



Document Indexing/Cataloging

Drawer

The first hierarchical level of organization for Perceptive Content documents. A drawer is used to separate documents into logical categories. In addition to providing a distinct level of organization, you can use drawers to assign or deny access to particular documents and folders.

Document Keys

These keys are Perceptive Content document index keys. The values in these index keys are used by Perceptive Content to store and retrieve scanned documents. In Standard Indexing Schema, the information used in these keys helps to uniquely identify each document. In Content Modeling Indexing Schema, these keys are additional information used to easily search for the document. These keys are labeled as: Drawer, Field1, Field2, Field3 or F3, Field4 or F4, Field5 or F5, and Document Type/Type.

Document Type

A document key that categorizes a document according to a predefined list of values, which makes it similar to the drawer document key

Document Type Lists

Document type lists are used throughout Perceptive Content to group sets of document types together. Document type lists let you provide users with a filtered view or subset of the entire list of defined document types.

Standard Index Schema

The indexing schema that uses the seven Document Keys (Indexes) to uniquely identify documents.

Unique ID

Perceptive Content has the ability to generate a Unique ID number for a document key. Defining a document key as Unique ID ensures uniqueness within the document cabinet.

Custom Properties

Property fields that end-users can populate with data relating to a Perceptive Content document or project. There are seven data types in a custom property – Composite, Date, Flag, List, Number, String and User. All custom properties can have default values that populate custom properties initially. All custom properties can contain NULL (empty) values.

** See Date, Flag, List, Number, String and User for additional information on custom property data types.*

Date

A custom property data type. The date stored as a string. The displayed date and time format is based on the settings chosen when the custom property was created.

Flag

A custom property data type. This data type is always stored as TRUE (1) or FALSE (0). The values that display are based on the settings chosen when creating the custom property.

List

A custom property data type. This data type creates a group of values that a user can select from a list box for the custom property.

Number

A custom property data type. Decimal data type display format: Number fields that support both positive and negative numbers up to a limited number of digits. Zeros to the right of the decimal are suppressed.

Currency data type display format: Number fields that display as currency defined using one of the ISO 4217 country codes. The default currency setting matches the local settings of the Perceptive Content Client computer.

String

A custom property data type. Text fields that support all printable ASCII characters within the Single Byte character set.

Host Application

The information system or program that is used to track and manage records that pertain to business process.

Application Plan

Perceptive Content stores the information learned, using LearnMode on a host application, in a container called an application plan. An application plan contains one or more screens, where each screen represents a learned screen or window in a host application.

LearnMode

A client-side, non-programmatic method of integrating a host application with Perceptive Content and learning screens or windows within that application.

LearnMode Type

There are eight types that can be used to learn a host application - Window Walker, HyperLearn, Window Text, DOS Command Prompt, Terminal Capture, Manual Entry, Internet Explorer and OLE/DDE Script.

Manual Entry

This LearnMode type is used to create a stand-alone application plan. In special situations, Perceptive Content can be set to run as a stand-alone imaging system. In this case, images can be indexed and retrieved without the use of a business application. Screens in these application plans have one of two uses. The first use is to operate as an alternative to another dynamic LearnMode application plan. The second use for this method is the complete absence of a business application that is relevant to the images you are storing.

Scanning/Capture

Barcode

Barcodes are a series of vertical bars that represent alpha and numeric characters. Administrators can use barcodes to separate documents into batches, to group large collections of documents together, or to auto-index your documents. In the Perceptive Content Client, barcodes are configured in a capture profile.

Patchcode

Used to create a new batch when it is detected by the scanner.

Batch

A batch generally refers to a stack of paper documents that are scanned at the same time.

Batch ID

Each batch that gets created in Perceptive Content is assigned a unique number or Batch ID. This number is recorded and can be used as part of the document key.

Batch Mode

Part of a capture profile – mode setting. Setting this mode allows users to capture documents in a group and upload them to the Perceptive Content Server to eventually be processed.

CaptureNow

A central Perceptive Content feature that lets users scan and import documents from multiple sources into Perceptive Content. In the capture profiles you define for your organization's scanning technology, you set up and store all the options you need to obtain precise images and other documents in Perceptive Content.

Capture Profile

A reusable collection of settings that makes capturing a single-click task. The profile stores all the options users need to capture and conduct related processing tasks with Perceptive Content Client. The scanning options in a capture profile includes a source that designates where you are capturing documents from (File, Scanner, Printer) and the mode in which you want to capture (Single, Batch, Package). A capture profile also contains options for document indexing, routing a captured document to a workflow queue, and image processing.

Scanner

Part of a capture profile – source setting. This source lets users load paper (or other items) into the appropriate scanning device. The device will capture the items and load them into Perceptive Content.

Image Processing

Image processing allows for scanned images to be manipulated either to improve quality of the incoming image, or to gather data from the image itself.

VRS – Virtual ReScan

A Kofax product that inspects multiple points of each document. This inspection enables Virtual ReScan to check and correct the alignment (skew), brightness, contrast, and image clarity to ensure that Perceptive Content documents are clear and readable at the time of scanning.

QA – Quality Assurance

Quality assurance is the first step in processing documents after you scan or import them. During QA you verify that a document meets the standards of image quality that you require to store, view, and work with that document online.

Link

A process of creating an association between captured objects inside Perceptive Content and records inside a host application. Sometimes referred to as “linking”.

ImageNow Printer

Part of a capture profile – source setting. This source lets users import a document, convert into a TIFF file, and bring it into Perceptive Content without having to scan it first. Import the document using the Print button within the software program that is displaying it.

Import Agent

Responsible for handling all automated import routines on the server.

Basic Functions

Perceptive Content Explorer

Perceptive Content Explorer lets you navigate through all of the grids, such as Batches, Documents, Projects, Workflow, and Tasks, from the same window.

Perceptive Content Viewer

Allows users to view batches, documents, and workflow items in a single viewer.

Thumbnails

The Thumbnails pane displays a miniature view of each page of the active document. Double-clicking a thumbnail displays its contents in Perceptive Content Viewer.

Views

A set of documents or projects that are selected and displayed according to the view definition that is created for users. After you have created a view definition, you can assign one or more of the View privileges (Access, Filter, or Manage) to specific users or groups or both. When the users open Perceptive Content Explorer, they see only the views to which you have granted them access.

Filter

A filter lets you select a predefined subset of documents or projects from its parent view and simplifies the task of processing a large number of rows in a view. As soon as you click a filter, Perceptive Content applies the filter to the view and displays the results in the grid.

Quick Search

A quick search applies a single condition to the documents in the current view and returns the documents or projects that satisfy that condition. You define the condition in the Quick Search tab, which includes the property list, operator list, and value box, and the Go button, shown below.

Annotation

A way to mark up and comment on a document object without affecting the original image. The following are types of annotations in Perceptive Content: Digital Signature, Stamp, Sticky Note, Text, Highlight, Check, Pen, Line, Arrow, Rectangle, Oval, OLE, URL and Redaction.

Arrow

An annotation that lets a user draw an arrow on a document image.

Check

An annotation the lets a user add a check mark to a document image

Highlight

An annotation that lets a user highlight an area on a document image.

Line

An annotation that lets a user draw a line on a document image.

Oval

An annotation that lets a user place an oval on a document image. The oval annotation can appear hollow or filled, depending on the appearance defined in the annotation template.

Pen

An annotation that lets a user draw on a document image.

Rectangle

An annotation that lets a user draw a rectangle on a document image. The rectangle annotation can appear hollow or filled, depending on the appearance defined in the annotation template.

Redaction

Redaction is the act of removing sensitive, private, or confidential information from a document in a way that hides that information without distorting the meaning of the document.

Stamp

An annotation lets a user stamp predefined (Approved, Confidential, Rejected, and so forth) or custom messages on document images.

Sticky Note

An annotation that lets a user add small notes to document images.

Text

An annotation that lets a user place text on document images.

Workflow

Workflow

Workflow lets you automate business processes and create review checkpoints. After you have saved a document in Perceptive Content, the document can be routed through any number of queues, which might represent different departments or different desks within a department. It is also a button on the main Perceptive Content toolbar. Clicking this button lets the users display the Perceptive Content Explorer and any workflow queues that the user has access.

Process

A series of tasks and rules reflecting the review path a document item must take to meet the sign off and approval requirements of your work group. Queues and routes are the basic building blocks of a workflow process.

Item

A workflow item is the base component of workflow. A workflow item references a specific document or project within Perceptive Content. A workflow item is routed from queue to queue until it reaches its destination.

Queue

Similar to an inbox. There five different types of workflow queues: Work, System, Super, Join and Complete.

Work Queue

A Work queue is a queue that is assigned to one or more users who are performing the same action upon the same workflow items within the queue.

Super Queue

This type of queue redistributes workflow items to a collection of distinct queues that perform the same workflow function. These sub queues reduce the number of alarms, routes, and rules needed.

System Queue

This type of queue performs an action that does not require user intervention. For example, a queue that automatically prints documents. The action is usually performed with a rule or script.

Complete Queue

This queue property sets the queue as the final queue in a process. Any work, system, or super queue is allowed to be a complete queue.

Route

A defined path between queues. There are six different types of routes: Sequential, Sequential Auto, Parallel, Conditional, Parallel Conditional and Inter-process.

Sequential Route

A sequential route is a clearly defined route with little variation. One action must be completed before the workflow item is routed to the next queue. Manual routes are used when there is more than one queue an item might be routed to next. It requires the user to select the destination queue from the available routes list.

Sequential Auto Route

A sequential auto route is a clearly defined route with no variation. One action must be completed before the workflow item is routed to the next queue. Automatic routes require no additional user interaction after the Route button is clicked. There is only one queue the item can route to next, so it is automatically sent to that queue.

Conditional Route

A conditional route is a route that is determined by rules that occur dynamically in the process. The next queue in the process is determined by information received by the workflow process.

Default Route

In workflow, a user may have multiple routes to choose from when routing items. As an administrator, a default route can be configured in on the Routes tab of Queue Properties so the most commonly used route will be highlighted for selection. However, if another route is desired, users will still have the ability to choose another route.

Routing Rule

A rule that contains a condition, action and exception. If the set condition or exception has been met, this will trigger an action – a route. A specific queue where an item is routed must be set.

Alarms

Can alert one or more users of a critical task that needs to be performed or that is now ready to be performed. There are four different alarm types – email, Perceptive Content icon, message center and audible.

Alarm Rule

A rule that contains a condition, action and exception. If the set condition or exception has been met, this will trigger an action – an alarm.

Archiving

The ability to retain workflow history when the workflow item has been removed from workflow.

Security

Security

Allows Perceptive Content administrators to manage user and group privileges by allowing or denying access to areas within the product.

Privilege Hierarchy

Perceptive Content evaluates all privilege assignments at the user level. When user privileges and group privileges are different or when a user belongs to several groups in which the privilege assignments differ, Perceptive Content applies privilege hierarchy rules to resolve the privilege. User privileges are higher priority than group privileges, and that deny privileges are higher priority than allow privileges.

User

A person that has been created in Perceptive Content. They can perform functions to which they are assigned through privileges. Users can belong to none, one or many groups.

Groups

Groups are used to streamline the task of assigning standard sets of privileges to large numbers of users.

User Authentication

To login to Perceptive Content, the user must pass through two stages: authentication and authorization. The first stage, authentication, is the process of validating the user name and password that the user provides. After the user is authenticated, the user must pass through the next stage, authorization. Authorization has two processes; the first is determining if the user is a registered user of Perceptive Content and the second is the process of determining which documents the user can access and what operations the user can perform.

Auditing

A way to troubleshoot issues or track the actions taken in Perceptive Content by specific users or groups.