

# ASCENT CAPTURE



## Batch Class Setup Quick Reference

- 1 Set up field types:** Right-click the “Field Types” tab area and select “New Field Type.”

Setup Options	Description
Name	Name of field type
Data type	Denotes string, numeric, or date/time field type
Dictionary	Specifies OCR dictionary name (optional)
Values	Default values displayed in drop-down box in Validation module (optional)

- 2 Set up document classes:** Right-click the “Document” tab area and select “New Document Class.”

Setup Options	Description
Name	Name of document class
Index fields	Specifies the data fields used for this document class. Attributes include: <ul style="list-style-type: none"> <li>• Name The field name displayed to the validation operator</li> <li>• Field Type The field type associated with this field</li> <li>• Default Default value displayed in the field (optional)</li> <li>• Required Specifies if the field must be filled in at validation time</li> <li>• Verify Specifies if this field goes through Verification queue</li> <li>• Hidden Specifies if field is hidden from validation operator</li> <li>• Sticky Specifies if entered value is carried from document to document</li> <li>• Total Specifies if field is used for batch totaling</li> </ul>
OCR full text	Specifies if full text OCR is applied to each page in the document
Database validation	If desired, enable database validation. Right-click a document class and select Database Validation from the context menu.

- 3 Set up form types:** Right-click a document class on the “Document” tab and select “New Form Type.”

Setup Options	Description
Name	Name of form type
Fixed # of pages	Specifies whether the form always has the same number of pages
Permanent image cleanup	Specifies image cleanup settings that will be applied permanently to the entire form. (This cleanup is performed in the Recognition Server queue.)
Page registration	Minimum confidence for a page to be considered correctly matched against its corresponding sample page. By default, it occurs for pages with index zones.
Auto index field recognition	Specifies the threshold for distinguishing between a confident and non-confident field. Applies to all zones on the form for which data is auto-recognized, such as OCR, ICR, etc.
Page level bar code	Specifies bar code type if page level bar code is used (right-click on “Page Level Bar Codes” under the sample page to enable this option)

**4 Set up sample pages:** Right-click a form type on the “Document” tab and select “Add Sample Pages.”

Setup Options	Description
Index zones	<p>Click the “Create Index Zone” button on toolbar and draw zones on the sample page. Specify the following as desired for each zone:</p> <ul style="list-style-type: none"> <li>Field The field associated with this zone</li> <li>Auto recognition Specifies if auto recognition used</li> <li>Recognition profile Specifies recognition type (OCR, ICR, OMR, or bar code), recognition options, and image cleanup (despeckle, etc.)</li> <li>OMR options Overrides confidence threshold and specifies return values for OMR zones. (optional)</li> </ul>
Registration zones	<p>Click “Create Registration Zone” button on toolbar and draw zone on the sample page.</p> <ul style="list-style-type: none"> <li>Recognition profile Same as above</li> <li>Search text The text string on which to register the page</li> </ul>
Separator zones	<p>Click “Create Separator Zone” button on toolbar and draw zone on sample page. Options are the same as registration zones, with one addition:</p> <ul style="list-style-type: none"> <li>Confidence Minimum confidence level for success</li> </ul>
Form ID zones	<p>Click “Create Form ID Zone” button on toolbar and draw zone on sample page. Options are the same as separator zones.</p>
Group zones (for grouping index zones)	<p>Click “Group Zone” button on toolbar and draw zone on sample page. Specify options:</p> <ul style="list-style-type: none"> <li>Validation display Specifies if the entire group of zones or the most confident in the group is displayed to validation operators</li> <li>Values in result The expected number of values to be returned</li> <li>Result set Return most confident or a delimited string containing all values</li> </ul>

**5 Set up batch classes:** Right-click the “Batch” tab area and select “New Batch Class.”

Setup Options	Description
Name	Name of batch class
Priority	The default priority of the batch class (1 is highest, 10 is lowest).
Image folder	The temporary image storage folder for in-process batches.
Batch fields	Specifies batch fields. Options are similar to index fields.
Queues	<p>Specifies which queues the batch will go through. Queues include:</p> <ul style="list-style-type: none"> <li>Scan Scan/import, scan-time image cleanup, endorsing</li> <li>Quality Control Rescan endorsing, review requirements</li> <li>Recognition Server No options</li> <li>Validation Allow/deny batch editing by validation operator</li> <li>Verification Blind data entry, independent verification</li> <li>OCR Full Text No options</li> <li>Release Release timing (immediate vs. timed)</li> </ul>
Separation and form ID	Sets options for document separation (via patch codes, bar codes, or page recognition) and form ID (manual, separator sheets, or page recognition)
Advanced	Select the desired advanced options, such as partial batch release, sort options, etc.
Document classes	Right-click the batch class and select “Insert Document Class”

**6 Set up release scripts:** Right-click a document class on the “Batch” tab and select “Release Script.”

Setup Options	Description
Release options	Select a script from the available scripts and click Add. Release options vary from script to script, but typically include image storage location, index field storage, and image type.

**7 Publish the batch class:** Click File | Publish on the menu bar. Select the batch class and click “Publish.”