Working with Capture Jobs in Content Central

Configuring and Testing Capture Jobs in Content Central

With Content Central, you can add documents by dropping them into a monitored folder or by sending them to a monitored e-mail address, but first you must configure a capture job. A *Capture Job* is a collection of settings that tells Content Central how to add documents from a monitored folder or e-mail into Content Central. You can configure Capture Jobs to handle many different types of documents, and to perform some document intake tasks automatically.

You must have access to the **Catalog Manager** application on the Content Central server to create, view, or modify capture jobs. However, after you configure the capture job to monitor a shared folder (or e-mail address), then anyone with access to the shared folder (or anyone who can send e-mail to the monitored e-mail address) can use the capture job to add documents to Content Central.

This How-To article discusses how to configure, test, and troubleshoot a simple capture job for a Monitored Folder. For more information on capture jobs, see the Content Central Admin Guide.

To Create a Capture Job for a Monitored Folder:

1) On the Content Central Server, open **Catalog Manager**.
2) Highlight the Catalog where documents should be added and click **Modify**.
3) In the **Modify Catalog** window, select the **Capture** tab.
4) On the **Capture** tab, click **Add**.
5) On the **General** tab of the **Capture Job Details** window, do the following:
    a. Enter a name and description for this capture job
    b. Select the default document type that Content Central will assign to new documents
    c. Check the checkbox **Capture Job Enabled**

    > **NOTE:** By default, capture jobs for a monitored folder are configured to perform OCR on any image files (i.e JPEG or TIFF format) that are dropped into the monitored folder. If you want to capture image files without performing OCR, then change the **Processing Type** on the **Descriptor** tab to **Electronic.**

6) Click on the **Details** tab and use the browse button to select the folder that that Content Central will monitor.

    > **WARNING:** After Content Central begins processing a document in the monitored folder, it deletes the document so that it will not be added again later. When configuring a capture job for the first time, make sure that you choose a monitored folder that is already empty, otherwise Content Central will add the documents in that folder to a catalog and will delete all files in that folder.

7) Click **OK**.

You have now configured Content Central to monitor the folder.

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To Test a Capture Job for a Monitored Folder:

1) Copy a small test document (fewer than 5 pages) to the folder that you configured as the monitored folder for the capture job.

> **NOTE**: *After Content Central begins processing a document in the monitored folder, it deletes the document so that it will not be added again later.*

2) Log in to Content Central using an account that has been granted permissions to view the Default Document Type that was specified in the Capture Job Details.
3) On the **Content Central Dashboard** (your home screen), click anywhere in the **Coding Queue** area.

In the results grid on the right, the test document will appear as one of the rows in the results grid. If you have a number of documents in the **Coding Queue**, you may have to scroll down or click on the next page of results to see the test document. You can highlight the test document to preview it in the preview pane below.

Getting Documents into the Monitored Folder

You can add documents to a monitored folder using any of the following methods:

- **Configure an Existing Network Printer/Scanner to Scan To the Monitored Folder**
  You or your IT Administrator can configure an existing network printer/scanner to send scans directly to the monitored folder (see your printer/scanner documentation for details).
- **Copy and Paste Using Windows Explorer**
  In Windows Explorer, you can highlight a document or a set of documents and choose **Edit > Copy** (Ctrl + C), and then navigate to the monitored folder and choose **Edit > Paste** (Ctrl + V).
- **Drag and Drop Using Windows Explorer**
  In Windows Explorer, you can highlight a document or set of documents and drag and drop them to the monitored folder.
- **File > Save from any Application**
  From any application, you can save a document directly to the monitored folder.

Troubleshooting Capture Jobs in Content Central

Sometimes you may drop a document into a monitored folder, but cannot find the document in Content Central. When troubleshooting capture jobs, keep the following tips in mind:

Tips for Troubleshooting Capture Jobs

- **Make sure the document disappears from the monitored folder.**
  After Content Central begins processing a document in the monitored folder, it deletes the document so that it will not be added again later. If the document does not disappear from the monitored folder (it usually takes less than a minute), then you will not see it in Content Central. Here are some reasons why a document may not disappear from the monitored folder:

o *None of the capture jobs are configured to monitor the folder that contains the document.*

Make sure that you have dropped the document into the right folder, and that the capture job is monitoring the right location.

o *One or more of the documents in the monitored folder is read-only.*

After Content Central begins processing a document in the monitored folder, it deletes the document so that it will not be added again later. If the document is read-only, then Content Central will not be able to delete the document after it starts processing it, so it does not add the document. Check the file properties for all the documents in the folder to make sure the documents are not read-only.
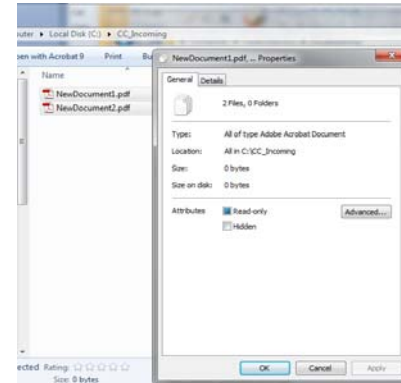
o *The document is in a subfolder of the monitored folder.*

Content Central does not monitor subfolders within a monitored folder, so make sure that the document that you want to add is not in a subfolder.

o *Content Central does not have full control to the monitored folder.*

The Ademero Capture Service is the part of Content Central that monitors folders and e-mail address for new documents. The Capture Service runs on the Content Central server as a service, and it logs on using a Windows account, typically the Network Service account. This account must have full control permissions on all monitored folders. You can see which account the Capture Service uses by opening Windows **Services Manager** and reviewing the **Log on** tab of the properties window.

> **NOTE:** *If the monitored folder is **NOT** located on the Content Central Server, then the Capture Service must be configured to use an account that can access the monitored folder (as well as local resources on the Content Central server). In this scenario, the Capture Service is typically configured to use a domain account that has permissions for both locations.*
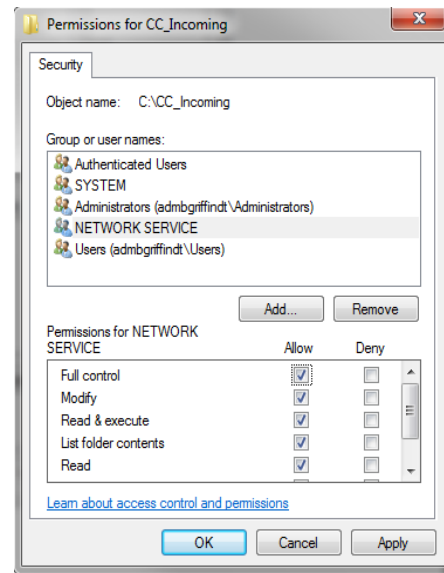
o *Content Central is busy processing an large load of documents.*

When Content Central has more than 25 MB of new documents to add, including all monitored folders and e-mail addresses, then Content Central processes them in batches. This means that Content Central will complete processing of the first 25 MB of documents before it begins

processing the next 25 MB. Within each monitored folder, Content Central works on the oldest documents first.

- ○ *The Capture Service is stopped.*
  The Ademero Capture Service is the part of Content Central that monitors folders and e-mail address for new documents. The Capture Service runs on the Content Central server as a Windows Service, and it must be running for new documents to be added using a capture job.

- **Make sure the Content Central user account has permissions to view the default document type that the capture job creates.**
  When you create a capture job, you must choose the default catalog and the default document type that Content Central will assign to all new documents. If a user does not have permissions to view this default document type, then the user will not see any new documents in Content Central.

  Use the **Catalog Manager** application on the Content Central server to determine which catalog contains the capture job – this is the capture job's *default catalog.* Review the **Document Type** setting on the **General** tab of the **Capture Job Details** to determine the capture job's *default document type.* Then, if you are a Content Central Administrator, you can review the user's permissions by going to **Admin > Users** and clicking on the permissions icon next to the user's account.
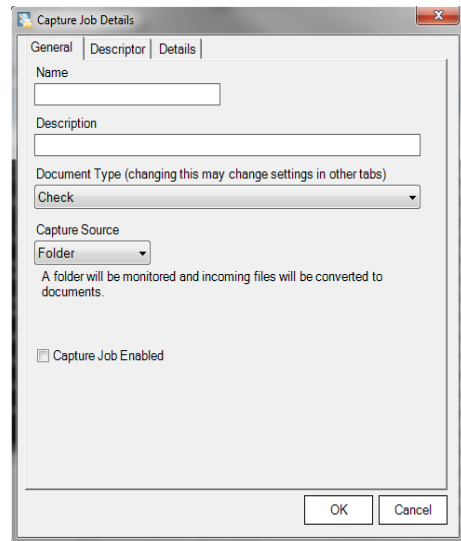
- **Make sure you are looking in the right place in Content Central for the document.**
  By default, a capture job will send a newly added document to the **coding queue**, but you can also configure capture jobs to bypass the **coding queue** and add a new document directly into a catalog using a default document type. When this happens, the new document will not appear in the **coding queue** at all, and instead, it will appear in a subfolder of the Catalog Browser.

  Use the **Catalog Manager** application on the Content Central server to determine if the capture job is configured to bypass the **coding queue**. Review the **Descriptor** tab of the **Capture Job Details** window to see if *Bypass Coding Queue and send documents directly to Catalog* is checked. If it is, then review the
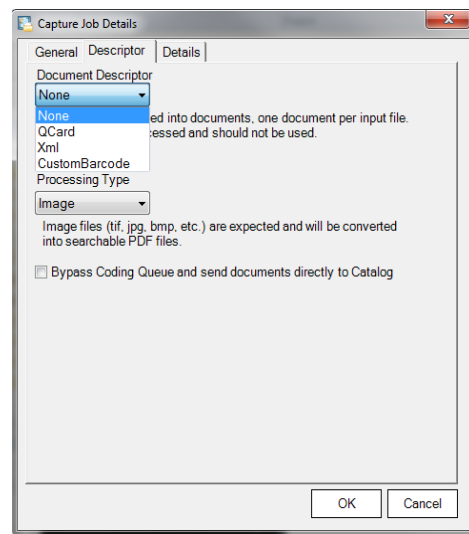
Document Type setting on the **General** tab to determine the capture job's *default document type.* The catalog that contains the capture job is the capture job's *default catalog.*

Then, in Content Central, go to **Folders > Catalog Browser** and navigate to the folder that corresponds to the default catalog and default document type of the capture job.

> **NOTE:** *By default, Content Central creates a folder in Catalog Browser for every* **catalog** *that you create, but it does not create any additional subfolders. With the default configuration, all new documents that are a part of that catalog are filed directly into the catalog's folder (not in any subfolders). However, most of the time, users configure additional Folder Building Rules so that Content Central will store new documents in subfolders of the catalog folder.*
>
> *If you see subfolders under the catalog folder, you will need to review the Folder Building Rules for the capture job's default document type to determine which subfolder contains the document. To review Folder Building Rules in Content Central, go to* **Admin > Catalogs & Document Types***, select the catalog and document type that you want to review, and click* **Folder and File Building***.*

- **Make sure you are dropping in the right kind of documents.**
  Certain types of documents can contain a *document descriptor* in them that provides additional information about the document. An example of a *document descriptor* is a **QCard** or a **Custom Barcode**. If the capture job has been configured to expect a document descriptor, then it will discard any documents that do not have the expected document descriptor. You can review which document descriptor a capture job is expecting by reviewing the **Document Descriptor** setting on Descriptor tab of the **Capture Job Details**. You can also configure Content Central to notify you when a document is discarded. To turn on this notification, go to **Options > Preferences** and check the option *Notify me when a document cannot be processed by the Capture Service.*