, John A	[A-Z]+,\s[A-Z]+\s[A-Z]+
Address	28500 Clemens Rd. Apt. 17b	For the full expression, see the default expression for **Business/Home Address** in the Regular Expression Library.
Social Security Number	123-45-6789	\d{3}-\d{2}-\d{4}

Value Type	Example	Regular Expression
Date of Birth (mm-dd-yy)	01-01-79 01/01/79	\d{2}(?:\W|/)\d{2}(?:\W|/)\d{2}
	01-01-1979 01/01/1979	\d{2}(?:\W|/)\d{2}(?:\W|/)\d{4}
	01-Jan-1979	\d{2}\W[A-Z]{3}\W\d{4}

Higher Education

Value Type	Example	Regular Expression
Term Name	Fall Semester 2000 Spring Semester 2001 Fall 2000 Spring 2001	(\S{4,6}\s)(?:SEMESTER)\s(\d{4})
Academic Year	Academic Year 1997 Academic Year 2001	(?:ACADEMIC YEAR)\s\d{4}
Course ID	PSY-101	\S{3}(?:\W|_)\d{3}

General Examples

Value Type	Example	Regular Expression
Alphanumeric	ABC 123	[A-Z]{3}\s\d{3}
	AF77-12345678	[A-Z]{2}\d{2}-\d{8}
Decimal	3.00 or 12.0 or 8 (3.00) or [12.00] or (8)	\W?\d{1,2}(?:\W|_)?\d{0,2}\W?
	$156.55	\$\d*\.\d{2}
	10.001257	\d+\.\d+
Date	June 06, 2011	[A-Z]+\s\d{2}[,.]\s\d{4}
	06 December, 2011	\d{2}\s[A-Z.,]+\s\d{4}

Value Type	Example	Regular Expression
Number	77-123456789	77-\d{9}
	0123456789	\d{10} (fixed length value)
		\d{5,20} (range)
		\d+ (variable, minimum length of one character to any maximum length value)

OnBase®
Foundation EP5

Intelligent Capture for AP

User Guide

Foundation EP5

Definitions

To better understand how Intelligent Capture for AP works, you should familiarize yourself with the following terms.

Suspect Level

The Suspect Level is the level of suspicion placed in the Keyword Values captured during Intelligent Capture for AP processing (ICAP processing). Suspect Keyword Values must be manually reviewed in index verification.

When a document is processed, the OCR engine gives each extracted Keyword Value a score between 0 and 100, depending on how suspicious the engine is of the OCR quality of the returned result. Lower scores indicate that the OCR engine is less suspicious of the extracted values, whereas higher scores indicate that the OCR engine is more suspicious of the extracted values.

The Suspect Level threshold is a configurable setting that specifies the highest limit at which a returned value's Suspect Level score is considered acceptable by the OCR engine. Any value with a score below the Suspect Level threshold is marked as acceptable, and any value with a score that exceeds the Suspect Level threshold is marked as suspect. For example:

- Setting the Suspect Level threshold to **100** indicates that all results will be marked as acceptable, because all results would fall below the threshold limit. No manual verification would be required since all results are considered acceptable.
- Setting the Suspect Level threshold to **0** indicates that all results will be marked as suspect, because all results would exceed the threshold limit. Manual verification would be required for every value since all results are considered suspect.
- By default, the Suspect Level threshold is set to **70**. Any captured value with a Suspect Level score of 70 or lower would be marked as acceptable, and any value with a score that exceeds 70 would be marked as suspect. Manual verification would only be required for values whose scores exceed the Suspect Level threshold of 70.

The Suspect Level threshold can be configured by an administrator in the **Hyland.DataCapture.Server.exe.config** file. For more information about this file and about configuring the Intelligent Capture for AP engine's Suspect Level threshold, see The Hyland.DataCapture.Server.exe.config File on page 46 and The Hyland.DataCapture.Server Element on page 48, respectively.

Index Verification

Index verification is the process of manually evaluating and, if necessary, correcting Keyword Values identified by the Intelligent Capture for AP engine that exceed the engine's configured Suspect Level threshold.

Indexing Overview

Intelligent Capture for AP allows you to immediately and automatically index a large number of documents imported into OnBase via a batch import module, such as Document Imaging, Disconnected Scanning, Document Import Processor, etc.

Intelligent Capture for AP is performed on batches of image or PDF documents imported via a scan queue configured to route batches to the batch status queue for ICAP processing in the Unity Client's **Batch Processing** layout.

During indexing, the Intelligent Capture for AP engine identifies the Document Type of the unindexed documents in the batch. The training method has the ability to "learn" the Document Type based on OCR information accumulated from trained documents, while the configuration method has the ability to identify the Document Type based on administrator-configured information. Once matched to a Document Type, the Intelligent Capture for AP engine is able to index the unindexed document.

Unlike Advanced Capture or other batch processing modules (such as Full-Page OCR, Batch Bar Code Recognition via the Bar Code Recognition Server), Intelligent Capture for AP is not manually initiated. The batch status queue configured for ICAP processing is polled at regular intervals by the Data Capture Server Windows Service, and when batches are routed to this batch status queue, they are automatically processed. No user intervention is required.

After a batch undergoes Intelligent Capture for AP, the batch is either routed to the next batch status queue configured for the scan queue, or, if some values read by the Intelligent Capture for AP engine exceed the engine's specified Suspect Level threshold, the batch is routed to the batch status queue configured for index verification.

Note: Depending on your configuration, all batches may be routed to the batch status queue configured for index verification, regardless of whether the values read by the Intelligent Capture for AP engine have been marked suspect.

Training Overview

To improve the Intelligent Capture for AP engine's ability to accurately index documents without manual user intervention, you can train the engine to find document identifiers and Keyword Values by performing index verification on batches that have already undergone ICAP processing. In confirming or correcting the indexing results achieved by the engine, you provide the engine with feedback on how effective its indexing logic was for processing a given batch. The engine can then incorporate this feedback when processing batches for the same vendor going forward, effectively honing its indexing logic and steadily improving over time.

When attempting to identify a Document Type, the Intelligent Capture for AP engine's logic allows for either of two classification methods: the Naive Bayes method and the Keyword Tag method.

The Naive Bayes method is the primary classification method. Occurring on a per-vendor basis, it uses probability to determine the likelihood that a given document matches a particular Document Type. Naive Bayes classification is used only if a document enters the vendor identification stage of the Intelligent Capture process without a Document Type, and once the vendor is identified, if learning has already occurred for the vendor. Also, only documents belonging to a Document Type assigned to the current scan queue are considered for Naive Bayes classification.

The Keyword Tag method is the secondary classification method. It analyzes the Keyword tags found on a document to try to predict the Document Type. Like Naive Bayes classification, Keyword Tag classification is used only if a document enters the vendor identification stage of the Intelligent Capture process without a Document Type. However, Keyword Tag classification can only occur if Naive Bayes classification fails to determine a Document Type and if the Intelligent Capture for AP engine has not previously been exposed to the document.

Document Type classification can be bypassed altogether if only one Document Type has been assigned to the scan queue, if a default Document Type has been assigned to the scan queue, or if a Document Type is assigned in the **Pre Index Scan Mode**. For more information on scan queue configuration and pre-indexing, see the **Document Imaging** module reference guide or help files.

Once a Document Type has been identified, the Intelligent Capture for AP engine can be trained to learn where to find Keyword Values on documents by analyzing the OCR results of the areas surrounding values that have been manually indexed using any of the Interactive Data Capture product's three indexing methods (i.e., Auto-Complete indexing, Point and Click indexing, or Swiping; see the **Interactive Data Capture** module reference guide for more information). Using these OCR results, the engine will attempt to learn which Keyword tags or contexts will identify a value, the approximate location of the value on a document, and the general format or pattern by which the value is captured. This information is then stored in the database and associated with the specific vendor that issued the document. When processing documents from this same vendor in the future, the engine will recall and use the information to attempt to accurately capture the desired data without manual user intervention.

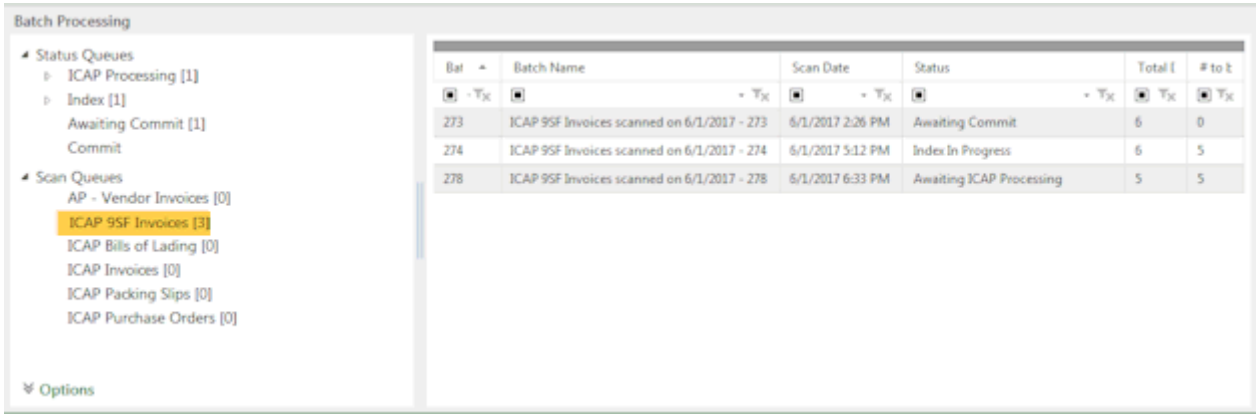
Performing Intelligent Capture for AP

The following sections explain how to index and verify batches being processed by Intelligent Capture for AP.

Indexing Batches

To perform Intelligent Capture for AP on a batch of documents in the Unity Client:

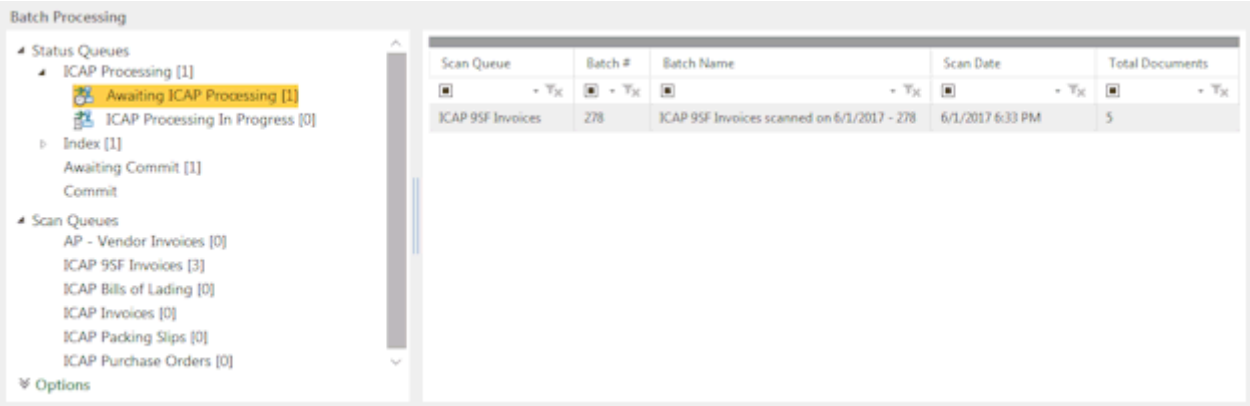
1. Import a batch of documents into OnBase via a scan queue configured to use Intelligent Capture for AP.
2. From the Unity Client, click the **Batch Processing** button in the **Imaging** ribbon group. The **Batch Processing** layout is displayed.



Note: Depending on your scan queue configuration, the batch you imported in step 1 may have been routed to a batch status queue prior to the ICAP processing batch status queue. If necessary, perform any necessary activities to route the batch to the ICAP processing batch status queue prior to continuing to step 3.

3. In the **Status Queues** list, expand the **ICAP Processing** node and select the batch status queue configured for the ICAP processing step in your solution. Depending on your configuration, this status queue may be named **Awaiting ICAP Processing**, or it may have a name customized for your solution.

   All batches residing in the queue, including the batch you imported in step 1, are displayed in the **Batches** pane.



4. Without intervention, the Data Capture Server Windows Service polls the batch status queue configured for ICAP processing. Once a batch is found, it is automatically processed.

Note: If you wish to skip ICAP processing, you must either right-click on the batch and select **Skip Intelligent Capture for AP** or select the batch and click the **Skip Processing** button in the **Processing** ribbon group. This immediately routes the batch to the next configured batch status queue.

Note: Depending on your configuration, multiple batches may be processed simultaneously. For more information, contact your system administrator.

5. Once processing is complete, the batch is routed to the next batch status queue:
   - If all documents in the batch are successfully indexed, and no values recognized by the Intelligent Capture for AP engine exceed the specified Suspect Level threshold, the batch is routed to the next batch status queue configured for the scan queue.
   - If no value is found for one or more required Keyword Types, the batch is routed to the batch status queue configured for index verification. For more information on configuring required Keyword Types, see Keyword Type Configuration on page 88.

- If the Intelligent Capture for AP engine identified a value for one or more of the documents that exceeded the Suspect Level threshold specified for the engine, then the batch is routed to the batch status queue configured for index verification.

Note: Depending on your configuration, all batches may be routed to the batch status queue configured for index verification, regardless of whether the values read by the Intelligent Capture for AP engine have been marked suspect.

Note: ICAP processing does not change any pre-indexed or Default Keyword Values. Additionally, any instances of a Multi-Instance Keyword Type Group assigned to a document during ICAP processing will not overwrite or merge with instances of the same Multi-Instance Keyword Type Group created by pre-indexed or Default Keyword Values.

Performing Index Verification

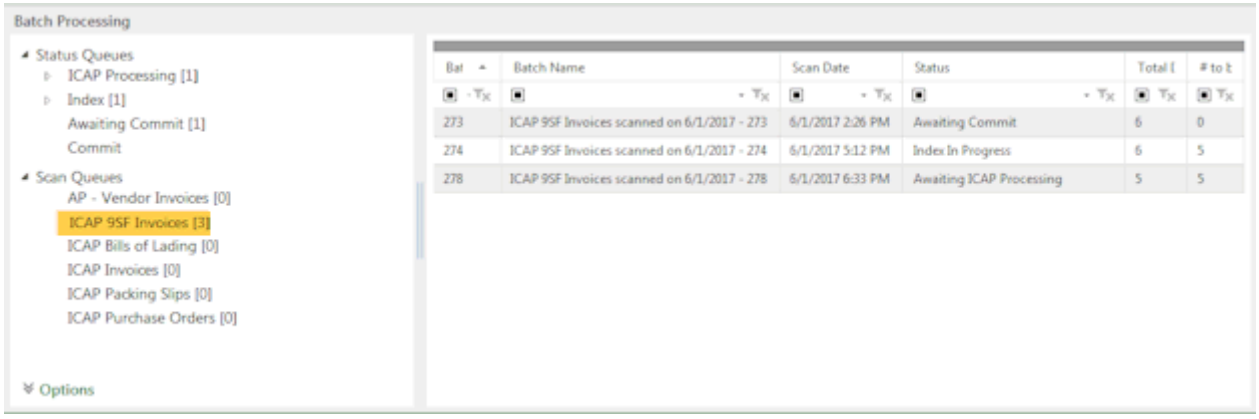
Index verification must be performed if document identifiers and Keyword Values for documents that undergo ICAP processing exceed the Intelligent Capture for AP engine's specified Suspect Level threshold.

If at least one value on one document in a batch did not meet this level, then the batch is routed to the batch status queue configured for index verification.

Note: Depending on your configuration, all batches may be routed to the batch status queue configured for index verification, regardless of whether the values read by the Intelligent Capture for AP engine have been marked suspect.

To perform index verification:

1. From the Unity Client, click the **Batch Processing** button in the **Imaging** ribbon group. The **Batch Processing** layout is displayed.



2. In the **Status Queues** list, expand the **Index** node and select the batch status queue configured for index verification in your solution. Depending on your configuration, this status queue may be named **Index in Progress**, or it may have a name customized for your solution.

   All batches residing in the queue are displayed in the **Batches** pane.

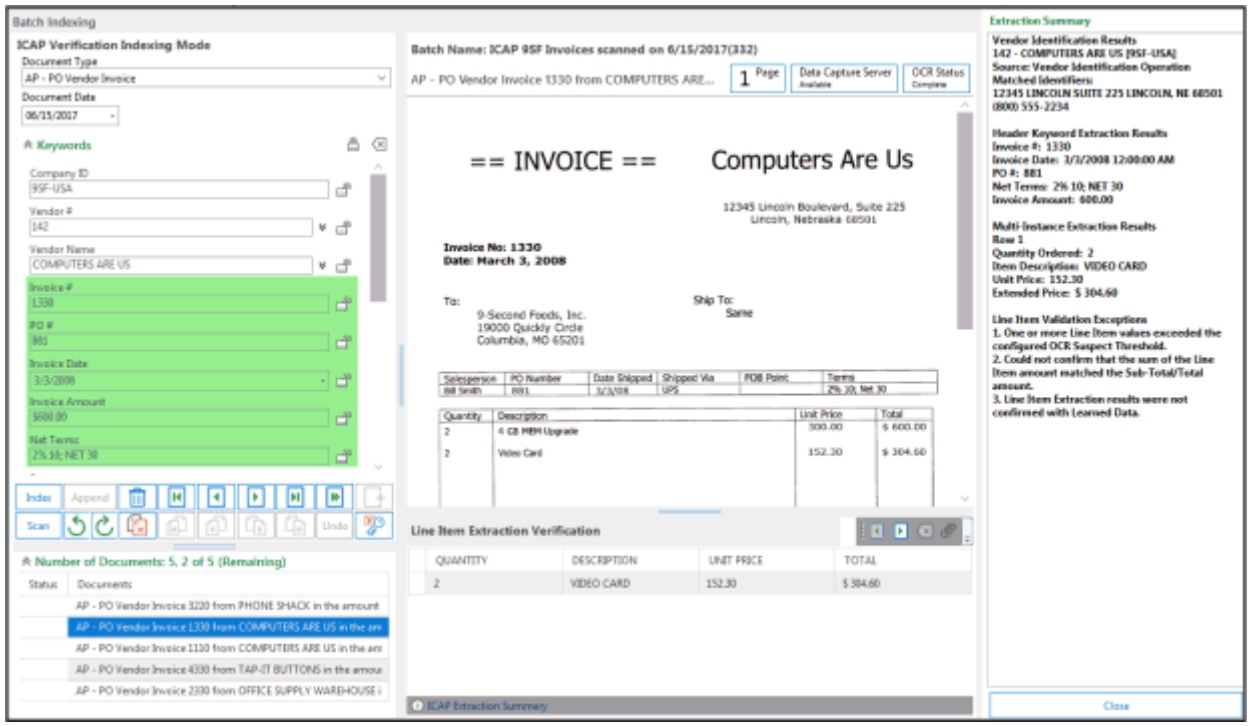
3. In the **Batches** pane, select the batch on which you want to perform index verification. Then do one of the following:
   - Right-click the batch and select **Index Documents**.
   - In the **Processing** ribbon group, click **Start Processing**.

   The **Batch Indexing** layout is displayed. The first document requiring index verification is displayed in the **Document Viewer**, and Keyword Values that were extracted from the document are populated in the **Keyword** panel.

   Any Keyword Values (including multi-instance Keyword Values) that were extracted from a detected table format on the document are populated in both the standard **Keyword** panel and the **Line Item Extraction Verification** panel, which is displayed below the **Document Viewer**.

   A summary of the document's extracted values is included in the **Extraction Summary** panel, which can be displayed to the right of the **Document Viewer** by clicking the **ICAP Extraction Summary** button at the bottom of the layout.

Note: While the standard **Keyword** panel displays all values extracted from the document, the **Line Item Extraction Verification** panel displays only the values extracted from table formats detected on the document. The **Extraction Summary** panel, on the other hand, displays all Keyword, vendor, and header data extracted from the document. For more information on using the **Line Item Extraction Verification** panel, see Performing Line Item Extraction Verification on page 186. For more information on using the **Extraction Summary** panel, see Reviewing the Extraction Summary on page 191.

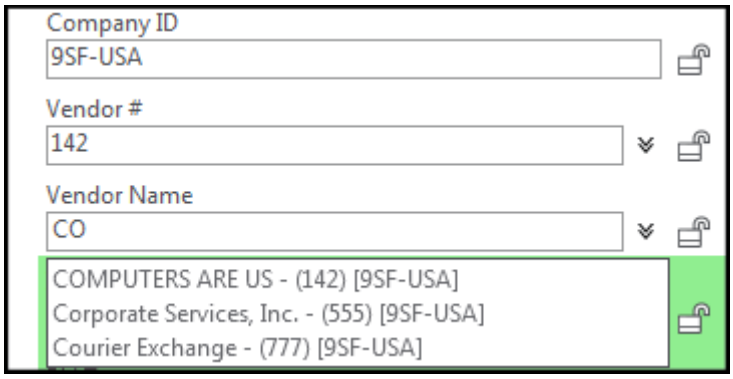


When performing index verification, note the following:

- Depending on your configuration, documents in the batch that have a value that exceeds the specified Suspect Level threshold may be the only documents displayed.
- Depending on your configuration and licensing, a Unity Form may be displayed instead of the standard Keyword panel. While Unity Forms are generally supported for Intelligent Capture for AP and Interactive Data Capture indexing features, note that Unity Forms are not supported for Interactive Data Capture indexing features on Keywords with select lists.

  For more information on using Unity Forms for indexing in the Unity Client, see the **Document Imaging** module reference guide or the **Document Imaging for Unity** help file.
- A label indicating whether the Data Capture Server is currently running (e.g., **Data Capture Server Unavailable**) is displayed above the upper-right corner of the **Document Viewer**.
- If the Data Capture Server is running, a label indicating the current indexing mode (e.g., **ICAP Verification Indexing Mode**) is displayed above the **Document Type** drop-down list.
- If OCR results must still be retrieved from the Data Capture Server before the next indexing action can occur, a label indicating that the **OCR Status** is **In Progress** is displayed above the upper-right corner of the **Document Viewer**.
- Once OCR data retrieval is complete, a label indicating that the **OCR Status** is **Complete** is displayed above the upper-right corner of the **Document Viewer**.
- If an error prevents OCR results from being retrieved, a label indicating that the **OCR Status** is **Error** is displayed above the upper-right corner of the **Document Viewer**.
- Once OCR data retrieval is complete, depending on your configuration, a message may display the OCR text of a location on a document in the **Document Viewer** when you hover over that location.

- If a **Vendor Name** and/or **Vendor Number** has been mapped for your solution and a vendor import process has been performed, but the ICAP process has failed to identify values for these Keywords, a drop-down list containing the Keyword's imported values is enabled for the corresponding Keyword Type field. You must enter at least the first 2 characters of the **Vendor Name** or **Vendor Number** and click the drop-down list button next to the Keyword Type field to enable the drop-down list. Unlike standard Data Set drop-down lists, these select lists are only available in the **ICAP Verification Indexing Mode**.



Depending on your configuration, the primary values in these drop-down lists may also include their corresponding secondary values in parentheses or brackets (for example, a **Vendor Name** value may be listed with its corresponding **Vendor Number** value in parentheses and (if applicable) **Company ID** value in brackets, as seen in the illustration). If you select one of these values from the list, the **Vendor Name**, **Vendor Number,** and (if applicable) **Company ID** values are populated or updated in the appropriate Keyword Type fields.

Note: The drop-down lists for **Vendor Name** and **Vendor Number** only display vendors with an active status. Any inactive vendors are not displayed.

- If your solution is configured and licensed for bar code recognition, Keyword Values may be populated from bar codes on documents. The process for verifying these Keyword Values and training the ICAP engine to learn the locations of bar codes is the same as with any other Keyword Values.
- If Intelligent Capture for AP identifies any **Numeric** or **Currency** Keyword Values of the format **<Keyword Value>CR**, those Keyword Values will be processed as credits. Any **Numeric** or **Currency** Keyword Value that is processed as a credit will be converted to a negative number before being assigned to the document.

4. Using the **Document Type** drop-down list, ensure that the correct Document Type is assigned to the document.

5. Before adding or modifying any Keyword Values, consider the statuses of each Keyword Type as signified by the following color highlights:
   - **Green:** No learned Keyword tags have been matched to the Keyword Type. Keywords are highlighted in green to indicate that this is potentially the first time the document has been processed by the Intelligent Capture for AP engine, which therefore used the general, pre-configured pool of tags to index the document. The Keyword Values need to be confirmed.
   - **Yellow:** The OCR quality is suspect. The Intelligent Capture for AP engine has determined a score for the extracted value that is higher than the configured Suspect Level threshold.
   - **Orange:** The method in which the value was extracted has led to suspicion. The Intelligent Capture for AP engine may determine that the extraction method was suspicious based on one or more of the following factors: which Keyword tag was used, or the location and/or distance of the tag in relation to the extracted value.
   - **Red:** Any combination of the above suspicions. The Intelligent Capture for AP engine has determined that multiple suspicious events have occurred in the process of extracting the value.

Note: Pre-indexed Keyword Values, Default Keyword Values, values captured for unmapped Keyword Types, and values assigned to the **Culture Locale**, **Currency Code**, or **Currency Symbol** Keyword Types are not signified by any of the above color highlights.

6. Click in the first highlighted Keyword Type field, and compare its contents with the appropriate value as displayed on the document. Then do the following:
   a. If the Keyword Value is incorrect or missing, correct the value by either manually entering it into the field or by extracting it from the document using any of the Interactive Data Capture indexing methods. For more information on these indexing methods, see the **Interactive Data Capture** module reference guide.

Caution: If **Culture Locale** has been mapped for your solution, ensure that the **Culture Locale** Keyword is populated correctly before using the Swiping indexing method or the Point and Click indexing method to populate **Currency** or **Date** Keyword Values. If the ICAP process has failed to identify the correct **Culture Locale** Keyword, any **Currency** or **Date** Keyword Values populated using the Swiping or Point and Click indexing methods may be inaccurate.

Note: Any of the Interactive Data Capture indexing methods can be used to train the Intelligent Capture for AP engine to learn where to find values on documents. When using Auto-Complete indexing, however, you must press **Tab** or **Enter** to accept a selected value from the drop-down list in order to use this value for training. If you press **Esc** to close the list without making a selection, or if you manually enter the full value in the field and then click in a different field, then learning will not occur for the current Keyword Type.

Tip: When using Auto-Complete indexing, pressing **Tab** to accept a selected value from the drop-down list both expedites the process and ensures that the value will be used for training. Using the mouse to navigate to other Keyword Type fields is not recommended unless only incorrect date values are suggested in the drop-down list, forcing you to manually enter the correct date value and then click in another field to retain the entered value.

   b. Once the value in the Keyword Type field is correct, navigate to the next Keyword Value needing review and repeat step 6. If no Keyword Values needing review remain for the document, click **Index** to display the next document in the batch that has at least one value needing review.

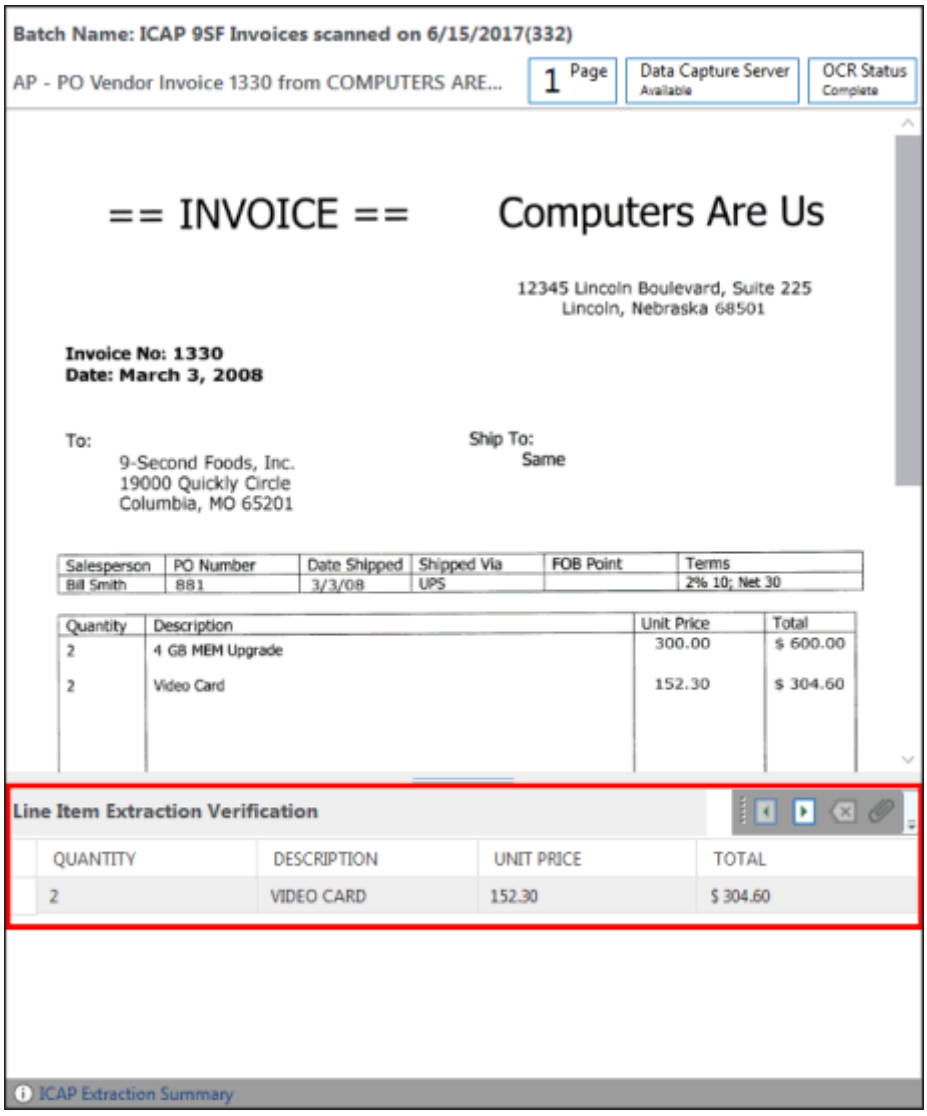
Tip: Depending on your configuration, you may be able to press **Tab** to automatically navigate to the next suspect Keyword Value. Alternatively, you may be able to press **Tab** to navigate to the next Keyword Type field (i.e., regardless of its contents) and **Shift+Tab** to navigate to the previous Keyword Type field. For more information, see the **Document Imaging** module reference guide or help files, or contact your system administrator.

7. Once all documents in the batch requiring index verification have been verified, the batch is automatically routed to the next configured batch status queue for the scan queue.

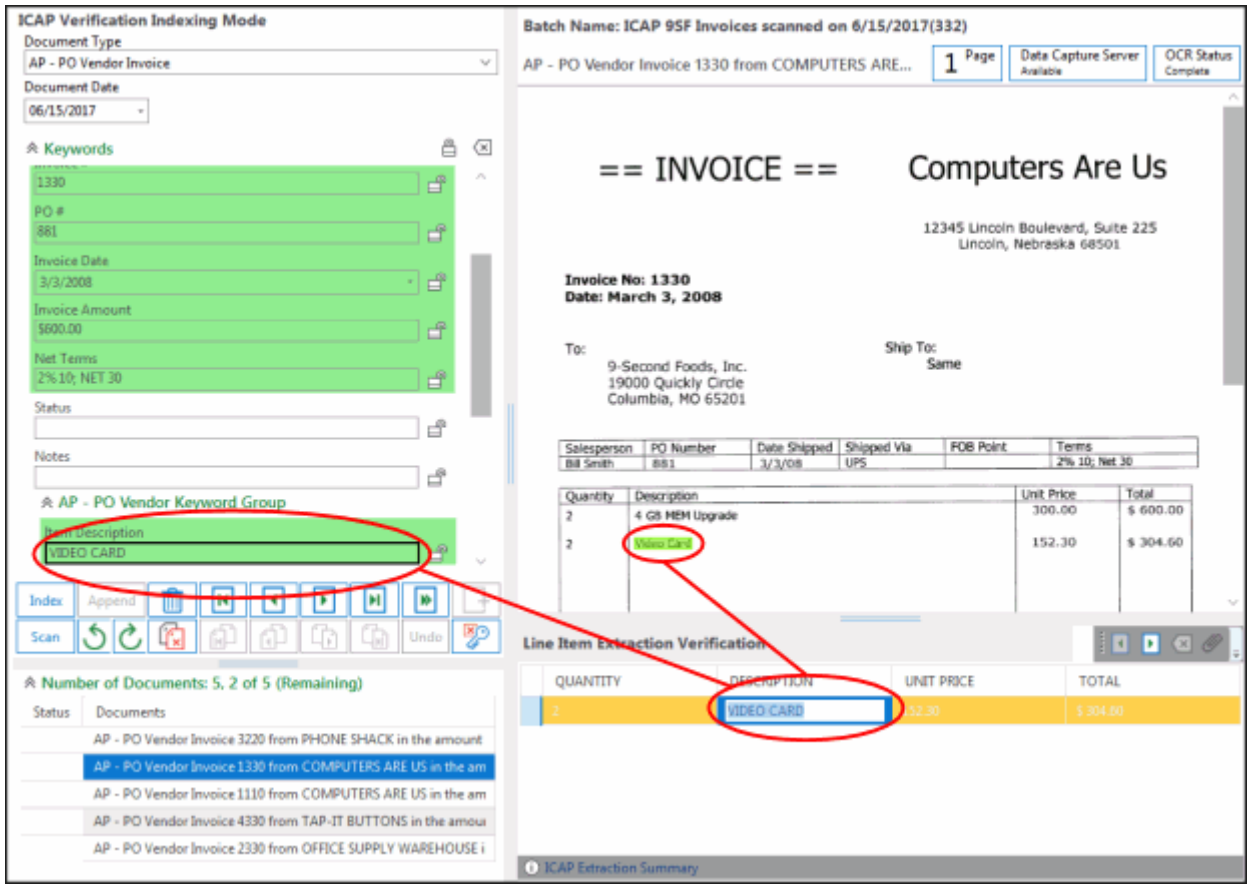
Performing Line Item Extraction Verification

While the standard **Keyword** panel can be used to verify all values extracted from documents during ICAP processing, the **Line Item Extraction Verification** panel is designed specifically for verifying line item values for Keywords that belong to Multi-Instance Keyword Type Groups. Unlike the standard **Keyword** panel, the **Line Item Extraction Verification** panel displays the values extracted from a table format detected on the document in a matching table display, complete with column headers. If a header value from the document cannot be read, a generic header (e.g., **Column 1**) is displayed in the value's place in the **Line Item Extraction Verification** panel.

When performing index verification on a batch that has undergone ICAP processing, the **Line Item Extraction Verification** panel is displayed below the currently displayed document in the **Document Viewer**.



As with the standard **Keyword** panel, the **Line Item Extraction Verification** panel allows you to select individual Keyword Values and applies the appropriate color highlights (i.e., the colors that correspond to the values' Suspect Level scores) to the currently selected value on the document in the **Document Viewer**. The corresponding Keyword Value in the standard **Keyword** panel is also highlighted with a thick black border.



Within the **Line Item Extraction Verification** panel itself, individual cells containing suspect values are outlined in a bronze border. Also, rows in the panel that contain line item validation exceptions are marked by a bronze highlight to the left of the row (i.e., instances where line item extraction results failed to meet the validation rules built in to the Intelligent Capture for AP engine to ensure the highest quality extraction data). Aside from the bronze border and the bronze highlight, any color highlights applied to the rows, columns, and individual cells within the **Line Item Extraction Verification** panel are for call-out purposes only; they do not correspond to any value's Suspect Level score or validation status.

Depending on the values extracted from the document during ICAP processing, the **Line Item Extraction Verification** panel might contain more than one line item table. While the Intelligent Capture for AP engine attempts to identify the primary line item table and displays it by default, you can navigate and manage the additional extracted data in multiple line item tables using the buttons in the upper-right corner of the **Line Item Extraction** Verification panel.

Button	Description
	Click **Previous** to return to the previous line item table.
	Click **Next** to navigate to the next line item table.
	Once you navigate to a new line item table, click **Extract** to clear the previous line item table's values from the standard **Keyword** panel and replace them with the values from the current line item table.
	Once you navigate to a new line item table, click **Merge** to merge the values from the current line item table with the previous line item table's values and add the merged values to the standard **Keyword** panel.

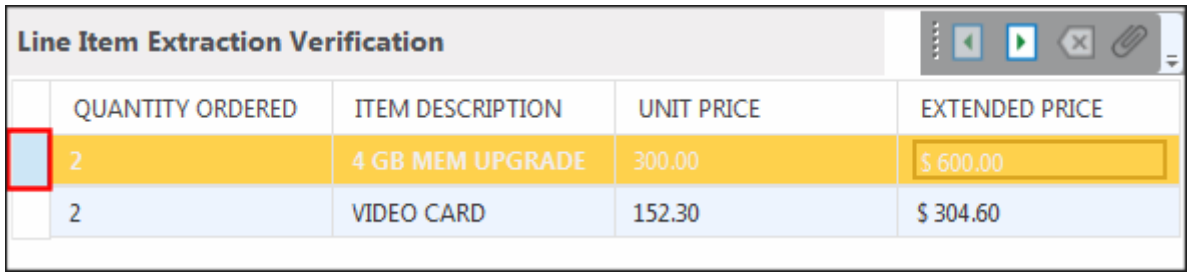
Once you have identified the appropriate line item table for the document, you can cycle through or edit the tables' values by first clicking on a Keyword Value in the **Line Item Extraction Verification** panel and then doing any of the following:

- Press **Tab** to navigate to the next value.
- Press **Shift+Tab** to navigate to the previous value.
- Edit the value in the currently selected table cell. Once you edit an extracted value in the **Line Item Extraction Verification** panel, the edited value is bolded and, if present, the bronze border around the cell is removed. The edited value is also automatically reflected in the corresponding Keyword Type field in the standard **Keyword** panel.

Note: While the values in the **Line Item Extraction Verification** panel can be used to assist with indexing a document, the Keyword Values in the standard **Keyword** panel are the values that are ultimately indexed. If you edit a value in the standard **Keyword** panel, the corresponding value is not automatically reflected in the **Line Item Extraction Verification** panel.

To supplement the common indexing features above, you can take advantage of the **Line Item Extraction Verification** panel's table format by doing any of the following:

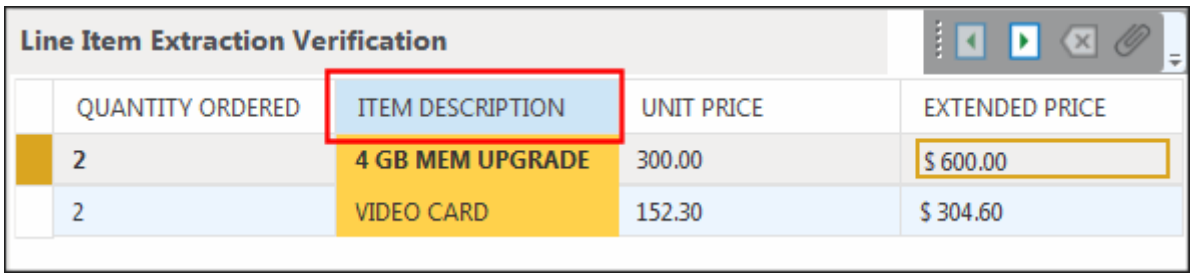
- Click to the left of a row in the panel to highlight the entire row in orange. The corresponding row is also highlighted on the document.



  Once a row is highlighted, you can press **Delete** to delete both the row from the **Line Item Extraction Verification** panel and its corresponding Multi-Instance Keyword Type Group from the standard **Keyword** panel. Before the items are removed from both panels, you will be prompted to confirm the deletion.

Note: Only one row can be deleted at a time.

- Click a column header in the panel to highlight the entire column in orange. The corresponding column is also highlighted on the document.



Once you have finished verifying multi-instance Keyword Values in the **Line Item Extraction Verification** panel for the current document, you can do one of the following:

- Click back in the standard **Keyword** panel to resume indexing single-instance Keyword Values for the current document, or to utilize the Interactive Data Capture indexing features for the multi-instance Keyword Values.
- Click **Index** to index the current document and proceed to the next document requiring index verification.

Training for Line Item Extraction

As with single-instance Keyword Values, you can use Interactive Data Capture's advanced indexing features (i.e., Auto-Complete indexing, Point and Click indexing, and Swiping) to train the Intelligent Capture for AP engine to learn where to find multi-instance Keyword Values on documents. However, Interactive Data Capture indexing is not supported when the focus is in the **Line Item Extraction Verification** panel. If you wish to use any of the Interactive Data Capture advanced indexing features for line items, you must first click in the appropriate Keyword Type field in the standard **Keyword** panel.

Note: When using Interactive Data Capture, all three indexing methods will strip any extra decimal places from extracted values and round appropriately to satisfy the formatting requirements of **Currency** or **Numeric** Keyword Types (e.g., an extracted value of **$32.5000** will be populated as **$32.50** for a **Currency** Keyword Type, **1.000** will be populated as **1** for a **Numeric** Keyword Type, etc.).

To train the Intelligent Capture for AP engine to learn where to find line item values on documents with more challengingly formatted tables (i.e., tables that include multi-line cells, staggered columns, etc.), you can use the Interactive Data Capture indexing features to take any of the actions described below.

Mapping Keyword Type Names to Column Headers

You can use any of the Interactive Data Capture indexing features to map the appropriate Keyword Type name from the standard **Keyword** panel to the corresponding column header in the **Line Item Extraction Verification** panel. For instance, if a column in the **Line Item Extraction Verification** panel displays values for the **Item Description** Keyword Type but has a generically named header (e.g., **Column 2**), using Interactive Data Capture to index one of these values in the **Item Description** Keyword Type field will rename the generic column header to **Item Description**.

Mapping Extracted Column Values to Keyword Types

When using any of the Interactive Data Capture indexing features to index a Keyword Value that corresponds to an extracted value in a column of the **Line Item Extraction Verification** panel, you can automatically map all of the extracted values for this column to their corresponding multi-instance Keyword Types. Once you use Interactive Data Capture to index one of these Keyword Values, you will be prompted with the following message:

Apply all values from column [<ColumnName>] to Multi-Instance Keyword Type [<KeywordTypeName>]?

- Click **Yes** to populate each multi-instance Keyword Type field with its corresponding value from the associated column in the **Line Item Extraction Verification** panel. The new values to be populated are temporarily highlighted in blue on the document.
- Click **No** to populate only the currently selected multi-instance Keyword Type field with the selected value.

Merging Columns

You can use Swiping to collectively select separate values spanning two separate columns to merge the columns into one. You will be prompted with the following message:

Would you like to merge column [<ColumnName1>] with column [<ColumnName2>]?

- Click **Yes** to merge the columns displayed in the **Line Item Extraction Verification** panel into a single value under the same header.
- Click **No** to populate the merged value in the first column without merging the second column.

Splitting Columns

You can use Swiping to select a specific portion of data in a column that contains more than one type of data. Selecting only a portion of the data in a column will prompt you to split the single column into two columns:

ICAP Verification has detected a partial column value. Would you like to split column [<ColumnName>]?

- Click **Yes** to split the column displayed in the **Line Item Extraction Verification** panel into two separate columns, with the selected value populating a column with a header matching the Keyword Type name and the unselected value populating a column with a **New Column** header.
- Click **No** to populate the selected value in the original column without splitting it.

You can also use Swiping to select a single row of data from an area on the document that contains stacked rows within a table cell. Selecting a single row containing a value that is not currently displayed in the **Line Item Extraction Verification** panel will prompt you to split the stacked rows into separate columns:

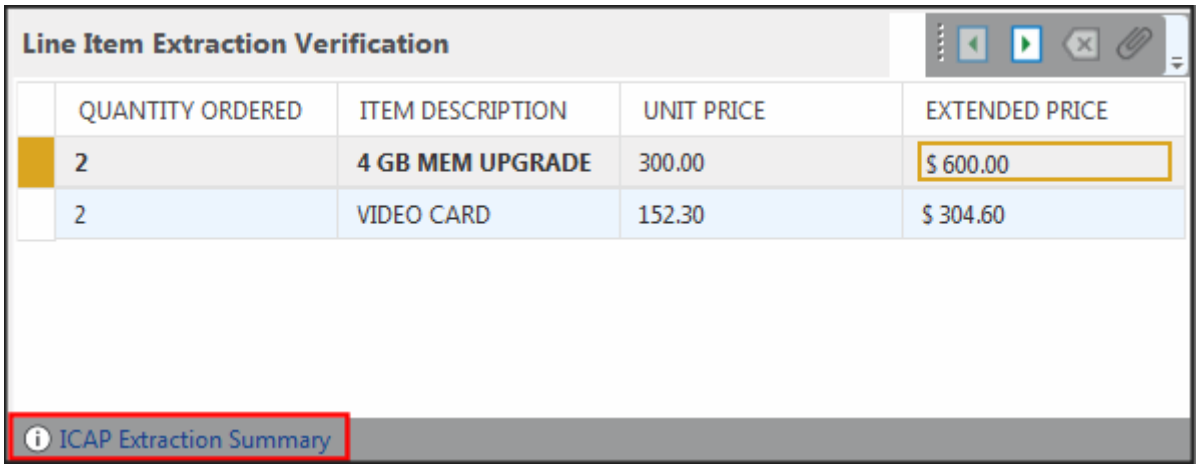
ICAP has detected a new column. Would you like to add this column?

- Click **Yes** to retain the original column displayed in the **Line Item Extraction Verification** panel with the original value (e.g., from the first stacked row) while adding a new column with the selected value (e.g., from the second stacked row) under a header matching the Keyword Type name.
- Click **No** to replace the original value in the original column with the selected value (i.e., without creating a new column).

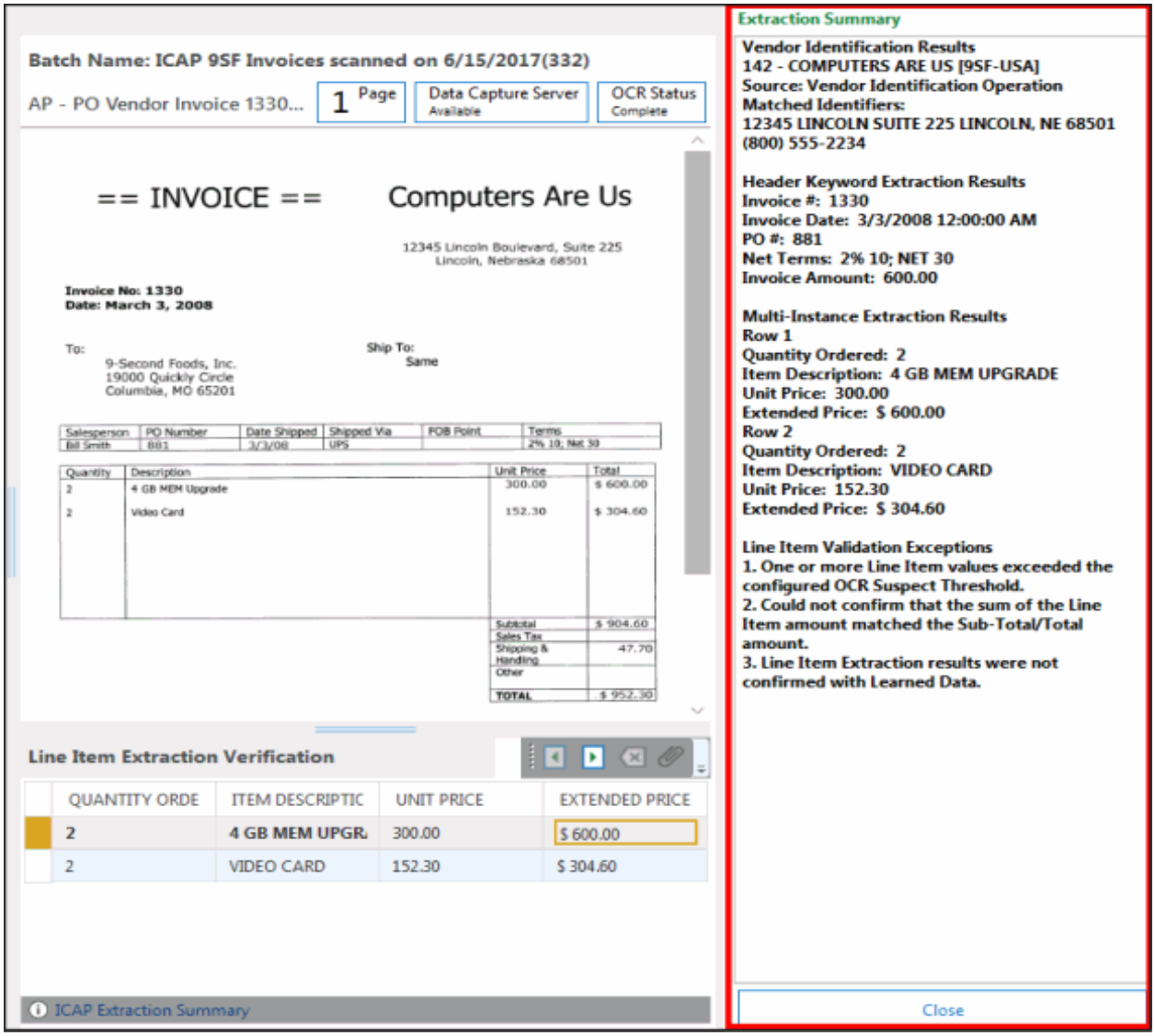
Reviewing the Extraction Summary

While both the standard **Keyword** panel and the **Line Item Extraction Verification** panel can be used to verify individual Keyword Values extracted from the document, the **Extraction Summary** panel can be used to quickly review all of a document's extracted Keyword, vendor, and header data in a single, consolidated display.

When performing index verification on a batch that has undergone ICAP processing, the **ICAP Extraction Summary** button is displayed at the bottom of the **Batch Indexing** layout, below the **Document Viewer** and, if displayed, the **Line Item Extraction Verification** panel.



To open the **Extraction Summary** panel, click the **ICAP Extraction Summary** button. The **Extraction Summary** panel is displayed to the right of the **Document Viewer**.



To close the **Extraction Summary** panel, either click the **ICAP Extraction Summary** button again or click the **Close** button at the bottom of the panel.

Depending on the extraction results for the current document, the following types of data may be displayed in the **Extraction Summary** panel:

- Vendor identification results, including vendor number, vendor name, and (if applicable) company ID
- Source of vendor identification information (the ICAP engine's vendor identification operation, pre-indexing, or an AutoFill Keyword Set)
- Identifiers related to an identification match
- All parsed phone numbers and addresses (when no vendor match is found)

- Identifiers related to a vendor match conflict (i.e., for repairing bad vendor data from the Data Capture Configuration Tool or your ERP system)
- Invoice summary/header extraction results
- Line item extraction results
- Line item validation exceptions (i.e., instances where line item extraction results failed to meet the validation rules built in to the Intelligent Capture for AP engine to ensure the highest quality extraction data)

Point and Shoot Indexing

Point and Shoot Indexing allows you to extract Keyword Values from any image document during indexing or re-indexing from within the OnBase Client's Document Imaging interface.

Point and Shoot Indexing is not specific to Intelligent Capture for AP solutions. It can be performed by any user with rights to index documents on a workstation licensed for any of the following:

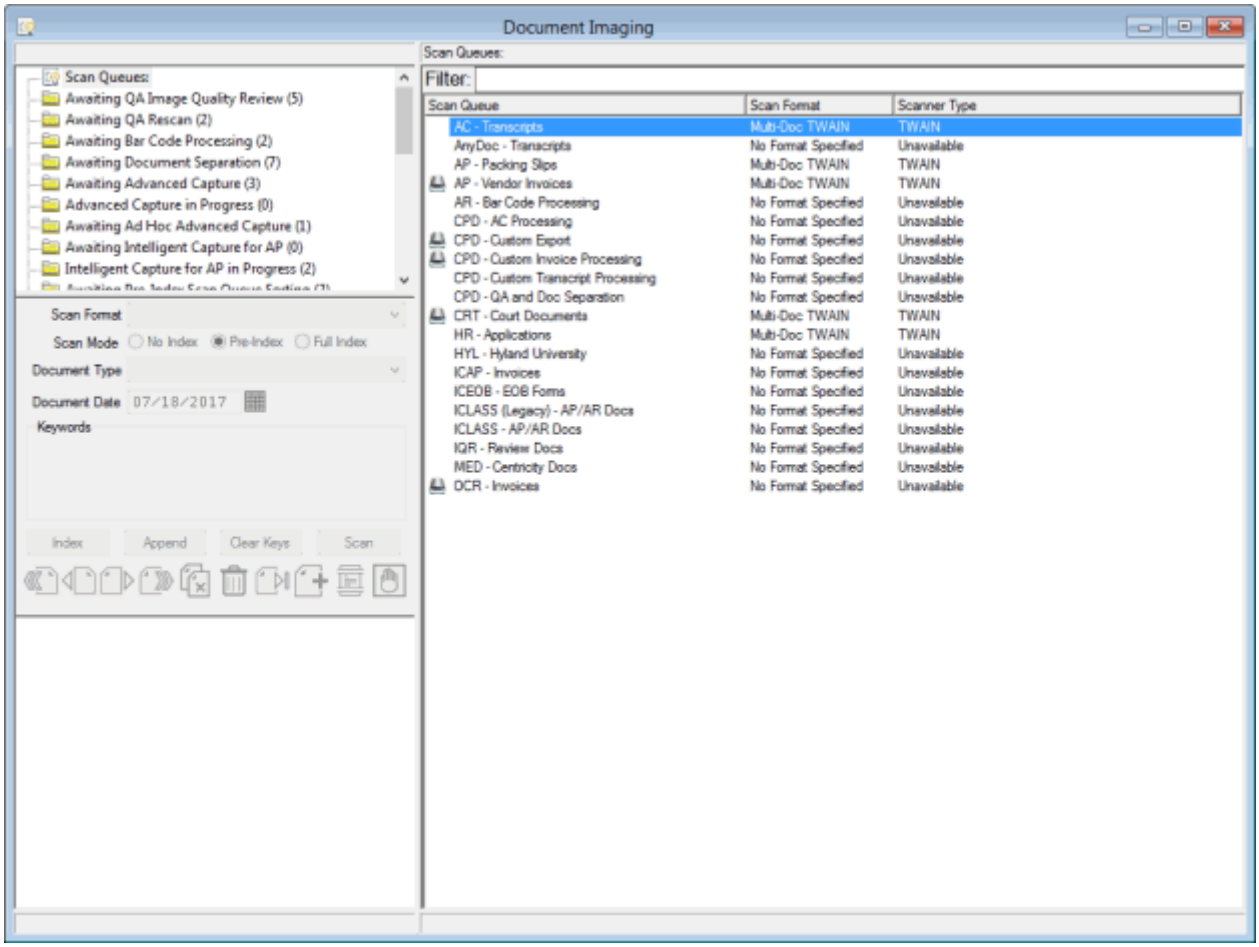
- Advanced Capture
- Ad-Hoc Advanced Capture
- Intelligent Capture for AP
- Interactive Data Capture

Note: While a batch that has undergone batch Intelligent Capture for AP can be reviewed, corrected, or indexed further in the Web Client or the Unity Client, Point and Shoot Indexing can only be performed in the OnBase Client. However, additional indexing features in the Unity Client are available through Interactive Data Capture. For more information on these additional indexing features, see the **Interactive Data Capture** module reference guide.

Performing Point and Shoot Indexing

To perform Point and Shoot Indexing:

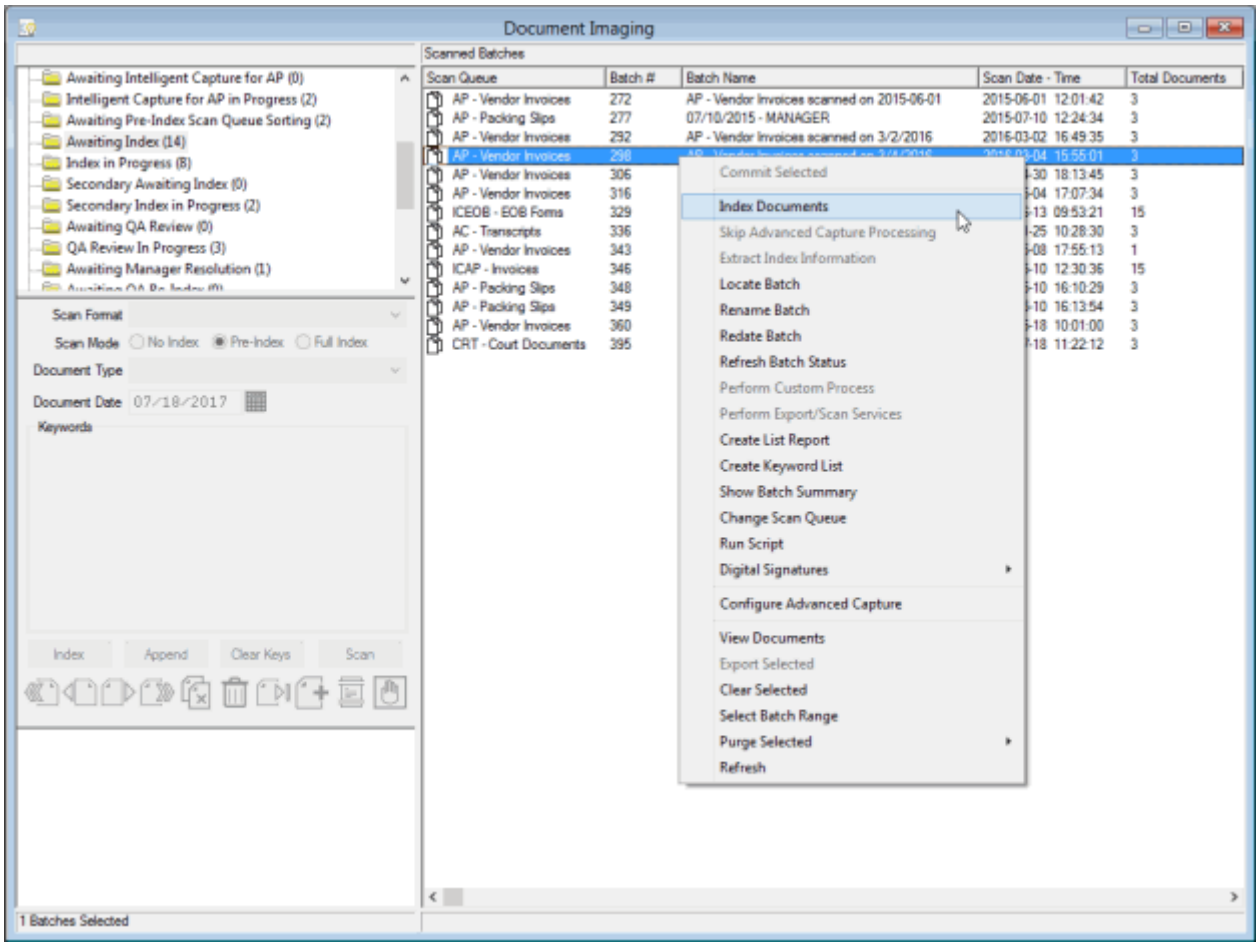
1. From the OnBase Client module, click **Processing** | **Scan/Index**. The **Document Imaging** window is displayed.



2. In the Queue List window, select an indexing or re-indexing batch status queue (i.e., **Awaiting Index**, **Index in Progress**, **Awaiting Re-Index**, **Re-Index in Progress**, **Awaiting QA Re-Index**, etc.). All batches residing in the selected batch status queue are displayed in the Working window.

Note: The following example demonstrates how to perform Point and Shoot Indexing on an invoice document residing in the **Awaiting Indexing** batch status queue. Depending on the batch status queue you are using, some menu options, button names, and types of documents may be different. Consult the **Document Imaging** module reference guide or help files for more information.

3. Right-click on a batch in the Working window and select **Index Documents**.

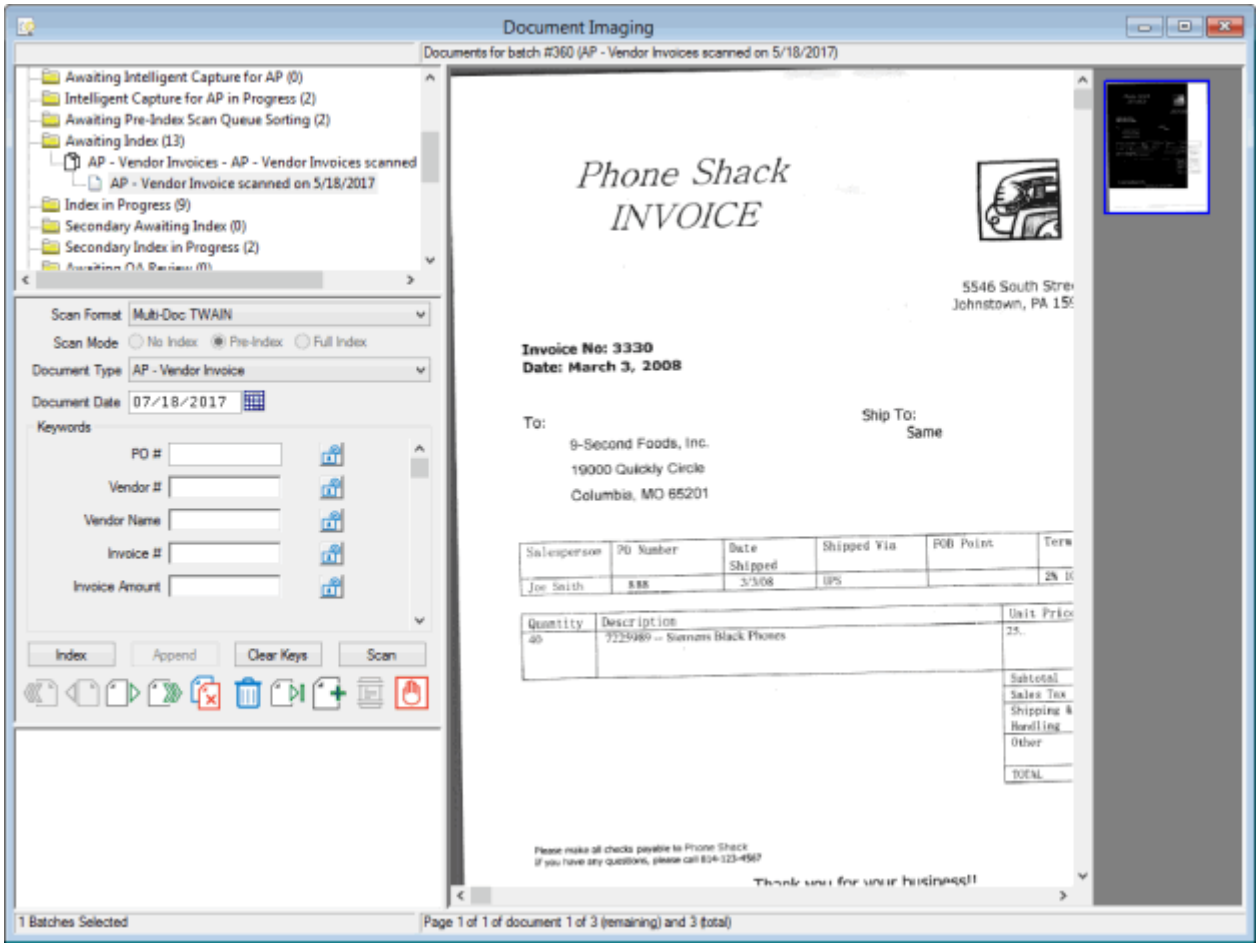


The first document in the batch is displayed in the Working window.

4. If a Document Type has not already been selected for the displayed document, select one from the Document Type drop-down for the displayed document.

   Once a Document Type is selected, the **Indexing** dialog box is populated with the Keyword Types associated with the Document Type.

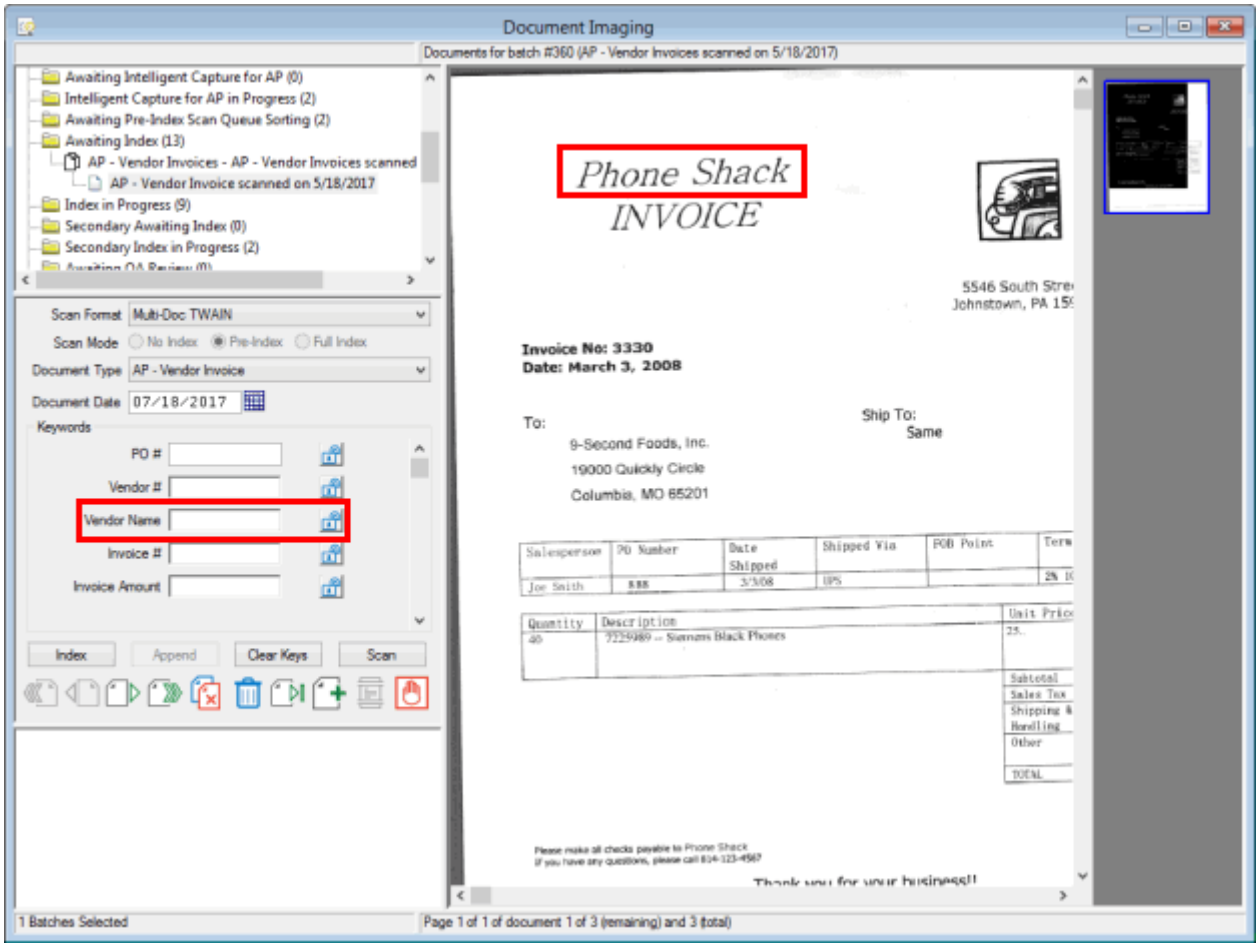
   For illustration purposes, the following example demonstrates the selection of a Document Type for an invoice, but your solution may involve other types of documents.



5. In the **Indexing** dialog box, set the focus to the field, either the Document Date field or one of the Keyword Type fields, that you would like to extract a value for.

6. In the Working window, press and hold the **Shift** key and click and hold the left mouse button while using the pointer to draw a box around the value that is to be extracted.

   For illustration purposes, the following example identifies the Vendor Name on an invoice, but your solution may involve other kinds of documents or data.

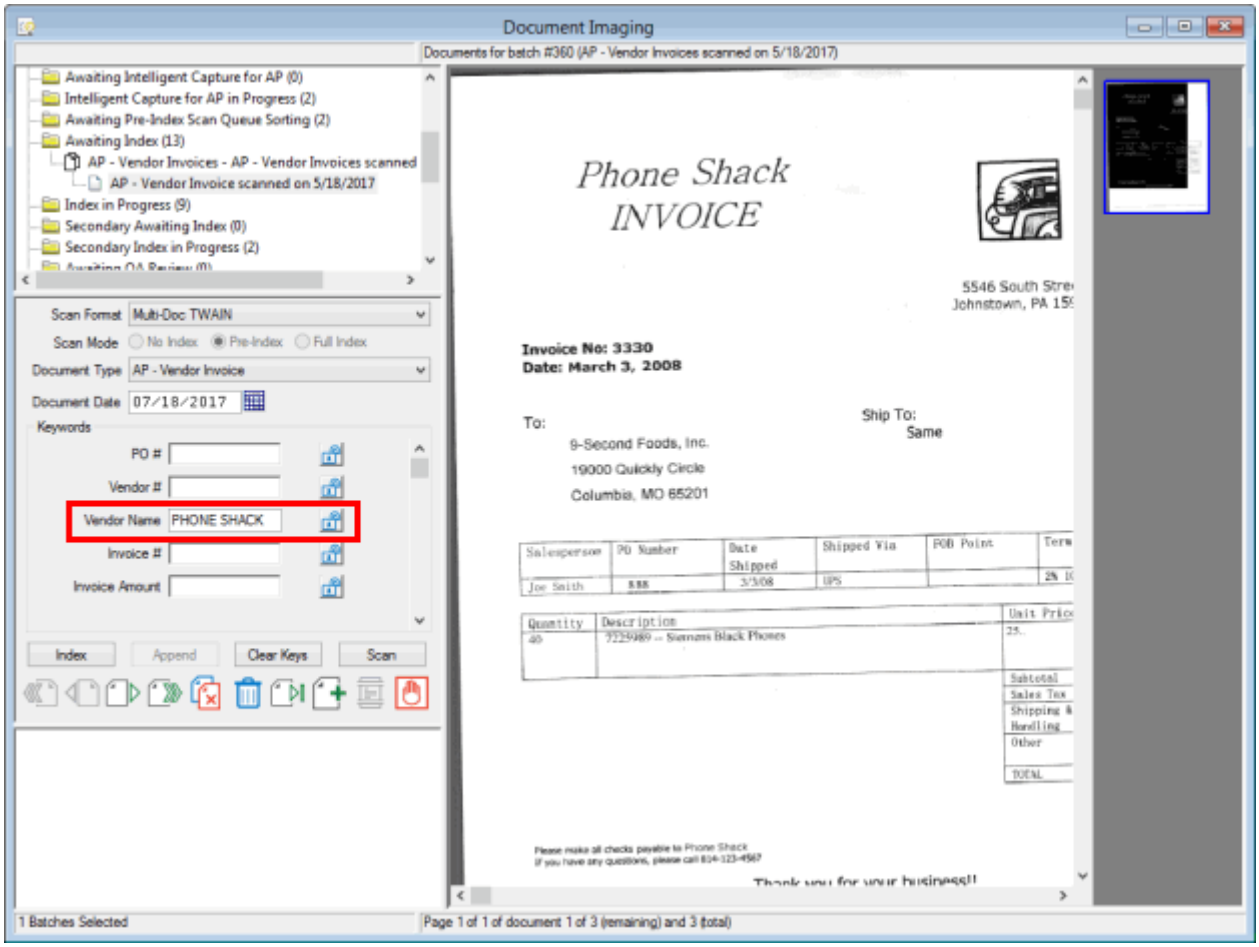


7. Release the **Shift** key and the left mouse button.

   There may be a brief pause while the OCR engine processes the area you selected.

8. The value returned from the selected area is automatically populated in the selected field. Note that the focus is still set to the field after the value is populated.

   For illustration purposes, the following example identifies the Vendor Name on an invoice, but your solution may involve other kinds of documents or data.



Note: If you are using Point and Shoot Indexing to extract a Keyword Value that is the primary value for an AutoFill Keyword Set, be aware that the AutoFill Keyword Set is not triggered until you set the focus to another Keyword Type field.

9. Repeat Steps 5 through 8 for each value that you would like to extract for the currently displayed document.

Tip: It is considered a best practice to always compare the values returned from the OCR engine to the actual values displayed on the document when performing Point and Shoot Indexing.

10. Once you are finished indexing the current document, click **Index**. The next document in the batch is displayed.

    Repeat Steps 4 through 9 for the remaining documents in the batch. Once all documents in the batch have been indexed, the batch is automatically routed to the next batch status queue configured for the scan queue.

A Note About Single and Double-Byte Characters

If your Intelligent Capture for AP solution is configured to identify Latin characters and/or Arabic numerals (i.e., single-byte characters such as those found in English, French, German, etc.) and you wish to use Point and Shoot Indexing to identify Asian characters on an image, you must press and hold **Ctrl+Shift** and then click and hold the left mouse button while using the point to draw a box around the value to be extracted.

Likewise, if your Intelligent Capture for AP solution is configured to identify Asian characters (i.e., double-byte characters such as those found in Chinese and Japanese) and you wish to use Point and Shoot Indexing to identify Latin characters and/or Arabic numerals, you must press and hold **Ctrl+Shift** and then click and hold the left mouse button while using the point to draw a box around the value to be extracted.

The language, or languages, that are identified by your Intelligent Capture for AP solution are set when configuring an OCR format. Multiple OCR Formats can be created, but only one can be assigned per Document Type.

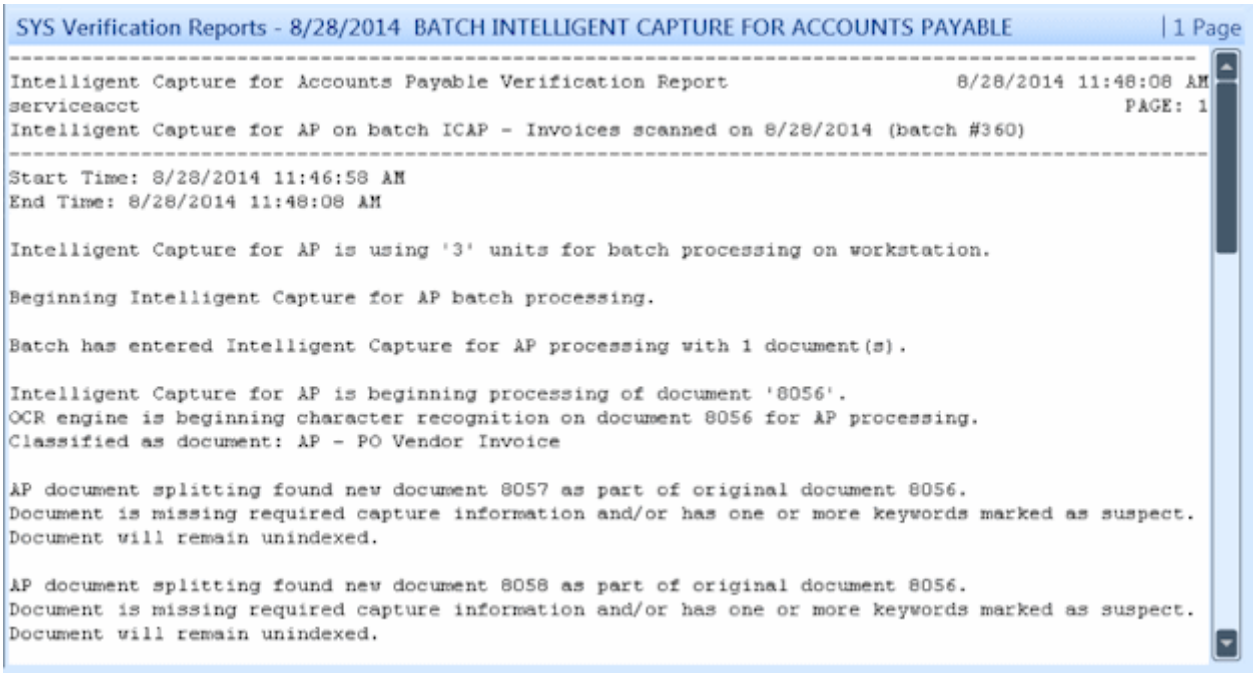
Administration

Viewing Verification Reports

Verification reports are automatically generated when ICAP processing is performed on a batch and when administrators perform import processes using the Data Capture Configuration Tool. The types of information contained in a report depend on the method by which the report was generated. Each verification report is stored in OnBase as a document in the **SYS - Verification Report** Document Type, and can be retrieved and viewed from within OnBase.

Batch Intelligent Capture for AP Verification Reports

When ICAP processing is performed on a batch, a verification report is generated and included as an additional document in the batch once the batch is routed to the next configured batch status queue for the scan queue. This Intelligent Capture for AP verification report is also stored in OnBase as a document in the **SYS - Verification Report** Document Type, and can be retrieved and viewed from within OnBase.



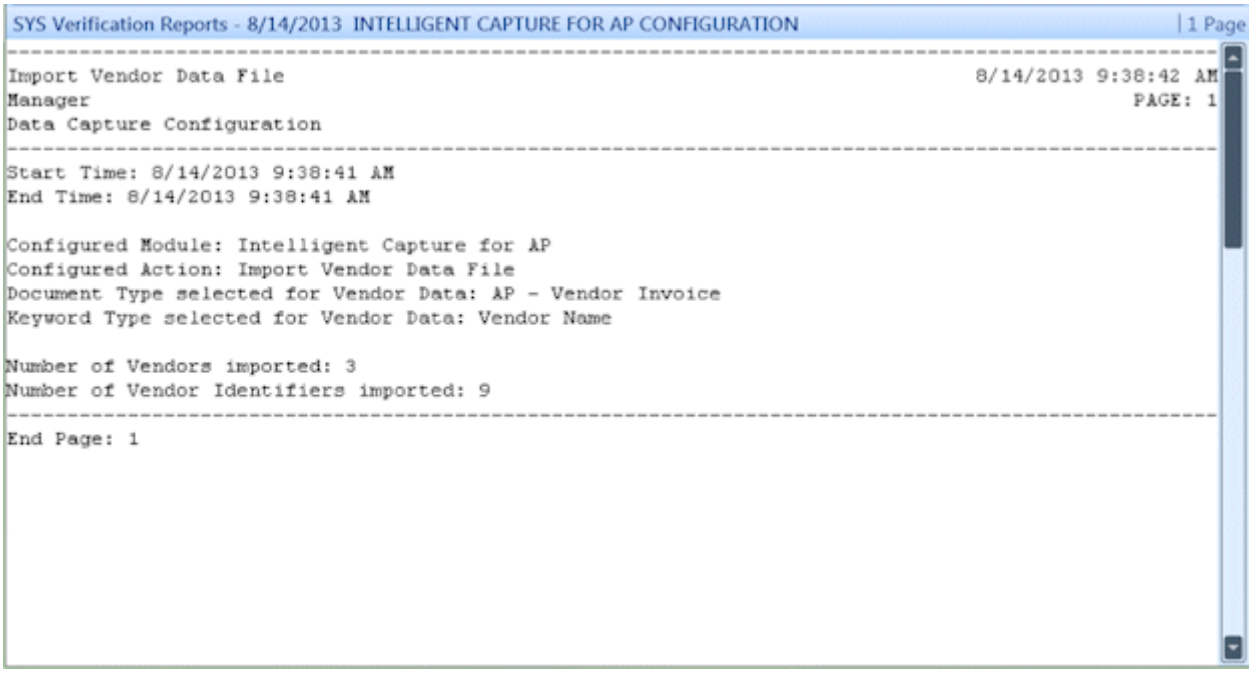
The batch Intelligent Capture for AP verification report contains the following information:

- The date and time that the verification report was generated
- The batch name and number
- The start and finish times of the Intelligent Capture for AP process
- The number of Intelligent Capture for AP Units (concurrent documents) licensed to the workstation
- The number of documents processed
- The Document Handle of each document processed
- The Document Type classified for each document processed
- The vendor identified for each document processed. If the **Company ID** capture data type has been mapped to a Keyword Type on the document, the company ID associated with the identified vendor is also included.
- The status of each document after processing (i.e., unindexed or active)
- Any errors encountered during the process

Note: The report generation time, process start time, and process finish time in the verification report are based on the time and time zone of the OnBase database.

Intelligent Capture for AP Configuration Verification Reports

When an administrator performs an import process (i.e., importing vendor data from a **.csv** or **.xlsx** file, or importing system-wide data from an XML file), a verification report is automatically generated.



The Intelligent Capture for AP Configuration verification report contains the following information:

- The date and time that the verification report was generated
- The start and finish times of the import process
- A summary of the configuration settings used during the import process, which corresponds to the information displayed on the Data Capture Configuration Tool's **Summary** screen after the import process has been completed (for more information, contact your system administrator)

Note: The report generation time, import start time, and import finish time in the verification report are based on the time and time zone of the OnBase database.

System Interaction

AutoFill Keyword Sets

Although AutoFill Keyword Sets are not a separately-licensed OnBase module or functionality, be sure to give additional consideration when using Intelligent Capture for AP to index a batch containing documents that are associated with an AutoFill Keyword Set.

For more information about AutoFill Keyword Sets, see the **AutoFill Keyword Set** module reference guide or help files.

External AutoFill Keyword Sets

The Intelligent Capture for AP engine can execute External AutoFill Keyword Sets using VB Scripts or SQL Select String queries to communicate with an external database. When used in conjunction with Intelligent Capture for AP, External AutoFill Keyword Sets may be used to extract AutoFill data from an ERP system and populate this data on invoices as they undergo ICAP processing, for instance.

When testing a SQL Select String query in OnBase Configuration, note that the data source must be 32-bit to be compatible with the 32-bit OnBase Configuration module. When configuring External AutoFill Keyword Sets for use with the Data Capture Server, however, the data source must be saved as a 64-bit driver data source to be compatible with the 64-bit Data Capture Server.

For more information on configuring External AutoFill Keyword Sets, see the **AutoFill Keyword Sets** module reference guide or help file.

Document Type Level vs. Keyword Type Level AutoFill Keyword Sets

When analyzing documents for AutoFill Keyword Set associations, the Intelligent Capture for AP engine first checks a document for a Document Type Level AutoFill Keyword Set. If none is found, the Intelligent Capture for AP engine then checks the document for any Keyword Type Level AutoFill Keyword Sets. If multiple Keyword Type Level AutoFill Keyword Sets are found, the first one identified is used to attempt to find a matching AutoFill Keyword Set for the document based on the Keyword Type associated with the AutoFill Keyword Set.

Primary Keyword Values Identified via Intelligent Capture for AP

If the Intelligent Capture for AP engine identifies a Keyword Value that is used as the primary Keyword Value for an AutoFill Keyword Set, the AutoFill Keyword Set is triggered and secondary Keyword Values are assigned to the document once the document has finished undergoing ICAP processing.

To ensure that all potentially important values are used to expedite AP processing, the Intelligent Capture for AP engine checks for primary Keyword Values of AutoFill Keyword Sets on each of the following Keyword Types, in order: **Vendor Number**, **Vendor Name**, and **PO Number**. First, during vendor identification, the engine checks the **Vendor Number** for AutoFill Keyword Sets. If an AutoFill Keyword Set is not triggered by a **Vendor Number** value, the engine then checks the **Vendor Name**. If an AutoFill Keyword Set is not triggered by a **Vendor Name** value, after Keyword extraction, the engine finally checks the **PO Number** (i.e., for **Purchase Order**, **PO Invoice**, and **Non-PO Invoice**). Depending on your configuration, the **PO Number** value might have to match the form of a configured regular expression to be accepted.

If an AutoFill Keyword Set is triggered, the populated values are checked against any learned values from the Data Capture Server and are colored according to Suspect Level score.

Primary Keyword Values Requiring Index Verification

If the Suspect Level score of the primary Keyword Value of the AutoFill Keyword Set exceeds the Intelligent Capture for AP engine's specified Suspect Level threshold, the document is routed to the indexing batch status queue for index verification, but the AutoFill Keyword Set is triggered and secondary Keyword Values are assigned to the document.

Keyword Values that are populated by the AutoFill Keyword Set (i.e., secondary Keyword Values) will never be marked suspect, regardless of the Suspect Level score of the primary Keyword Value.

Multiple Instances of Secondary Keyword Values

If an AutoFill Keyword Set attempts to assign secondary Keyword Values (i.e., either duplicate or unique values) to a document that has already had Keyword Values for these Keyword Types assigned to it via Intelligent Capture for AP, then the previously existing Keyword Value is overwritten by the secondary Keyword Value assigned by the AutoFill Keyword Set. This ensures that the Keyword Value will not be marked suspect.

For example:

> An invoice indexed via Intelligent Capture for AP was assigned an **Invoice #** of **12345** and a **Vendor Name** of **Computers R Us**, but the **Invoice #** of **12345** triggered an AutoFill Keyword Set that attempted to assign a value of **Computers R Us** to the **Vendor Name** Keyword Type. In this case, the previously existing instance of **Computers R Us** is overwritten by the **Computers R Us** value assigned by the AutoFill Keyword Set. This ensures that the **Computers R Us** Keyword Value will not be marked suspect.

Multiple Instances of an AutoFill Keyword Set with the Same Primary Keyword Value

If Intelligent Capture for AP identifies a Keyword Value that is the primary Keyword Value for an AutoFill Keyword Set, be aware that if multiple instances of the AutoFill Keyword Set exist with the same primary Keyword Value, then all instances of the AutoFill Keyword Set associated with this primary Keyword Value are assigned to the document.

Note: The **Expand All Matching Instances** configuration option for the AutoFill Keyword Set, which normally controls this behavior, is not respected for batches that undergo ICAP processing.

If Intelligent Capture for AP identifies a Keyword Value that is the primary Keyword Value for an AutoFill Keyword Set, be aware that if multiple instances of the AutoFill Keyword Set exist with the same primary Keyword Value, then the behavior of the AutoFill Keyword Set depends on how it was configured:

- If the **Expand All Matching Instances** option was not selected for the AutoFill Keyword Set, the batch is routed for index verification so that you can select the instance, or instances, of the AutoFill Keyword Set to assign to the document. This is the default behavior.
- If the **Expand All Matching Instances** option was selected for the AutoFill Keyword Set, all instances of the AutoFill Keyword Set are assigned to the document.

Creating AutoFill Keyword Sets via Intelligent Capture for AP

Instances of AutoFill Keyword Sets can automatically be created using data applied to a document from an Intelligent Capture for AP process if the associated scan queue has the **Store Keyword Set Data** option enabled. AutoFill Keyword Set data is only stored for documents that have been assigned to a Document Type and do not require index verification.