



### **Panagon Capture Automatic Indexing from Kodak Image Address**

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## Who Should Read This Document?

The Panagon Capture Technical Notes are intended for advanced users and system administrators. Capture application developers may benefit as well, by seeing how the process is accomplished in native mode.

This document describes how to:

- Create a settings collection and template
- Configure the Capture Index component to automatically index values from the Kodak Image Address

Only the information needed is included here. For a full discussion of Capture's options and features, see the other documents and online help provided with Capture.

This document assumes a basic understanding of Capture: a knowledge of Capture terminology and concepts, the ability to navigate the user interface and to create settings collections and templates.

# Contents

## Preface 3

**Who Should Read This Document? 3**

## Contents 4

## Automatic Indexing from Kodak Image Address 6

### **Overview 6**

What is an Image Address? 7

Fixed Field and Page Counter Field 8

Optional Counter Fields 9

Kodak Levels and Image Address Fields 10

Capture and Kodak Image Address 13

### **Before You Start 18**

### **Checking for a Usable Document Class 22**

User Indexes Report 23

Document Class Report 24

### **Outline of Steps 25**

**Create a Settings Collection and Template 26**

**Scan Sample Pages into the Settings Collection 29**

**Obtain Document Properties 30**

**Configure the Index Component 34**

**Test the Settings Collection 49**

**Worksheets 57**

Settings Collection and Template Worksheet 58

Sample Page Worksheet 59

Property Worksheet 60

Index General Tab Worksheet 61

Index Field Name List Worksheet 62

Index Field Worksheet 63

Test Worksheet 64

**Index 65**

# Automatic Indexing from Kodak Image Address

As the Capture system processes each page, it automatically assigns values to a variety of properties to the page. Because these values are collected automatically, the values provide a ready source of index information.

When a Kodak scanner scans a page, the scanner generates image address information which is incorporated to the properties of the page. Once the values from the image address are part of a page's properties, they can be automatically indexed.

For a full discussion of Index options and features, see the other documents and online help provided with Capture. For more information about Kodak image address, see the Kodak Mode Set Up documentation. For information about using properties from the image address to trigger actions, such as automatically creating batches or documents, see the Capture online help or the "Configuring the Event Activator" chapter in the *Panagon Capture Planning and Configuration Guide*.

## Overview

Automatic indexing is the process of placing index information directly in the index database during the capture process. Automatic indexing can reduce or eliminate the need for manual index entry.

## What is an Image Address?

The image address is a number generated by a Kodak scanner for use as a:

- Unique identifier
- Holder for information to print
- Holder for information to automatically index

For most scanners, the image address can contain up to 4 fields. Each field is separated by a period. The image address appears in the scanner display on the front of the scanner. The scanner operator reads the display from left to right. The image address can be configured, so not all 4 fields need to be displayed. Also, certain scanners can display 5 fields. An example of an image address is shown below.

**98203.2.13.23**

In the most common 4 field configuration, the rightmost field is almost always used as the page counter. The other 3 fields are optional.

**98203.2.13.23**

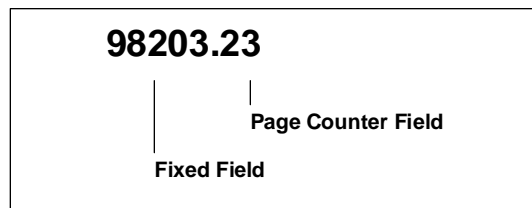
Fixed Field (Optional)  
Optional Counter Field  
Optional Counter Field  
Page Counter Field

## Fixed Field and Page Counter Field

The first of the fields is a fixed field. On most scanners, this field can contain only numeric data. However, some higher-end scanner models can contain alphanumeric characters. The fixed field information is entered into the scanner using the scanner's keypad. The scan operator enters the fixed field information when beginning a scan session. The fixed field is often used to show the current date. For example, at the start of a scanning session the scan operator might enter 98203, the day of year date meaning July 22, 1998. Day of year dates are sometimes miscalled Julian dates. Some sites use a scan operator's numeric ID instead of a date in the fixed field.

The remaining fields can contain solely numeric characters. These fields are counter fields. One of the counter fields increments as each page is scanned. Usually the page counter is the rightmost field in the image address. The page counter field is nearly always used and cannot be turned off. However, the scanner can be configured to display without this field in the image address.

The page counter field can be combined with the day of year from the fixed field and used as a unique identifier for a page. This is most appropriate when the pages being scanned are single page forms, such as simple medical or dental claim forms. When this method is used, the scanner is configured to show the image address without the two optional counter fields, as in the example below.





## Optional Counter Fields

The two remaining counter fields are optional, and can be configured to increment when a patch code is detected. These numeric counter fields can count different types of patch codes. For example, in scanning a page, detecting a patch code 2 or detecting a patch code 3 can increment one of the two optional counter fields. Most typically the patch codes types used are 2, 3, and T.

Incrementing image address fields with patch codes is done by a hardware patch code reader, which is a hardware option. To enable incrementing of the image address when a patch code is detected, you must use:

- A Kodak Patch Reader accessory on the scanner
- Kodak level rules or the Kodak batching option

A hardware patch reader can only read a limited width of the page being scanned. So, if the patch code on the printed page is on the left side and the reader is positioned at the right, the patch code will not be detected by the reader.

A simple solution for this is to use full page width patch codes whenever possible. A full page width patch code is printed from the right edge of the paper to the left edge across the full width of the page. This type of patch code format is sometimes called "edge to edge." Using full width patch codes eliminates missed reads caused by misalignment of the patch code and the reader.

## Kodak Levels and Image Address Fields

Kodak methods and terminology are strongly influenced by microfilm and microfiche practices. This can cause some confusion for people with little experience in these areas. The Levels are one such area of confusion.

Kodak Levels are numbered III (3), II (2), and I (1). Kodak originally devised the Levels to correspond to book, chapter, and page when copying books to microfilm or microfiche. That is, book is Level III, chapter is Level II, and page is Level I.

A common point of confusion for Capture administrators is that the Kodak Level numbers and the Capture ImageAddress numbers are not aligned but inverted, as you can see in the next table: Level III/ImageAddress1, Level II/ImageAddress2, Level I/ImageAddress3. The confusion is compounded because only Level I/ImageAddress3, the page counter, is used in nearly all situations.

As stated above, the optional image address counter fields are often associated with patch codes. Kodak uses Levels to align the optional counter fields and patch codes. In the table below Pos (position) is the order of the field in the scanner display, reading from left to right. The Patch Type shown in the table below is in a typical order. However, the patch code associated with the Kodak level and field can be configured using Kodak Mode Setup Software. An administrator can assign any patch code to any level. Therefore, your configuration may be different.

---

<b>Pos.</b>	<b>Kodak Field</b>	<b>Kodak Level</b>	<b>Patch Type</b>	<b>Capture Property Name</b>	<b>Comments</b>
1st	Fixed	N/A	N/A	ImageAddressFixed	The Fixed field is often used for today's date.
2nd	Field C	Level III	Patch Code 3	ImageAddress1	Level III is shown as patch code 3, but can be configured as 3, 2, or T.
3rd	Field B	Level II	Patch Code 2	ImageAddress2	Level II is shown as patch code 2, but can be configured as 2, 3, or T.
4th	Field A	Level I	none	ImageAddress3	Level I increments for each physical page.

The table below shows the relationships of the Levels in a common configuration. For more information about Kodak image address, see the Kodak Mode Set Up documentation.

Kodak Level	Relationship			Trigger	Frequency	Comments
	Book	Batch	Folder			
Level III	Book	Batch	Folder	Patch 3 causes Level III / Field C to increment.	Increments least often	Optional
Level II	Chapter	Document	Batch	Patch 2 causes Level II / Field B to increment	Increments more often than III but less than I	Optional
Level I	Page	Page	Page	Each page scanned causes Level I / Field A to increment	Increments most often	The counter for this field cannot be turned off.

## Capture and Kodak Image Address

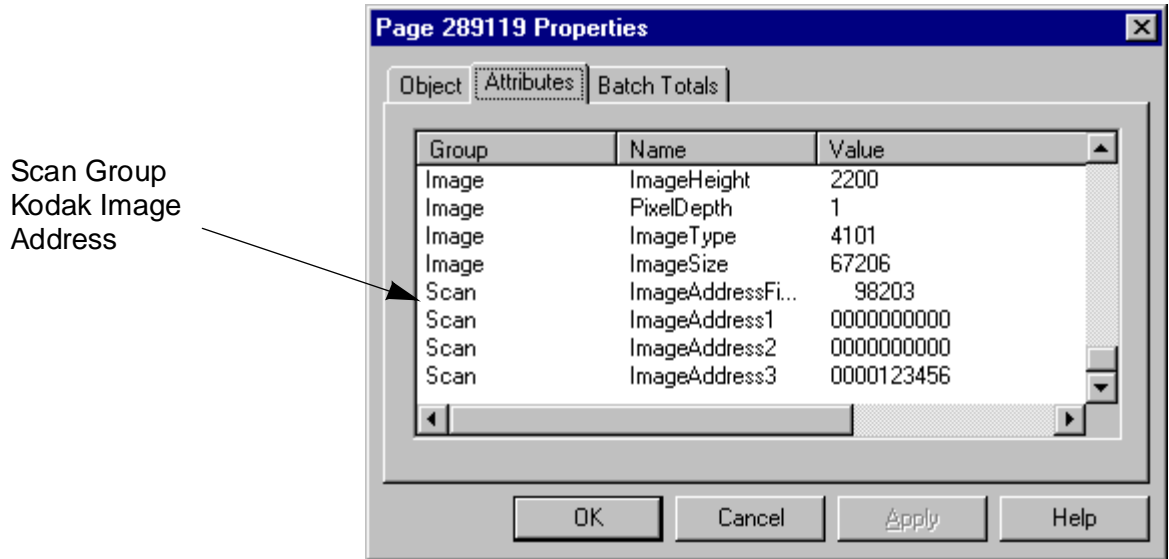
Capture can use the Kodak image address in all the ways that Capture can use any object property. Principally, the image address properties are used by or in automatic indexing and the Event Activator.

Autoindexing can use the property values from the image address to automatically fill values into index fields. For example, the value for ImageAddressFixed is today's date. The Date field in the Index Component is configured to use the value from the ImageAddressFixed property. At index run time, today's date is automatically put into the Date field.

For information about the Event Activator, see the Capture online help or the "Configuring the Event Activator" chapter in the *Panagon Capture Planning and Configuration Guide*.

Capture applies image address properties to page objects (as opposed to batch or document objects). To display image address properties, select a page from the TreeView or ListView, and select menu item File, Properties. In the Properties dialog box, click the Attributes tab and scroll down. Only pages scanned using a Kodak scanner can display the image address properties.

The next example shows the image address properties as they display in the Attributes tab. Note that all the Kodak image address fields are in the Scan Group, but that these properties are near the bottom of the list. The Scan properties are usually listed near the top.



The table below shows the image address properties, the type of counter the value represents, and gives comments about the property.

Group	Name	Value	Counter	Comments
Scan	ImageAddressFixed	Numeric or Alphanumeric	N/A	Field does not increment
Scan	ImageAddress1	Numeric	Field increments	Often associated with patch code 3
Scan	ImageAddress2	Numeric	Field increments	Often associated with patch code 2
Scan	ImageAddress3	Numeric	Field increments	Page counter

Organizing the scanned pages into folders, batches, or documents using patch codes requires configuration of the Event Activator. These

topics are beyond the scope of this document. For more information about working with batches, see the Capture online help. For more information about the Event Activator, see the Capture online help or the “Configuring the Event Activator” chapter in the *Panagon Capture Planning and Configuration Guide*.

### **Index Fields and Kodak Image Address**

When using a Kodak scanner, the image address properties are always added to the Capture page object. The values of the image address properties can be automatically inserted into index fields of the document at index run time. The values that go into the fields are configured by the Capture administrator. The list of index fields are obtained from the IDMISS document class. For example, when the document class has the following index fields to be automatically indexed:

Date\_yydd  
Claim\_Number

Then the image address values could be:

98203  
1234567

The index field names (Kodak field type in the example) and the index values correlate as in the table below. You will notice two other index fields and values. These are entered by the index operator at index time.

Index Field Name in the Document Class	Kodak Field Type	Index Values
Date_yydd	Fixed	98203
Claim_Number	Page counter	123456
Name_Last	N/A	Broadbent
Name_First	N/A	Dak

When the index component is properly configured and run, and the index operator types values into the manual entry fields, the result is:

The screenshot shows a grey background with four input fields. Each field has a label to its left and a small icon to its right. The labels are 'Date\_yydd', 'Claim\_Number', 'Name\_Last', and 'Name\_First'. The values entered in the fields are '1998203', '0000123456', 'Broadbent', and 'Dak' respectively. Two arrows point from the text 'Index Names from Document Class' to the labels 'Date\_yydd' and 'Name\_First'. Two arrows point from the text 'Index Value Fields' to the input boxes for 'Date\_yydd' and 'Name\_First'.

Date_yydd	1998203
Claim_Number	0000123456
Name_Last	Broadbent
Name_First	Dak

Index Names from Document Class

Index Value Fields



In the previous example:

**Date\_yyddd**

In the Date\_yyddd field, the value comes from the Index component Current Century field and scanner operator input. The century digits 19 are added by the Current Century feature. The 98203 day of year date comes from the ImageAddressFixed property. The scan operator enters this value on the scanner numeric keypad when starting the scan session. The Index component is configured to automatically put this value into the entry field. It is the full value, 1998203, that is stored.

Some selecting of characters using the Substring Start field and Substring Length field in conjunction with this date index field is necessary for proper seamless entry of date information. Selecting characters for automatic index strings is explained in the index configuration section in this document. The century digits from the Current Century field of the Index component are not considered for mask matching.

**Claim\_Number**

In the Claim\_Number field, the value comes from the ImageAddress3 property, which is the page counter field on the scanner. The Index component is configured to automatically put this value into the entry field. If desired, characters in this field can be selected to remove the zeros. Selecting characters for automatic index strings is explained in the index configuration section in this document.

**Name\_Last**

In the Name\_Last field, at index run time, the index operator manually types this value into the entry field.

**Name\_First**

In the Name\_First field, at index run time, the index operator manually types this value into the entry field, too.

## Before You Start

### Review the Configuration Worksheets

Print and fill in the configuration worksheets as you collect information and plan how you will implement automatic indexing. This will make the configuration process much easier. See [“Worksheets” on page 57](#).

### Collect Samples

Gather representative samples of the page or pages you want to process during production, for example, claim forms.

Scan at least one of these sample pages into the settings collection. Use a few sample pages as test pages when running the procedure to test that it behaves as you expect.

### Collect Kodak Scanner Information

Note the Kodak mode number and the image address format.

### Check Access to an IDMIS Repository

Verify you have a connection to an IDMIS server. Such a connection is required for indexing processes.

### Obtain a Usable IDMIS Document Class

Know the IDMIS document class or classes you plan to use. You must have the name of an indexable document class. An indexable document class is one for which at least one index field has been included.

If you do not know the document class to use, see [“Checking for a Usable Document Class” on page 22](#).

If a usable document class does not exist on the IDMIS, you must request that one be created, or create it yourself before you can continue. For more information about the creating document classes, see the *Panagon IDMIS System Administrator's Handbook*.

### **Match Mask Formats**

Match the mask formats for the scanner, IDMIS, and Capture. This is especially critical for seamless entry of date values into automatically indexed fields on Capture. The century prefix is not considered in mask matching.

### **Check Installed Components**

Verify the components you plan to use are installed. The Scan, Assembly and Index Capture components must be installed on the workstation.

### **Know Capture Naming Conventions**

Know and use any naming conventions devised for your Capture system. If none have yet been developed, below are some guidelines for naming configuration objects in Capture.

Keep in mind that as in IDMIS document class names, you only have a maximum of 18 characters for your settings collection, template, capture path, and user script names.

The names you use for the configuration objects should indicate object type, for example:

set\_XXXXX, tpl\_XXXXX, cph\_XXXXX, uss\_XXXXX

or, to save a character:

st\_XXXXX, tp\_XXXXX, cp\_XXXXX, us\_XXXXX

to save two characters:

s\_XXXXX, t\_XXXXX, c\_XXXXX, u\_XXXXX

suffixes could be used instead of prefixes:

XXXXX\_st, XXXXX\_tp, XXXXX\_cp, XXXXX\_us

The configuration object names should mirror document class name. For example, for a document class named Med\_Claim, a settings collection named set\_Med\_Claim is appropriate.

Scan settings collections can only be used with a particular scanner model. You cannot safely share the settings collections you create between multiple scanner manufacturers or different models from one manufacturer. A few methods to organize settings collections by scanner manufacturer and model are shown below.

- When your Capture system includes scanners from multiple manufacturers, use a capital letter in the configuration object name. For example, K for Kodak, F for Fujitsu, R for Ricoh, B for Bell & Howell, and so on. Following this example, st\_K\_Med\_Claim indicates a settings collection for a Kodak scanner and a document class for a medical claim.

- Consider using an abbreviated model number when your Capture system contains multiple machines from the same manufacturer. For example, the following shortened model names might be appropriate: 550 for a Kodak 5500, 923 for a Kodak 923, or 3093 for a Fujitsu 3093DE.
- When a Capture system contains both multiple manufacturers and multiple scanner modes, use both abbreviated manufacturer names and model numbers. For example, the following shortened names might be appropriate: K55 for a Kodak 5500, K9 for a Kodak 900, or H4c for Hewlett-Packard.

The parts we just mentioned in this section that might be included in the configuration object name are:

<b>Type</b>	<b>Type Example</b>	<b>Convention Example</b>
Object type	Template	tp
Scanner manufacturer	Kodak	K
Scanner model number	Hewlett-Packard 4c	4c
Mirrored document class name	Med_Claim	Med_Claim

Keep in mind the 18 character limit. It is easy to reach the maximum trying to define all the variables of a configuration object in its name. Keep it simple and only use what you really need to make the configuration object unique and representative of the type of configuration for which it is designed.

### **Know the Type of Indexing You are Implementing**

All Manual: Index operators will enter all index values.

Mixed Manual and Automatic: Some index entry fields will be filled manually by index operators, while others will be automatically filled.

Automatic Only: All index fields are automatically filled.

## Checking for a Usable Document Class

The IDMIS index fields that are key to an appropriately configured document class for indexing from an external index file are:

### **Mask**

For date information, this field defines the IDMIS output mask. It should be blank for display in IDM Desktop. For WFD, it should be in the desired format for display on that platform.

### **Maximum String Length**

For any field, the maximum string length must be as long or longer than the Capture input mask you plan to use. For example, for the Capture input mask MM/DD/YYYY, the Maximum String Length field must be 10 or more characters.

Ask the IDMIS system administrator to:

- Give you a list of the document class names that contain such fields. Once you have this information, you can begin the procedure. See, [“Outline of Steps” on page 25](#).
- Use the Database Maintenance feature to print copies or save files of the User Indexes Report and the Document Class Report. The topics following describe how to use these reports to find a usable document class. See the *IDMIS System Administrator's Handbook* for more information about these reports and how to create them.

## User Indexes Report

Look through the User Indexes Report for an index field. When you find an appropriate index field, note the name of the field. If more than one field meets the criteria, pick the most appropriate one.

Next is an example of one entry in the IDMIS User Indexes Report. It shows common entries for a date type index field. The name of the index, Date\_yydd, is also shown in the Document Class Report on the next page.

Name	: Date_yydd	Column Name	: A63
Index Type	: DATE	Mask	:
Retrieval Key	: NO	Menu Name	:
Upper Case	: NO	Maximum Size	:
Description	: Day of Year Date		

## Document Class Report

Now, look through the Document Class Report for the index field. When you find the index field, note the name of the document class or document classes in which the index field appears. Use this document class name when you create the settings collection in Capture.

Next is an example of Document Class Report. It shows common entries for an indexable document class. Indexable document classes have at least one field in the Indexes list at the bottom of the report. The name of the document class in the next example is Med\_Claim, which is shown in the Class Name field at the top left of the report.

```

Class Name       : Med_Claim           WorkFlo System      :
Pages/Document  : 1                   WorkFlo Queue       :
Batch Size      : 50                   Retention Disposition: DELETE
No. of Indexes  : 4                   Retention Base      : CLOSING DATE
Cluster Index   :                       Retention Offset    : 12
Disk Family     : SingleSlot           Enable Cataloging   : YES
Migrate to O.D.: YES                   Migration Delay     : NO
Description     : Medical Claim -- Short Form
  
```

Indexes	Required	Batch Total	Verify	Auto Indexing
-----	-----	-----	-----	-----
Date_yyddd	X			
Claim_Number	X			
Name_Last				
Name_First				



## Outline of Steps

Below are the general steps to setting up automatic indexing from Kodak image address. Note that the steps below provide only a summary of the procedure. For complete details, see the section referenced.

- 1 [“Create a Settings Collection and Template” on page 26](#). Use the Settings Wizard to create a settings collection and the Template Wizard to create a template in the Config folder on Capture. Both a settings collection and template are required to create a batch.

The settings collection is based on an indexable document class. Settings collections use properties from the document class. The settings collection takes a snapshot of the document class properties used by Capture. After the settings collection is created, the document class and settings collection are not automatically kept in synchronization. For more information, see the Document Class and Settings Collection sections in the “Overview” chapter of the *Panagon Capture Planning and Configuration Guide*.

- 2 [“Scan Sample Pages into the Settings Collection” on page 29](#). Scan at least one sample page into the settings collection you created in the Config folder. Configure and process the settings collection as you would want the production batches to be processed. Do not, however, assemble the settings collection.
- 3 [“Obtain Document Properties” on page 30](#). Be sure to know the source name assigned to the value or values you plan to use. This information is required to configure the Index Property dialog box.
- 4 [“Configure the Index Component” on page 34](#). In the settings collection, configure the index fields for automatic indexing.

- 5 [“Test the Settings Collection” on page 49](#). When you have configured the settings collection, test it to make sure that the process behaves as you expect.

## Create a Settings Collection and Template

To create a settings collection and template, you need to know:

Configuration Item	Example Value
IDMIS Repository Name	ntTaos
IDMIS Document Class Name	Med_Claim
Settings Collection Name	st_Med_Claim
Template Name	tp_Med_Claim

For a blank copy of this worksheet, see [“Settings Collection and Template Worksheet” on page 58](#).

This procedure for creating a settings collection and template provides only minimal information for that purpose. For a full discussion of creating settings collections and templates, see the other documents and online help provided with Capture.

- 1 Click File, New, Settings, to start the Settings Wizard. Then create a settings collection in the Config\Settings folder. Use an indexable document class from the IDMISS. The name can contain a maximum of 18 characters. Continue with the rest of the screens in this wizard. Click Finish when you are done.

Settings  
Collection  
Name

**FileNET Panagon Capture Settings Wizard**

Do you want to:

- Edit an existing Settings Collection
- Define a new Settings Collection

Edit existing Settings Collection

Name:

Define new Settings Collection

Name:

Based on existing Settings Collection:

< Back    Next >    Cancel

- 2 Click File, New, Template to start the Template Wizard. Then create a template using the settings collection that you just created. Give the template a name that mirrors the settings collection name. Template names cannot duplicate Settings Collection names. The name can contain a maximum of 18 characters. Continue with the rest of the screens in this wizard. Click Finish when you are done.

Template  
Name

**FileNET Panagon Capture Template Wizard**

Do you want to:

- Edit an existing Template
- Define a new Template

Edit existing Template

Name:

Define new Template

Name:

Based on existing Template:

< Back    Next >    Cancel

- 3 Check that the settings collection and template were created in the proper folder by using TreeView to open Config\Settings and Config\Templates and verify that the settings collection and template that you just created are there.

## Scan Sample Pages into the Settings Collection

This procedure makes properties available in the Source Group and Source Name fields. These fields are in the Assign Field Properties dialog box. The properties contain the index values needed for automatic indexing. These fields are used later in this procedure. Scan the sample pages into the settings collection you created earlier.

To scan sample pages into the settings collection, you need to know:

Configuration Item	Example Value
<i>Paper Sample Page</i>	<i>gather 1 or more</i>
IDMIS Repository Name	ntTaos
Settings Collection Name	st_Med_Claim
Kodak Mode Number	02
Image Address Format	yyddd.pppppp
Starting Image Address	98203.000001

For a blank copy of this worksheet, see [“Sample Page Worksheet” on page 59](#).

- 1 Select the settings collection you created in the Config\Settings folder.
- 2 Start a scan session and scan the sample page or pages into the settings collection.

To start the scan session, Click Tools, Start, Scan/ISIS on the Capture workstation. Initialize the scan session by selecting the mode and entering the starting image address information using the keys on the scanner panel. For example, enter 02 for the mode, and 98203.000001 or 98203.123456 for the starting image address. The format of these image addresses is yyddd.pppppp, which represents a 2-digit year, a 3-digit day of year, and a 6-digit page number.

---

**Caution** You must start the Capture Scan component before you enter the initial values using the keys on the scanner panel. Should you enter the values first, then start the Scan component, the values you just entered will be replaced by the default scan values from the settings collection.

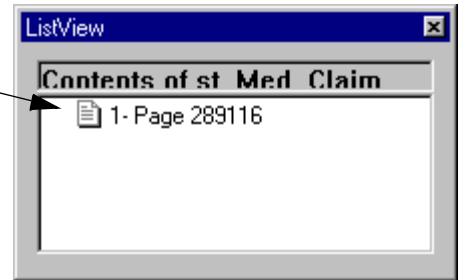
---

## Obtain Document Properties

The Page value, Source Group value and Source Name value are required to configure the Index dialog box. The steps below describe how to view and note the information and properties you need to configure the Index dialog box.

- 1 Select the first sample page in the settings collection using TreeView or ListView. The first sample page is the one at the top of the list of pages in the settings collection.

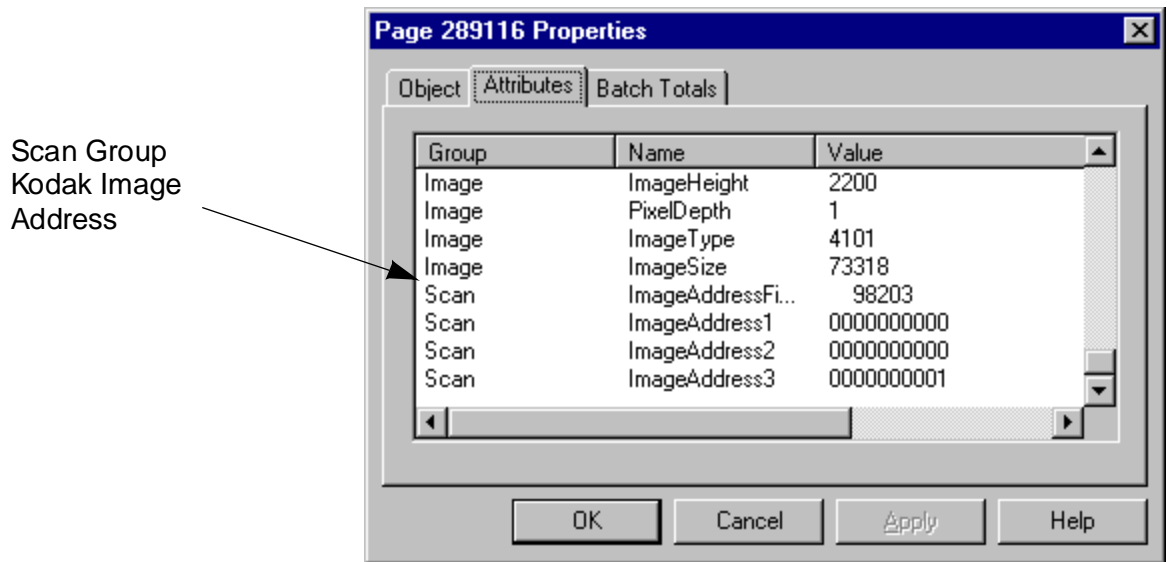
Sample Page



- 2 Select File, Properties. The Properties dialog box displays.
- 3 Click the Attributes tab. The properties of the page are shown in a table with the headings Group, Name and Value. An example of the Attributes tab dialog box is shown below.

- 4 Scroll down, looking in the Group column for the beginning of the second set of Scan entries, which will be near the bottom of the list, for example, Scan ImageAddressFixed 98203.

Note that in the example, image addresses 2 and 3 are zero filled, and have no values.



Fill in the fax property worksheet at the end of this document. For a blank copy of this worksheet, see [“Property Worksheet” on page 60](#).



An example of a completed worksheet is shown below. Use this information to configure the fields in the Index component for automatic indexing.

<b>Group</b>	<b>Name</b>	<b>Example Value</b>
Scan	ImageAddressFixed	98203
Scan	ImageAddress1	N/A
Scan	ImageAddress2	N/A
Scan	ImageAddress3	1234567

- 5 Click OK to close the dialog box.

## Configure the Index Component

The Index component is where most of the configuration is done for automatic indexing.

To configure the Index component General tab, you need to know:

Configuration Item	Example Value
Settings Collection Name	st_K_Med_Claim
Field Initialization -- Autoindex Values	<i>selected</i>
Process Documents Using Initial Values Above (I.E., Without User Input)	<i>cleared</i>
Enable Browsing Of The Document In The Viewer	<i>selected</i>

For a blank copy of this worksheet, see [“Index General Tab Worksheet” on page 61.](#)

To configure the Index component it helps to know:

Index Field Name	Index Method	Page	Group	Name	Example Value
Date_yyddd	Automatic	1	Scan	ImageAddressFixed	98203
Account_Number	Automatic	1	Scan	ImageAddress3	1234567
Name_Last	Manual	n/a	n/a	n/a	Broadbent
Name_First	Manual	n/a	n/a	n/a	Dak

For a blank copy of this worksheet, see [“Index Field Name List Worksheet” on page 62.](#)

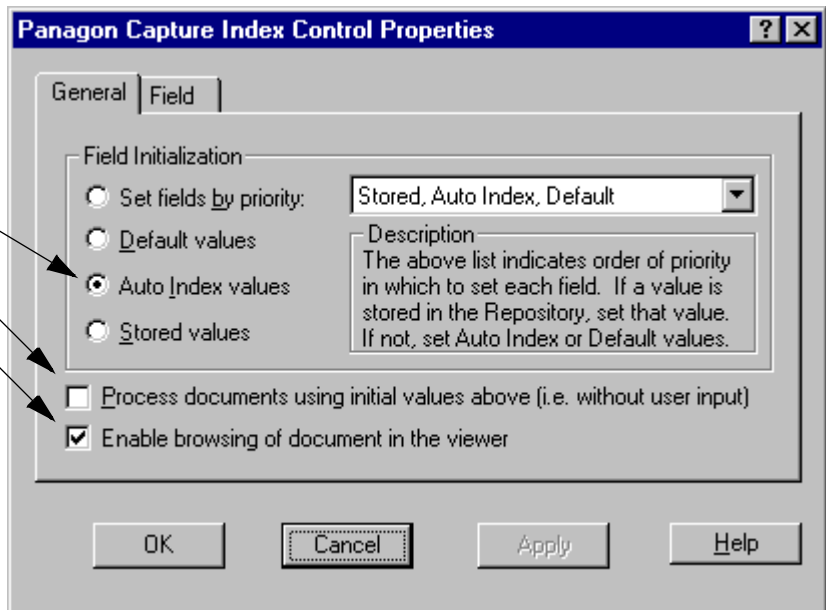
To configure the Index component Field tab, for each index field you need to know:

Configuration Item	Example Value
Index Field Name	Date_yyddd
Type	DATE
Display Name	Date_yyddd
Default Field Value	<i>n/a in example</i>
Disable Manual Entry Into This Field	<i>cleared</i>
Maximum Field Length ( <i>from IDMIS</i> )	
Input Mask Name	yyddd
Input Mask	#####
Current Century	<i>selected</i>
Example of Input Mask and Century	<i>1999203</i>
Update Display With Specified Page When Indexing This Field	<i>selected</i>
Page	1
Source Group	Scan
Source Name	ImageAddressFixed
Substring Start	5
Substring Length	5

For a blank copy of this worksheet, see ["Index Field Worksheet" on page 63](#).

- 1 Select the settings collection that contains the sample page or pages you just created in the Config\Settings folder.
- 2 Select Tools, Configure, Index. The Panagon Capture Index Control Properties dialog box displays.
- 3 Select the General tab. Choose the options listed below and shown in the screen example. Click the Apply button.

Use these values



### **Autoindex Values**

Click the AutoIndex Values radio button to select it. This gives precedence to automatically indexed values. Specifically, automatically indexed values are used first to populate the index database.

### **Process Documents Using Initial Values Above (I.E., Without User Input)**

Select this option if doing completely automated indexing (that is, no index values manually input by an index operator). However, when configuring the settings collection, it is often easier leave this field cleared.

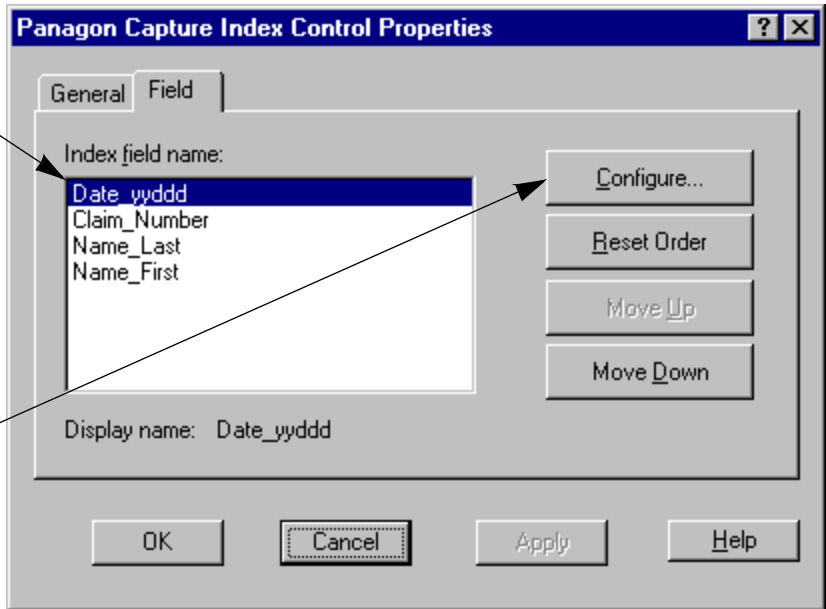
### **Enable Browsing Of The Document In The Viewer**

Select this option if an index operator will do manual indexing of any fields. With this option selected, the index operator can view all the pages in the batch by paging forward and backward. When configuring the settings collection, it is often easier to select this option.

- 4 Click the Field tab to give it focus.

Select the field to configure

Click Configure



- 5 Select an index field to configure. For example, select the Date\_yydd field to configure for ImageAddressFixed. ImageAddressFixed indicates the first line of the external index file. 98203 is the value (the day of year date) entered by the scan operator at the start of the scan session and is now available as a Capture property. Because the Current Century feature is used, it is the full date value (1998203), that will be stored when indexing is complete and the documents committed to the server.

**Tip** To speed keyboard entry at index run time, when configuring fields that mix manual and automatic index entry methods, put the manual fields at the top and the automatically indexed fields at the bottom. This way when the last manual field is typed and the index operator presses the Enter key, the page completes and the next page needing manual indexing displays.

---

The key information for configuring this field is shown in the table below:

Index Field Name	Page	Group	Name	Value
Date_yydd	1	Scan	ImageAddressFixed	98203

- 6 Click the Configure button. The Assign Field Properties dialog box displays. An example of the dialog box follows.

**Assign Field Properties** [X]

Index field name: Date\_yydd (REQUIRED)      Type: DATE

Display name:

Default field value:

Disable manual entry into this field

OK  
Cancel  
Help

Data Entry

Input Mask name:       Input Mask:

Current Century     

Special...

Page Specification

Page:        Update display with specified page when indexing this field.

Auto Index

Source Group:

Source Name:

Substring start:       Substring Length:

Append Auto Index String

Auto Index string:



- 7 Specify the options listed below as shown in the next example dialog box. Use the table you filled in earlier to help you enter the proper values in the Page, Source Group, and Source Name fields.

### **Disable Manual Entry Into This Field**

Leave this option cleared. Select this option only when you do automatic indexing exclusively, and do not want an index operator to make changes.

### **Input Mask Name**

Select a mask name that is appropriate to the type of field you are configuring.

Date Field Example: For Date\_yydd, select the Index Mask Name yyddd.

String Field Example: For a string field, select a mask that matches the format of the string field you want to index, such as Default STRING Input.

## Current Century

Current Century is not displayed for most fields, but is required for date type fields.

The Current Century field provides century prefixes for 2-digit year dates. The Current Century field is required for 2-digit year date masks, and disabled for 4-digit year date masks.

To use the current century, click the Current Century option. When selected, a 2-digit date mask uses the current century prefix based on the system date of the workstation.

To use a specific century, clear the Current Century option and type the century to use. When the Current Century option is cleared and a century value entered in the specified century field, Capture uses the specified century prefix.

The Current Century field does not affect the input mask. For example, in the field Date\_yydd, the mask used is yyddd (98203), but this displays as 1998203 in the entry field when index is run. It is the full date value, 1998203, that will be stored when indexing is complete and the documents committed to the server.

See the Current Century topic in the “Configuring Indexing” chapter of the *Panagon Capture Planning and Configuration Guide* or the Capture online help for more information.

## Page

Select the page number that contains the properties that you want to index. The page numbers are in the order that the sample pages were scanned into the settings collection. For example, select 1 if the page that contains the properties you want is the first sample page in the settings collection.

If you have more than one sample page in your settings collection, the numbers would continue 2, 3, 4, and so on. When using more than one page, start from the top of the list and work down on subsequent passes through the Configure the Index Component procedure.

The page number, Source Group, and Source Name are used together to create the autoindex string. The values for Source Group and Source Name are selected in the next steps.

---

### Note

Several different separators can also display in the Page field, and function in much the same way as the page numbers in creating the autoindex string. When separators are used, you see one or more of the following page identifiers displayed above the numbers in the Page field: DOCSEP, BATSEP, FLDSEP. The separator values represent document separator, batch separator, and folder separator respectively.

Using separators of any kind requires the configuration and use of Event Activator. See the chapter “Configuring the Event Activator” in the *Panagon Capture Planning and Configuration Guide* for more information.

---

## Update Display With Specified Page When Indexing This Field

Select this option to display the page specified in the Page field when you are indexing a field. For example, with this option is selected, when the index operator indexes the field Name\_Last, page 1 of the current document displays. This assumes that this index field is associated with page 1 of the settings collection sample pages.

### Source Group

In the Source Group field, click the drop down list to display the available Source Group names, and select Scan.

### Source Name

Refer to the table you filled in earlier to help you enter the proper values in the Page, Source Group, and Source Name fields.

In the Source Name field, click the drop down list to display the available Source Name names, and select the image address property appropriate for the index field you are configuring. For example, when configuring index field Date\_yyddd, select ImageAddressFixed, which will put the value of 98203 into the index field when the Index component is run. When configuring index field Account\_Number, select ImageAddress3, which will put the value of 123456 into the index field at index run time.

Normally, this is the last of the fields that are used together to build the autoindex string. Page, Source Group, and Source Name are used in the configuration of every index field you want to automatically index. However, in the example, configuring index field Date\_yyddd requires the configuration of a couple of more fields: Substring Start and Substring Length.

For the day of year field as in the example, you need to select only certain characters of the value in the ImageAddressFixed field. Although it is not visible in the Attribute tab, and the field appears to be more or less centered in the column, the ImageAddressFixed field is zero-filled from the left. In the example, for the 5-digit day of year date, the substring starts at character 5 for a length of 5 characters. Specifying the substring in this way will cause the index component to properly display the example date in the entry field as 1998203. The 19 is from the Current Century field, which is automatically enabled for 2-digit year dates. It is the full date value, 1998203, that will be stored when indexing is complete and the documents committed to the server.

### **Substring Start**

The Substring Start field is optional for most fields, but is required for day of year as configured for Date\_yydd in the example. The value in the example is 5.

### **Substring Length**

The Substring Length field is optional for most fields, but is required for day of year as configured for Date\_yydd in the example. The value in the example is 5.

- 8** Click the Append Autoindex String button.

This action copies the selected properties from the Page field, Source Group field and Name field to the Autoindex String field building the autoindex string. In the example, the values from the Substring Start field and the Substring Length field are also copied. The entry, <1.Scan.ImageAddressFixed.5.5>, displays in the Autoindex String field for the

first index field being configured. The table below shows the meaning of this entry.

<b>Page Number</b>	<b>Source Group value</b>	<b>Source Name value</b>	<b>Substring Start Char.</b>	<b>Substring Length in Chars.</b>
1	Scan	ImageAddressFixed	5	5

In the Autoindex String field, autoindex strings can be:

- Edited manually, if you know exactly what should be entered there
- Deleted manually, by highlighting the unwanted text and pressing the Delete key on the keyboard
- Built from several, smaller index items

The Assign Field Properties dialog box should now be configured as shown in the example that follows. The Source Name Value number may differ from the example depending on which index field you are configuring.

**Assign Field Properties** [X]

Index field name: Date\_yydd (REQUIRED)      Type: DATE

Display name:

Default field value:

Disable manual entry into this field

OK  
Cancel  
Help

Data Entry

Input Mask name:

Input Mask:   Current Century

Special...

Page Specification

Page:   Update display with specified page when indexing this field.

Auto Index

Source Group:

Source Name:

Substring start:

Substring Length:

Append Auto Index String

Auto Index string:

- 9** Click OK to close the Assign Field Properties dialog box.
- 10** To configure more index fields, repeat steps 5 through 9 for each field that you want to configure for automatic indexing.
- 11** Click OK to close the Panagon Capture Index Control Properties dialog box.



## Test the Settings Collection

Because so many aspects of the Capture product must come together properly, you should test your configuration efforts. This procedure gives a simple way to superficially test your configuration. The names you use in the test are up to you.

To test the settings collection, you should know:

Configuration Item	Example Value
<i>Paper Sample Page</i>	<i>gather 3 to 10</i>
IDMIS Repository Name	ntTaos
Folder Name	A_Test
Template Name	tp_Med_Claim
Batch Name	A_Test_Batch
Kodak Mode Number	02
Image Address Format	yyddd.pppppp
Starting Image Address	98203.000001
Assembly -- Force Document To Contain The Number Of Pages	<i>selected</i>
Assembly -- Pages Per Document	1

For a blank copy of this worksheet, see ["Test Worksheet" on page 64](#).

- 1 Select the IDMIS repository and create a folder, for example, A\_Test.

When the folder is first created it will sort at the bottom of the list of folders. To place the folder you just created in its proper sort order, select the repository object, click Edit, Refresh.

- 2 Select the folder you created and create a batch based on the settings collection and template, for example, A\_Test\_Batch.

---

**Caution** Be sure to create and select the batch you just created. Do not run this test on the settings collection you created in Config\Settings. Running this test procedure on the settings collection will make the settings collection nonfunctional.

---

- 3 Select the batch you just created, for example, A\_Test\_Batch.
- 4 Select Tools, Configure, Scan. The Panagon Capture Scan Properties dialog box displays.

- 5 Start a scan session and scan the test pages into the settings collection.

To start the scan session, Click Tools, Start, Scan/ISIS. Initialize the scan session by selecting the mode and entering the starting image address information using the keys on the scanner panel. For example, enter 02 for the mode, and 98203.123456 for the starting image address.

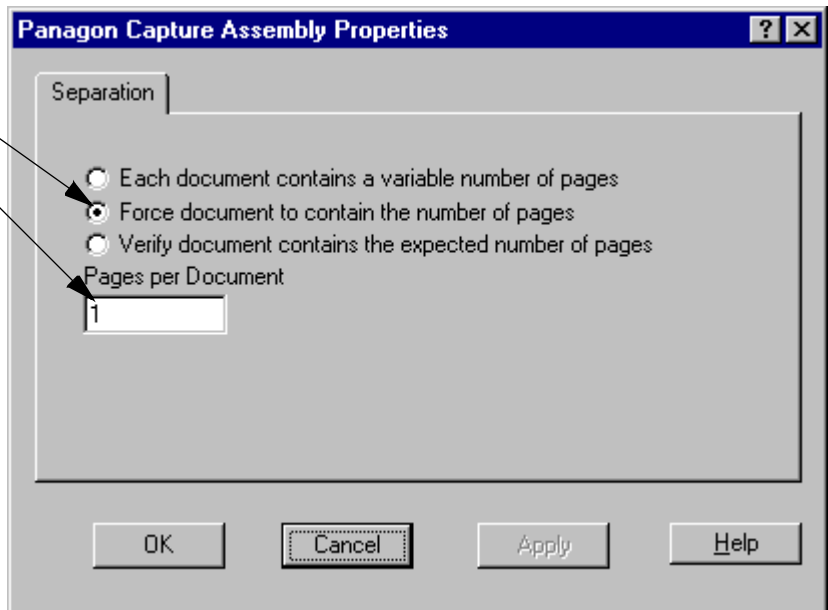
---

**Caution** You must start the Capture Scan component before you enter the initial values using the keys on the scanner panel. Should you enter the values first, then start the Scan component, the values you just entered will be replaced by the default scan values from the settings collection.

---

- 6 Select the batch and click Tools, Configure, Assembly. The Panagon Capture Assembly Properties dialog box displays. For the test, configure the dialog box as described here and shown in the dialog box example below.
- Select Force Document To Contain The Number Of Pages
  - Specify Pages Per Document as 1.

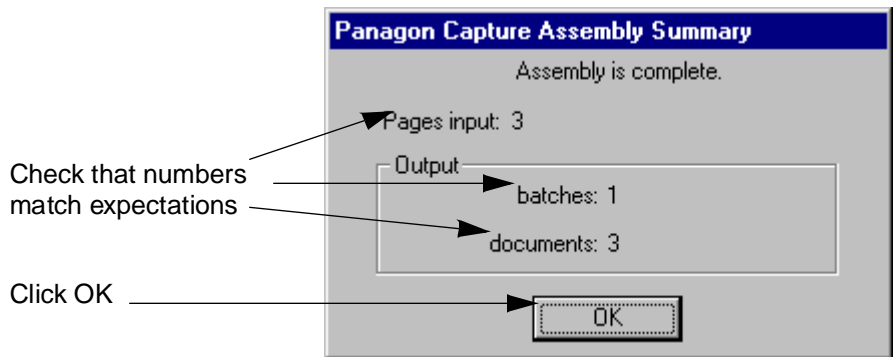
Use these values



- 7 Click Tools, Start, Assembly. An hourglass displays while Capture assembles the batch. Depending upon the size of the batch and the speed of your processor, this can take some time.

When the assembly is finished, the Panagon Capture Assembly Summary message box displays. The message shows how many pages were assembled, and how many batches and documents were created.

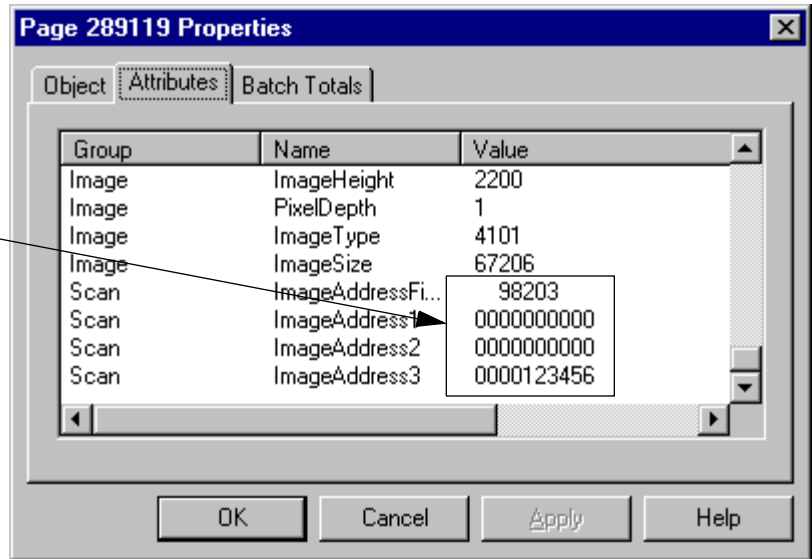
Check that the numbers match the numbers you expected.



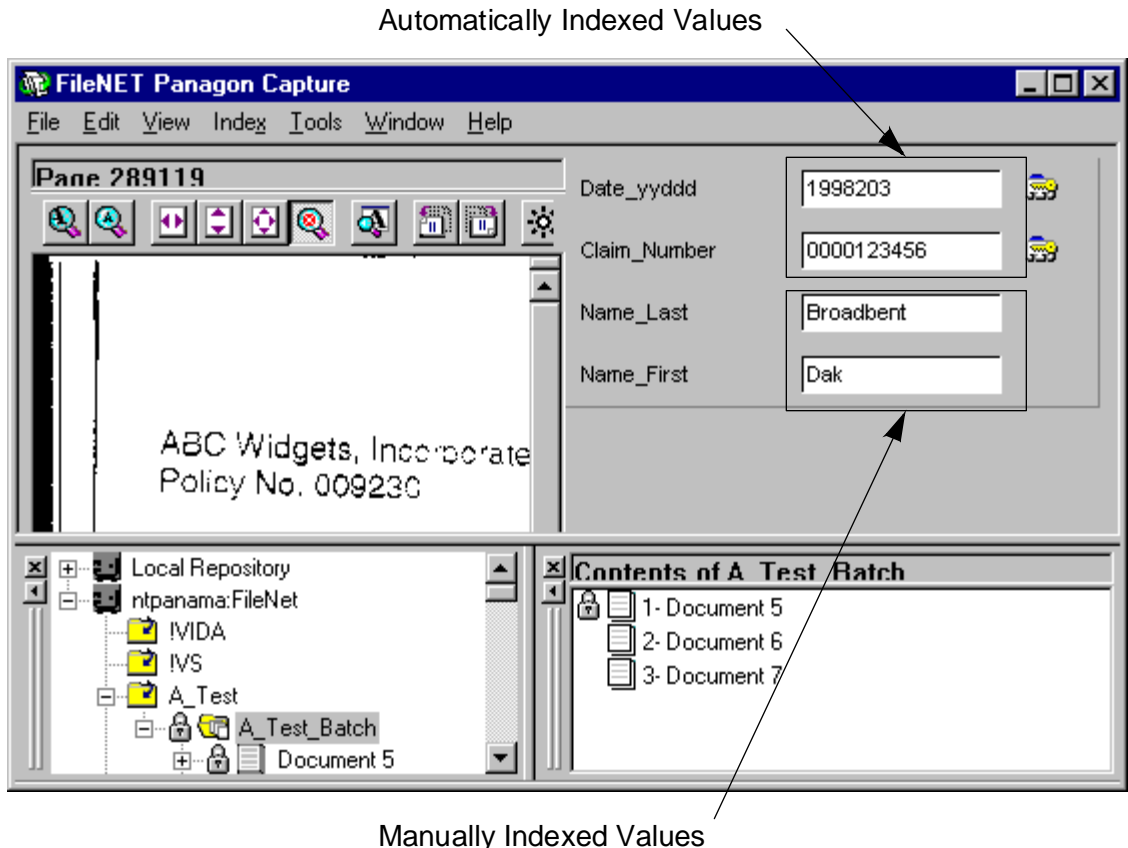
- 8 Click OK to clear the message.
- 9 Using the TreeView, spot check some of the pages in the batch and documents that were assembled. Double-click on a page to display it.

- To view properties, select the page, right mouse click to open the context menu, left click Properties, and left click the Attributes tab. Verify that the properties you expect display in the table. Then, close the Properties dialog box.

Check that values in  
Scan Group,  
Image Address Name  
match expectations

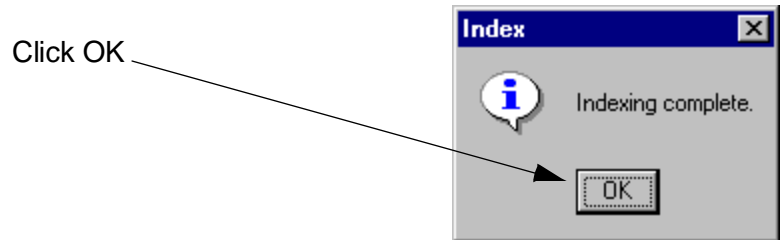


- 11 Select the assembled batch and click Tools, Start, Index. The index fields display with the external index file information automatically inserted in the index fields. The result is shown in the example below.



Type values into any entry fields that are manual entry fields. Often, the Capture administrator configures the manual entry fields to display at the top of the list to increase manual indexing efficiency.

Press Enter or Tab to move from field to field. Press Shift-Enter to move the next document. When you press Enter in the last field of the last document in the batch, the Index Complete message box displays.



- 12 Click OK to clear the message.



## Worksheets

The blank worksheets provided in this section are for your use and are to be printed and filled with the information for your site and configuration. The worksheets are generally presented in the order that they are needed during the procedure. Depending on how you plan to configure your site, you may need to complete several copies of a given worksheet.

Reviewing the worksheets before starting the procedure can familiarize you with the information you will need.

## Settings Collection and Template Worksheet

Configuration Item	Value
IDMIS Repository Name	
IDMIS Document Class Name	
Settings Collection Name	
Template Name	

## Sample Page Worksheet

Configuration Item	Value
<i>Paper Sample Page</i>	<i>gather 1 or more</i>
IDMIS Repository Name	
Settings Collection Name	
Kodak Mode Number	
Image Address Format	
Starting Image Address	

## Property Worksheet

<b>Group</b>	<b>Name</b>	<b>Value</b>
Scan	ImageAddressFixed	
Scan	ImageAddress1	
Scan	ImageAddress2	
Scan	ImageAddress3	

## Index General Tab Worksheet

Configuration Item	Value
Settings Collection Name	
Field Initialization -- Autoindex Values	
Process Documents Using Initial Values Above (I.E., Without User Input)	
Enable Browsing Of The Document In The Viewer	

---

## Index Field Name List Worksheet

Index Field Name	Index Method	Page	Group	Name	Example Value

---

## Index Field Worksheet

Configuration Item	Value
Index Field Name	
Type	
Display Name	
Default Field Value	
Disable Manual Entry Into This Field	
Maximum Field Length ( <i>from IDMIS</i> )	
Input Mask Name	
Input Mask	
Current Century	
Example of Input Mask and Century	
Update Display With Specified Page When Indexing This Field	
Page	
Source Group	
Source Name	
Substring Start	
Substring Length	

---

## Test Worksheet

Configuration Item	Value
<i>Paper Sample Page</i>	<i>gather 3 to 10</i>
IDMIS Repository Name	
Folder Name	
Template Name	
Batch Name	
Kodak Mode Number	
Image Address Format	
Starting Image Address	
Assembly -- Force Document To Contain The Number Of Pages	
Assembly -- Pages Per Document	



# Index

## A

automatic indexing only 21

## B

before you start 18

## C

century, current 42

check

    access to IDMIS repository 18

    collect samples 18

    installed components 19

    obtain name of usable document  
        class 18

checking for usable document class 22

collect sample pages 18

collect scanner information 18

configuration worksheets 57

configuration worksheets, review 18

configure Index component 34

conventions, naming 19

counter fields, optional 9

create settings collection and template 26

current century 42

## D

document class

    check for a usable one 22

    report 24

document properties, obtain 30

## F

fixed field 8

format, mask 19

## G

general steps 25

    configure Index component 34

    create settings collection and  
        template 26

    obtain document properties 30

    scan sample pages 29

    test settings collection 49

## I

IDMIS repository, check access to 18

image address

    and index fields 15

    fields 10

    properties 13

    what is it? 7

index

    append autoindex string 45

    autoindex values 37

    current century 42

    disable manual entry into this field 41

    enable browsing of the document in the  
        viewer 37

    Field tab 38

    General tab 36

    input mask name field 41

    page field 43

- process documents using initial values 37
- source group field 44
- source name field 44
- substring length 45
- substring start 45
- update display with specified page when indexing this field 44

Index component, configure 34

index fields and Kodak image address 15

indexing, type of 21

installed components, check 19

**K**

Kodak image address and index fields 15

Kodak levels 10

**L**

length, of substring 45

levels 10

**M**

manual indexing 21

mask, match formats 19

match mask formats 19

mixed indexing 21

**N**

name of usable document class 18

naming conventions 19

**O**

obtain properties 30

optional counter fields 9

outline of steps 25

overview 6

**P**

page counter field 8

prerequisites 18

procedure outline 25

properties

- Attributes tab 30
- from image address 13
- obtain 30
- table of properties

  - example 34, 62

**R**

report

- document class 24
- user indexes 23

repository, check access to 18

**S**

sample pages

- collect 18
- scan 29

scan sample pages 29

scanner information, collect 18

separators 43

settings collection

- create 26
- scan sample pages 29
- test 49

start

- before you 18
- of substring 45

steps, outline of 25

substring

- length 45
- start 45

**T**

template, create 26  
test settings collection 49  
type of indexing 21

**U**

usable document class, obtain name of 18  
user indexes report 23

**W**

worksheets 57  
    index field 35, 63  
    index field name list 34, 62  
    index general tab 34, 61  
    property 33, 60  
    review before starting 18  
    sample page 29, 59  
    settings collection and template 26, 58  
    test 49, 64