



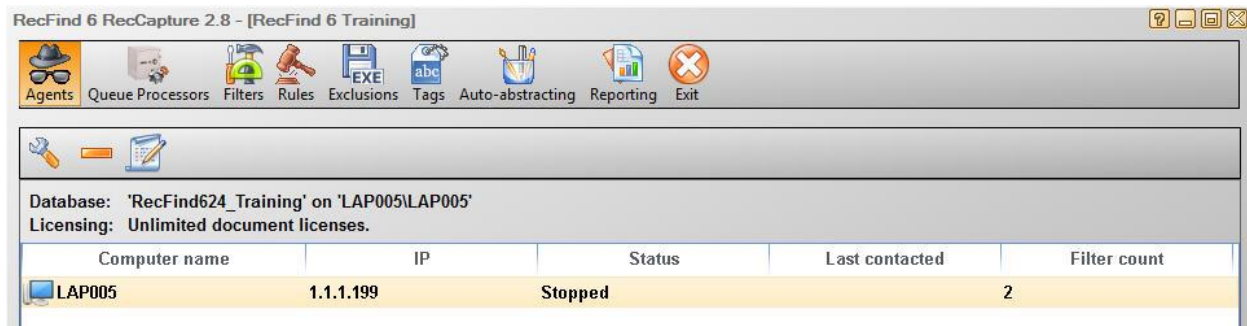
Configuring RecCapture for use with RecFind 6

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Introduction



RecCapture is an add-on product for RecFind 6. Whereas you can easily capture any electronic document manually with the RecFind 6 client, RecCapture significantly enhances the DMS capabilities of RecFind 6 by providing a fully-automatic, rules-driven solution.

RecCapture is a way to implement an organization-wide electronic document management system in a fully automatic way that does not require your end-users to do anything other than search.

It is also the only way to install, configure and roll out an enterprise-wide DMS in a matter of days or weeks, in lieu of months or years (as is the norm).

RecCapture is also a complete solution to the age-old shared-folders/drives problem besetting most organizations. It is also a complete solution for any compliance issue enabling you to meet the compliance requirements of any legislation.

There are three (3) major components in RecCapture for you to configure; these are:

1. Agents;
2. Rules; and
3. Filters.

Agents should be thought of as small very fast programs that you deploy across your network drives to instantly capture any new or modified electronic documents. You can deploy a single agent or as many agents as you require to ensure optimum performance because the agents operate asynchronously.

Filters tell the Agents what to capture.

Rules are used by RecCapture (the Queue Processor component) to analyze all captured electronic documents and determine which ones to ignore, which ones to capture and, most importantly, how to store and classify captured electronic documents in RecFind 6.

What do you need to do before you configure RecCapture?

Think about what you want to capture

RecCapture can capture any type of electronic document from any network location; there are no limitations. However, unless you want to capture absolutely everything (remember the oldest acronym in the IT business, GIGO or Garbage In equals Garbage Out) and fill up your corporate store with Gigabytes of electronic junk you need to do some kind of preliminary analysis.

Shared drives, by their very nature, are full of duplications and junk and old, irrelevant and redundant material.

RecCapture includes an initial sweep function (to get everything in the nominated shared drives) and a 'capture all' selection but you would have to be a very special case to use this functionality.

We recommend that you and your key staff discuss and agree:

- What is relevant to the current business operation?
- Which documents are vital records? See following paper:

<http://www.knowledgeonecorp.com/news/pdfs/Capturing%20Vital%20Paper%20Based%20Records.pdf>

- How far back do you need to go? Seven years for example, is the usual maximum period for most compliance legislation.

Think about security

When you store captured documents in RecFind 6 you assign security. Security determines who can search for and view any document (using the sophisticated search features of RecFind 6). There is always a 'need to know' in any organization just as there is always a need for document security.

I would always start by looking at the security system you have implemented in RecFind 6 (and hopefully, it is not overly complex because it never should be). If for example, you have decided on a security hierarchy of Board Members, Directors, Level 1 Managers, Level 2 Managers, Staff, Contractors, partners, Customers in RecFind 6 then this is the security you should apply to captured documents.

As always, the most appropriate acronym in this case is KISS – Keep It Simple Stupid!

For whatever reason, there is always the temptation to overcomplicate the security system, especially at the beginning. RecFind 6 will allow you to configure the most complex security system imaginable but we certainly do not recommend you do this. An overly complex security system will just infuriate your staff and cause them to become negative about the system. My advice is to start with something that is both adequate and basic and then tweak it later.

Think about cleaning up and reorganizing your network drives before starting RecCapture

Network shared drives usually start out well organized and then quickly degenerate into chaos as every Tom, Dick and Harriett make 'improvements'. I wouldn't attempt to completely reorganize the network drives but I would recommend tidying them up by making sure there is some logic to the way folders and sub folders are organized. The better the job you do here the easier it is to configure rules in RecCapture, or more specifically, the fewer rules you will need in RecCapture. However, be careful that any reorganization doesn't confuse and disadvantage your end-users.

Network drives also usually contain a lot of superfluous material like copies and backups and 'personal' information. Try to identify and delete all the superfluous material before turning on RecCapture. This will give the initial sweep phase of RecCapture far less work to do.

Lastly, bite the bullet and delete old documents so the initial sweep phase of RecCapture is as fast as possible. Old is obviously a qualitative not quantitative word so first agree on a definition of what old means to your organization. As far as compliance goes, different types or classes of documents will have

different retention periods mandated. My recommendation is to initially agree on the longest retention period (say seven years) and then apply that to all documents.

Think about what you want to do with the electronic documents after you capture them

RecCapture includes the functionality required to both classify captured documents and to initiate workflow if required.

Again, my advice for new customers is KISS, at least at the beginning.

Note that there is absolutely no need to replicate the hierarchical filing systems used for paper documents (but you can if you must). These classification systems are historically there just to make it easier to find 'physical' stuff. RecFind 6 doesn't need such complex hierarchical structures to find stuff; it has a very sophisticated and very clever and easy to use search function that mean you can literally find anything in seconds no matter how it has been organized or classified.

You can pre-create a folder structure in RecFind 6 that 'makes sense' to your users (especially for browsing purposes) but it isn't necessary. You can simply save all electronic documents as what we call EDOCs, that is, the electronic document together with its associated Metadata. As long as the EDOC is correctly classified and has the correct security code then you will meet most objectives (including compliance requirements) and you will be able to find it easily and instantly.

Some of you with classical records management training (e.g., ARMA) may find this approach hard to accept but trust me; it will make the system far less cumbersome and infinitely easier for end-users to access.

If you intend to automatically allocate workflow to selected captured documents then the best way is to create folder templates (we call them Metadata Profiles) that you can clone when capturing an electronic document.

Think about using authoring templates and embedded tags to add structure to unstructured documents

Unlike emails (which have sender, recipient, CC, subject, etc.) most electronic documents have no 'standard' structure. This makes them harder to parse and classify.

RecCapture has a feature which allows you to add XML tags to electronic documents as you create them. The RecCapture rules processor will then process these tags and store and classify the electronic document according to the information in the tags. The simplest example is a file number or case number. If you embed the file number or case number in a Word or Excel document then RecCapture doesn't have to try and figure it out by analyzing the text of the document; there is no possibility of error.

You can add XML tags manually but the easiest and most foolproof (and consistent) way of doing this is to add the tags to Word and Excel templates (where they can also be made invisible).

Adding structure to unstructured documents (e.g., Word, Excel, and PowerPoint) allows you to handle them in a precise and consistent way.

Think about ‘grouping’ folders and sub-folders

RecCapture includes the functionality to define a group of folders and then apply a single rule to that group.

Let’s say you have a support department and the support staff store all their documents in sub folders in two or more folders in your shared drives. In RecCapture you can assign a group name to all of these folders and sub folders and then assign a rule to the group name. This makes it infinitely easier to configure and maintain rules.

So if you have say six levels in your organization (hopefully analogous to your security system) you should find out all the folders and sub folders used by each level in your shared drives and then group them in RecCapture. You can then use a single rule to capture all documents instead of having to use multiple rules.

Note that this is a logical grouping only within RecCapture; you don’t have to do anything with your shared drives.

Think about the types of electronic document you need to capture as well as the types you do not need to capture

RecCapture allows you to specify the document types you want to capture (e.g., .DOC, .PDF, .XLS, etc.) as well as the document types you wish to ignore (e.g., .BAK).

It comes with default lists which you should review and which you will probably want to modify to suit your specific needs.

Think about noise words (sometimes called stop words) and keywords (we call them seed words)

RecCapture includes the functionality to automatically build abstracts for all captured electronic documents. These abstracts become a searchable part of the EDOC.

One of the ways to create abstracts is to do it automatically using an algorithm built into RecCapture. However, this algorithm works on a list of words called ‘seed words’. RecCapture doesn’t come with a default list of seed words so you will need to add yours to the list.

When building abstracts for different classes of document you can select seed words from the master list that you want RecCapture to look for. These seed words help RecCapture decide on the sentences to use when building the automatic abstract.

You can also tell RecCapture to either include or exclude noise words (e.g., on, over, under, about, above, across, etc.) in the abstract. RecCapture does come with a default set of noise words. However, you will probably want to modify this list to suit your specific needs.

Configuring RecCapture – step by step

This is the order I suggest you follow:

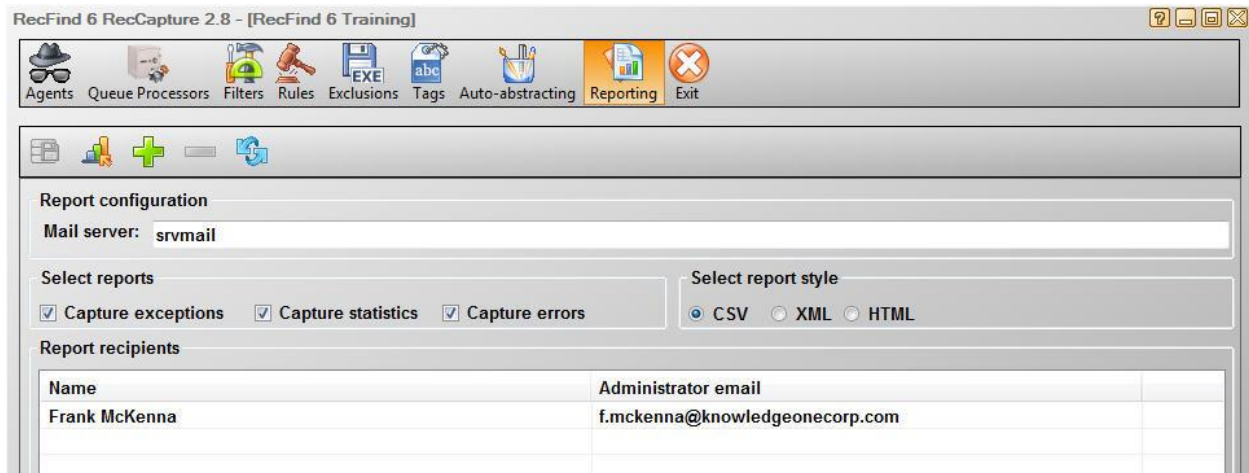
Reporting options

RecCapture will automatically email a report to the person(s) you designate each evening at midnight. You need to select the statistics you want as well as the people you want them emailed to.



Select the reporting button **Reporting** from the main toolbar.

You will see the following screen:



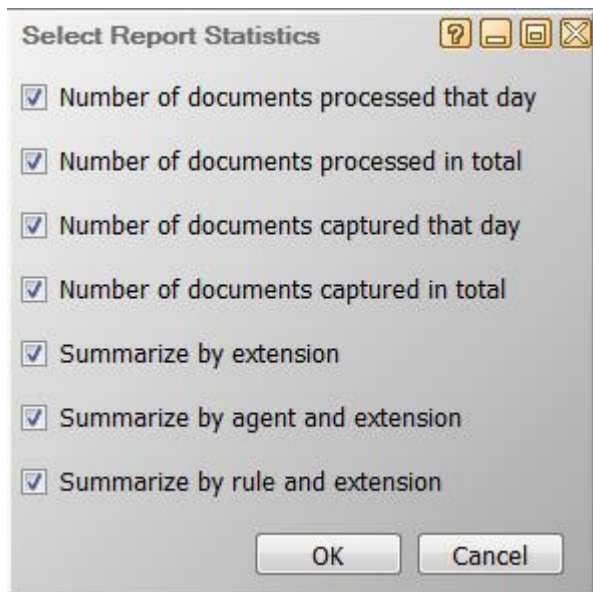
In the above example I have ticked capture exemptions (those documents that didn't match any of your rules), capture statistics and capture errors. I recommend that you do the same to begin.

I have also selected CSV format (so I can view and massage the reports in Excel). You should choose the format you prefer.

I have selected me to email the reports to and I have selected our Exchange email server.



To select report statistics select the report statistics button **Reporting** and you will see the following screen:

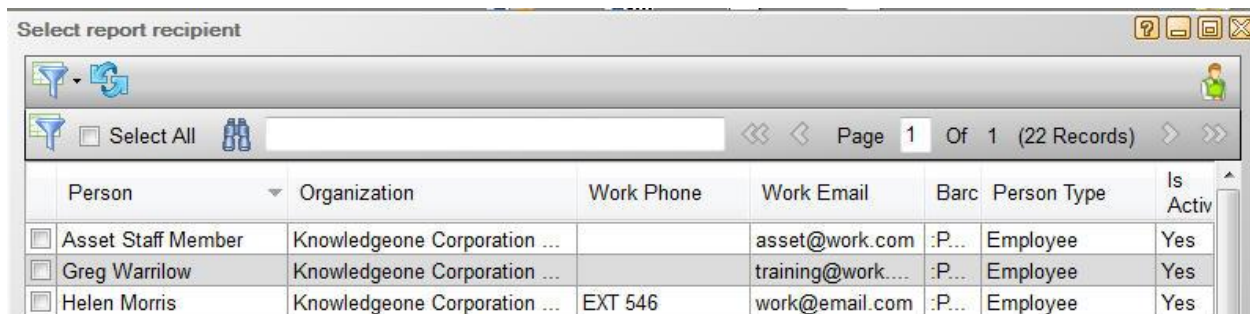


Select the statistics you want (I suggest you tick all to begin) and then click OK.

To add a new recipient for reports click on the add report recipient button.



You will see the following screen:



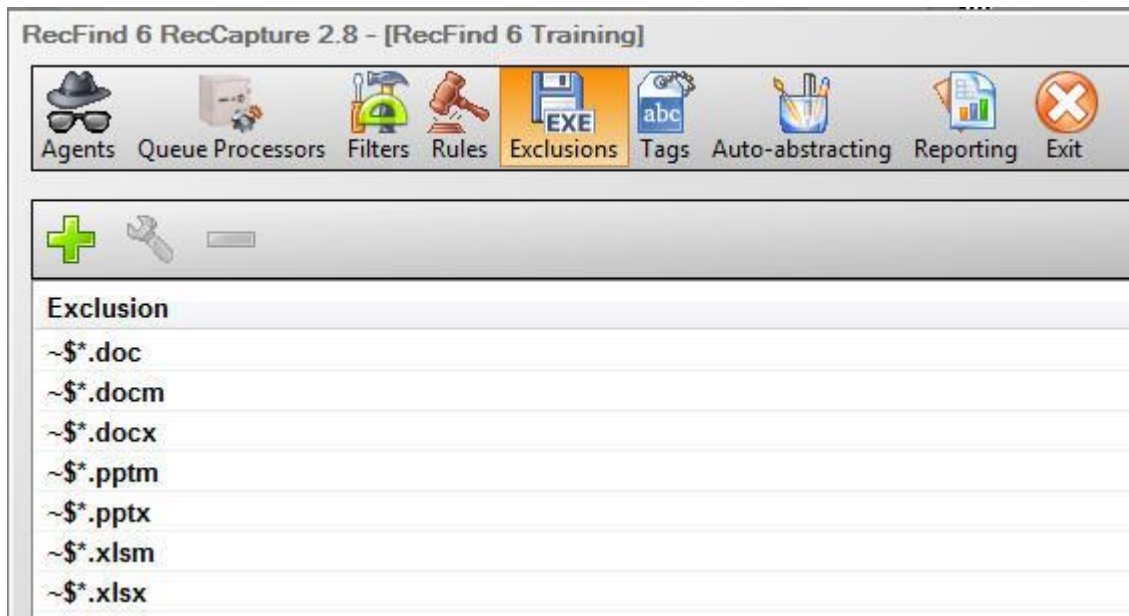
This lists your employees (from the RecFind 6 database) and allows you to select additional recipients.

Exclusions

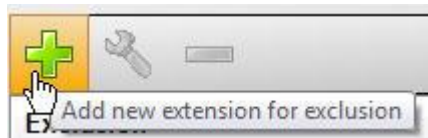
Select the exclusions button from the main toolbar.



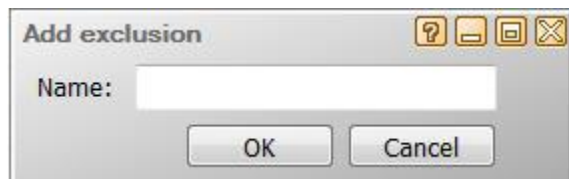
You will see the following screen:



Click the 'add new extension' button to add a new extension.



You will see the following screen:



Add your new extension (and exclusion string if required) and click OK.

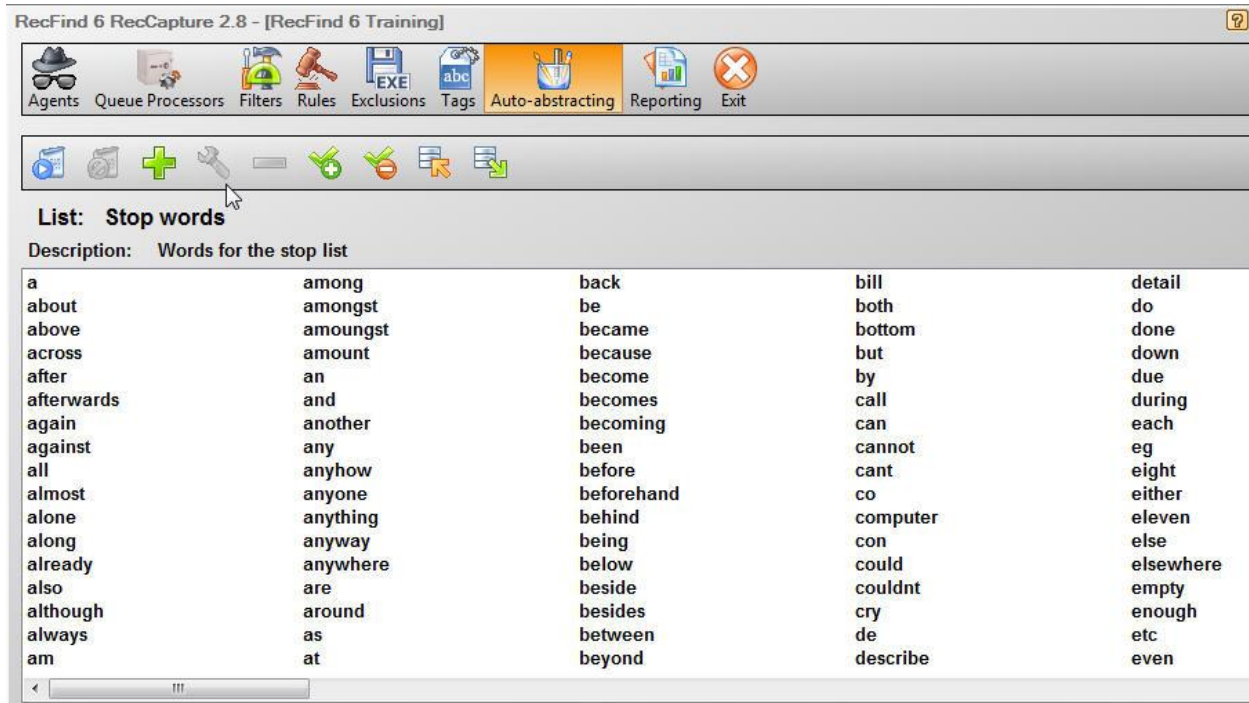
Seed list and stop words

The nice thing about these lists is that they be imported (and exported) and well as entered from the keyboard.

Select the Auto-abstracting button from the main toolbar.



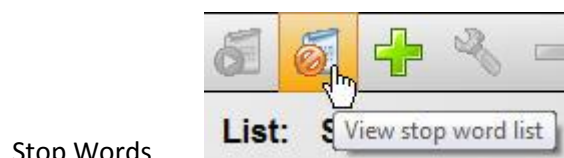
You will see the following screen:




You can flip-flop between the Stop Word list and the Seed List by clicking on either button.



Seed List

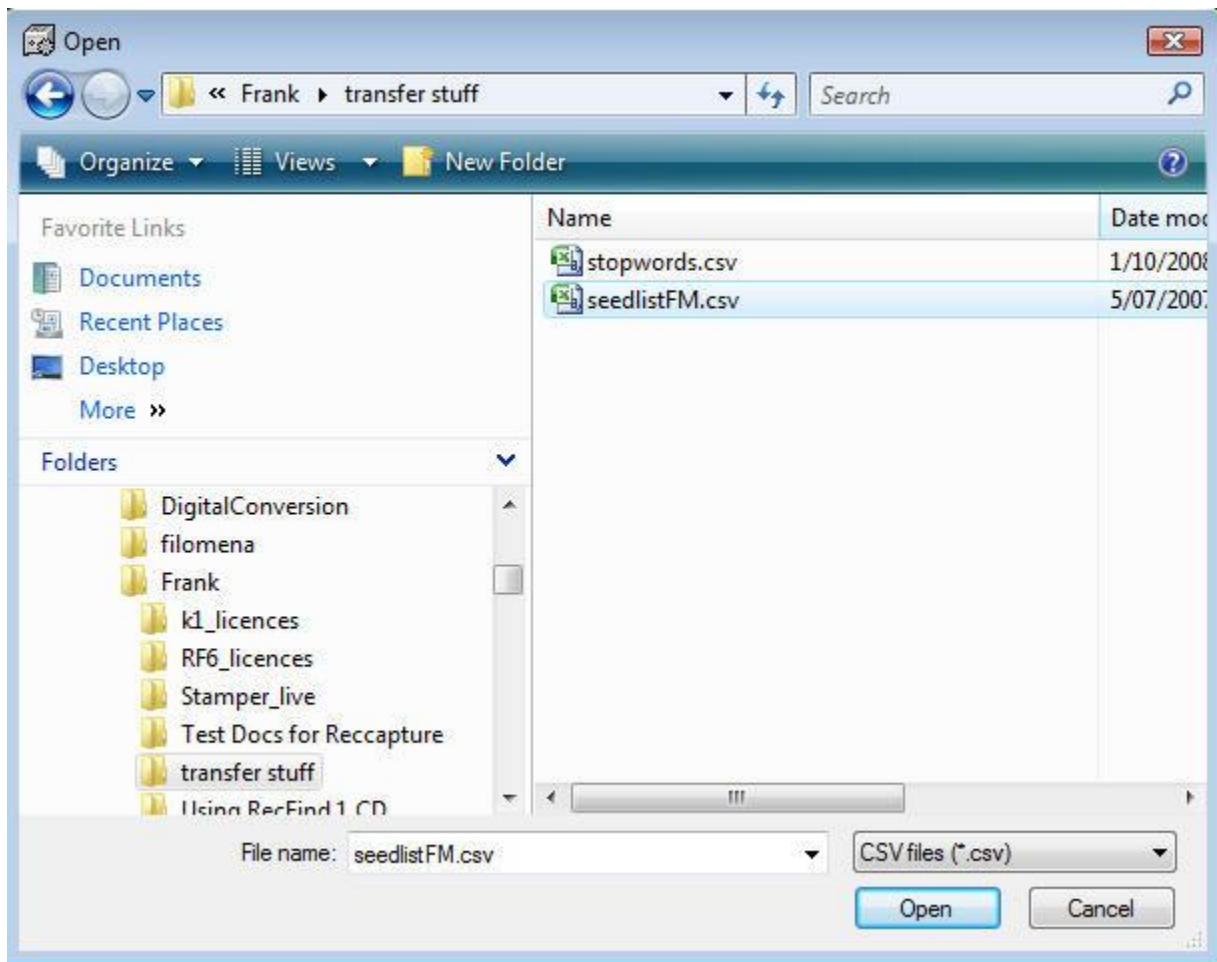


Stop Words

To add a new word (e.g., to the Seed List) either click the add button  or import a seed list from a txt or csv file (plain text) as follows:

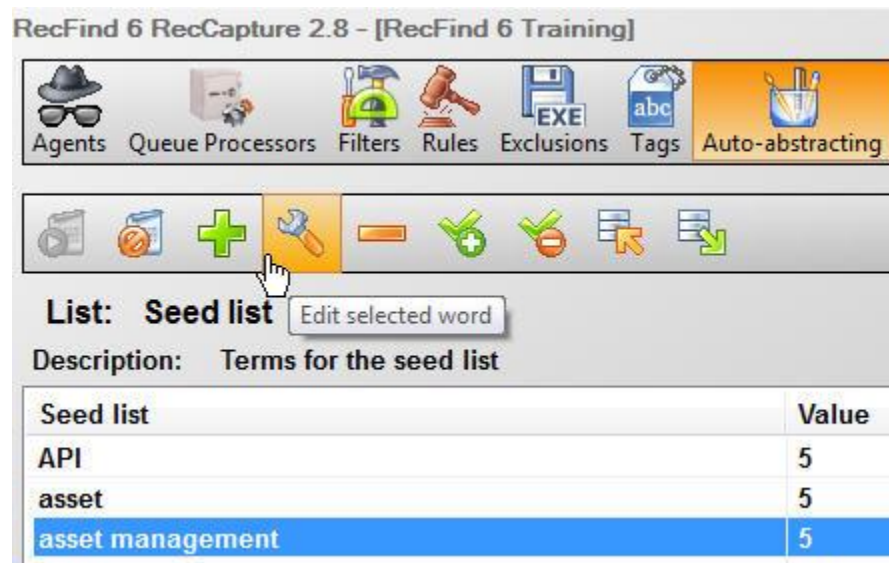


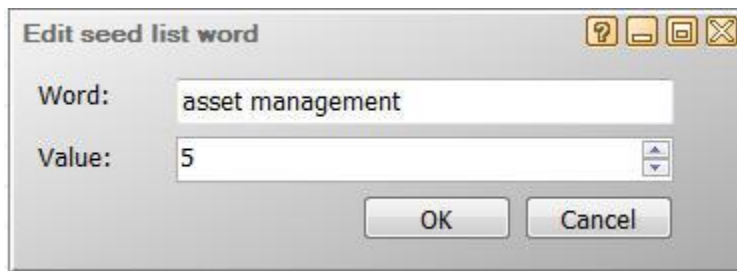
Click the Import button you will see a screen similar to the following:



Select your list to import and click Open.

Now you have your list and you can edit it within RecCapture.





The value determines the weighting this word has when the RecCapture algorithm tries to determine the most appropriate sentences for the abstract. The higher the value, the greater the weighting.

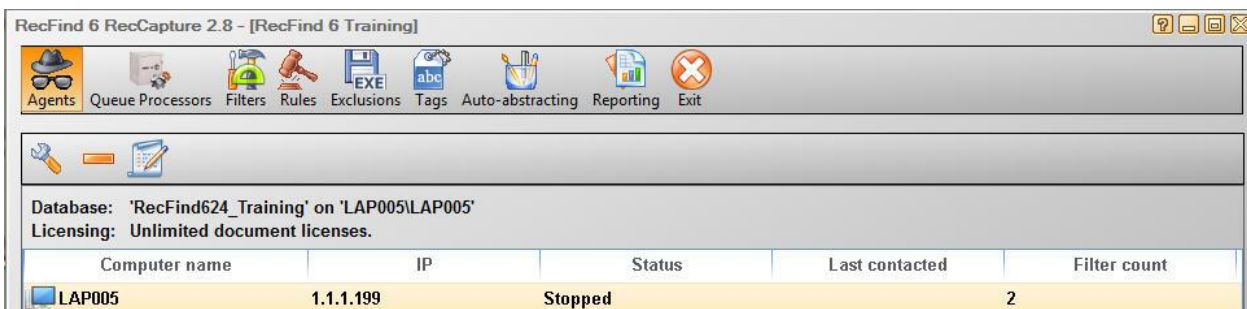
The Agent

You can install as many agents as you require. In the following example we have a single agent installed to monitor all of our shared folders. You install additional agents if required to improve performance because they operate asynchronously (i.e., similar to multi-threading). I recommend that you begin with a single agent and monitor performance.

To begin configuring agents click on the configure agents button on the main toolbar.

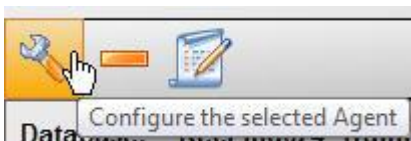


You will see the following screen:

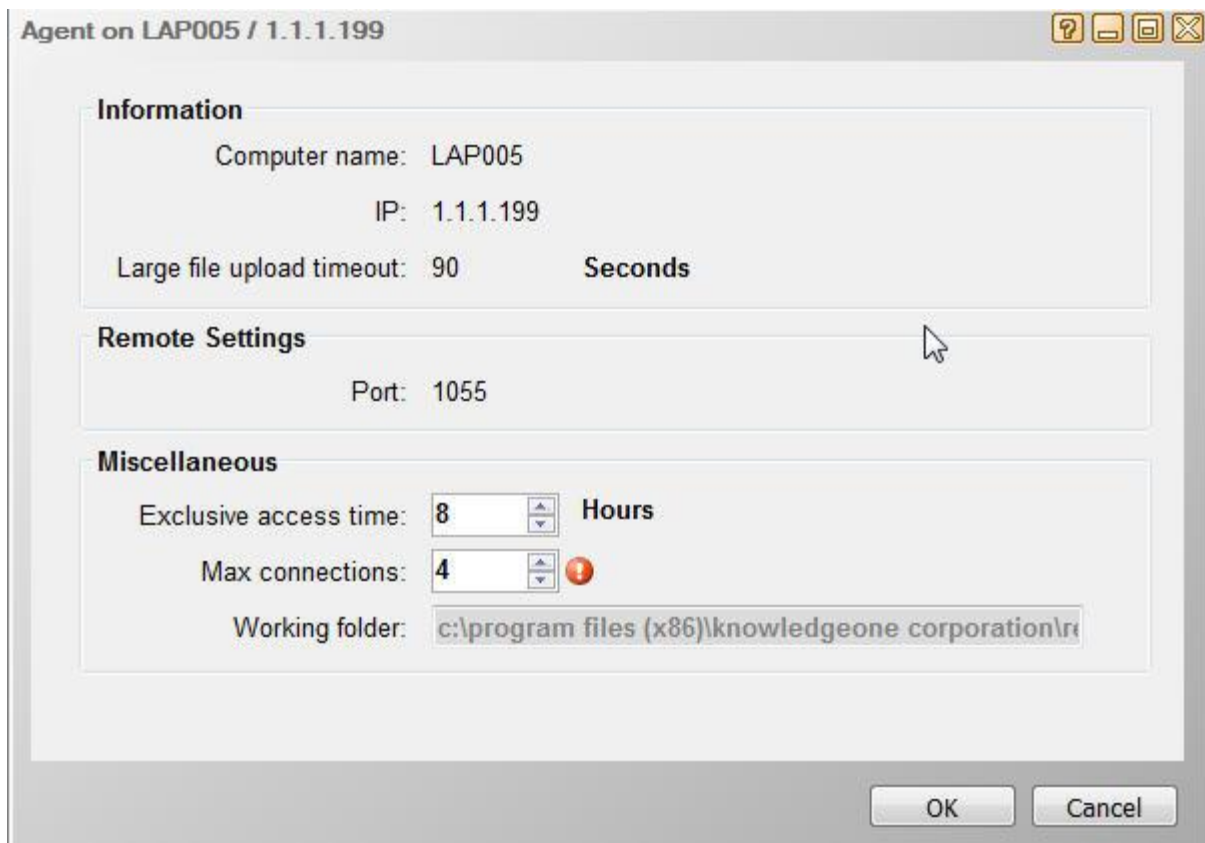


In this screen you can configure an agent and all its associated filters. You can also disconnect a stopped agent (if no longer required).

To configure the agent click on the configure agent button.



You will see the following screen:



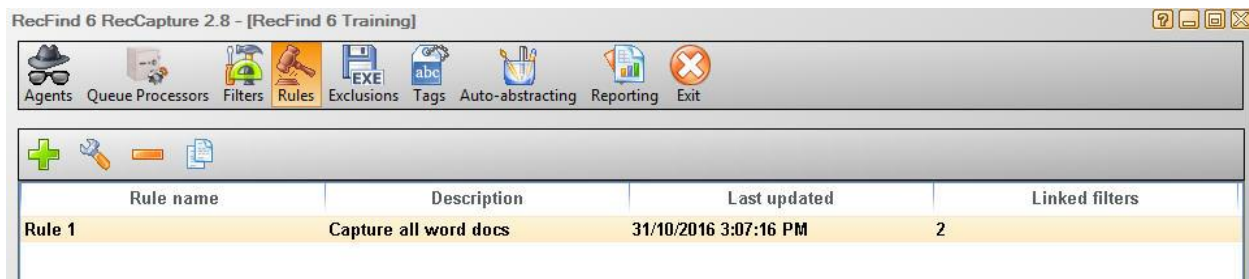
Most of the settings in the above screen are 'technical' and are best left to the IT people. All are explained in the RecCapture help screens (click on the ? button in the top right of the screen) so I will not go into detail here. Suffice to say I would leave these settings as is unless you are advised to modify them by one of your IT experts.

Rules

Select the Rules button from the main toolbar.



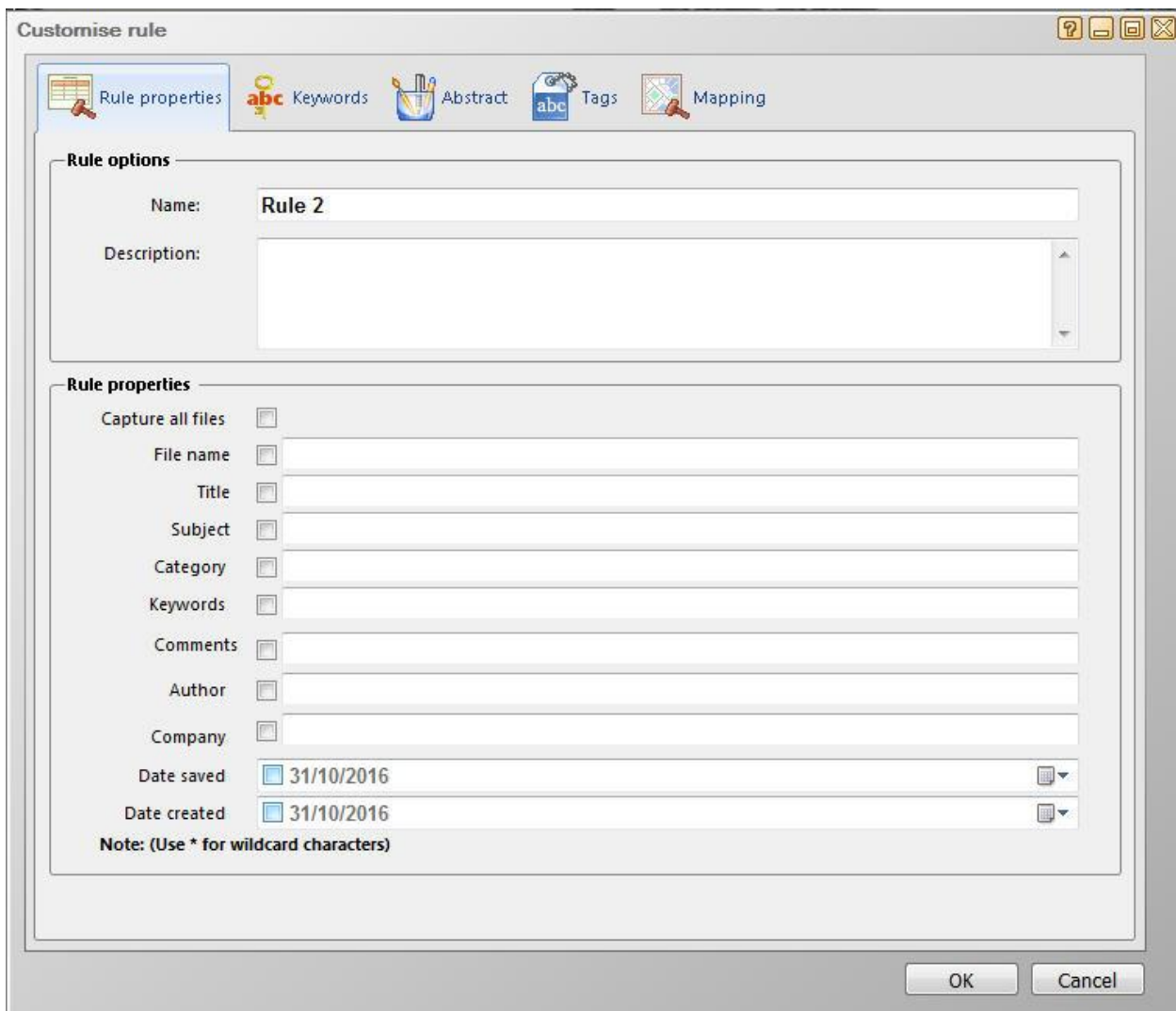
You will see the following screen:



To add a rule click on the add rule button as follows:



You will see the following screen with 5 tabs:



The rules processor (above) has five (5) components. They are:



Rule configuration

This is where you name the rule and describe what it does.

This is also where you select the 'natural' attributes or 'properties' that electronic documents must have to be captured by this rule.



Keywords

This is where you nominate the keywords that the electronic document must have to be captured by this rule.



Abstract

This is where you specify your abstracting requirements.



Tags

This is where you specify which 'tags' (embedded XML data within the electronic document) RecCapture is to look for within the document.



Mappings

This is where you specify how any electronic documents captured under this rule are to be stored and classified within RecFind 6 or K1. It is also where you specify any workflow (by cloning a Metadata Profile template) that should be initiated once this document is stored.

Important

A rule must be linked to a filter before it can do any work. The filter specifies which folders or grouped folders the agent is to monitor and the type of electronic document (e.g., .DOC) it is to capture. The rule is then used by the RecCapture Queue Processor to examine all electronic documents captured by the agent. This is an important concept within RecCapture – rules and filters are interdependent, they work together to capture and analyze the electronic documents you specify.

The filter tells the agent which folders to monitor and what type of electronic documents to capture.

The agent writes all captured electronic documents to a holding queue (a SQL table).

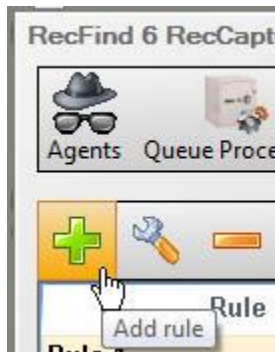
The RecCapture process called the 'Queue Processor' continually processes the queue and analyzes all captured electronic documents using the rules you have specified. If a captured electronic document meets any rule it is written to the RecFind 6 database using the rule Mappings you have specified within the rule. If an electronic document does not meet any rule it is ignored. The queue processor also continually clears the queue of any electronic documents it has ignored and any it has already written to the RecFind 6 database.

The capturing of any new or modified electronic document from your shared drives is handled by the agent and is 'instant' as it needs to be; there are no delays. The agent is instantly alerted any time a new or modified document is saved, the agent does not need to 'read through' the shared drives.

The processing of the queue takes some time (seconds or fractions of a second only) but this is not a time critical process as the document has already been captured.

Configuring a Rule

Let's start by clicking on the add rule button.



You will see the following screen:

Customise rule

Rule properties **Keywords** Abstract Tags Mapping

Rule options

Name:

Description:

Rule properties

Capture all files ☐

File name ☒ *.msg

Title ☐

Subject ☐

Category ☐

Keywords ☐

Comments ☐

Author ☐

Company ☐

Date saved

Date created

Note: (Use * for wildcard characters)

OK Cancel

Enter your rule name and description (so someone else will know what you were trying to achieve) then add your rule properties.

Make your entries and then click the next tab (Keywords).



You will see the following screen:

Rule properties
 Keywords
 Abstract
 Tags
 Mapping

Search for the following words or phrases in the document

Portion to search

First string:

Operator ☒ AND ☐ OR

Second string:

Operator ☒ AND ☐ OR

Third string:

Operator ☒ AND ☐ OR

Fourth string:

Operator ☒ AND ☐ OR

Fifth string:

Operator ☒ AND ☐ OR

0% to 100%

0% to 100%

0% to 100%

0% to 100%

0% to 100%

Note: (Use * for wildcard characters)

Enter the strings of information you are looking (see following example) for and then click the next Tab (Abstract).

Rule properties
 Keywords
 Abstract
 Tags
 Mapping

Search for the following words or phrases in the document

Portion to search

First string:

Operator ☒ AND ☐ OR

Second string:

Operator ☒ AND ☐ OR

Third string:

Operator ☒ AND ☐ OR

Fourth string:

Operator ☒ AND ☐ OR

Fifth string:

Operator ☒ AND ☐ OR

0% to 100%

0% to 100%

0% to 100%

0% to 100%

0% to 100%

Note: (Use * for wildcard characters)

Abstract

You will see the following screen:

Rule properties Keywords Abstract Tags Mapping

☐ Use the first 1 characters of the electronic document

☐ Use the last 1 characters of the electronic document

☐ Line 1 of Paragraph 1 ☐ Plus

Line 1 of Paragraph 2 ☐ Plus

Line 1 of Paragraph 3 ☐ Plus

Line 1 of Paragraph 4 ☐ Plus

Line 1 of Paragraph 5

☐ Use the following text for the abstract:

☐ Automatic abstracting

Configure seed list ☐ Remove stop words from abstract

☒ Do not build abstract

The above screen gives you five different ways to build an abstract or you can say do not build an abstract (the default).

You also have the option of removing stop words (noise words) from the abstract for a more concise (but not grammatical) abstract.

Make your selection (see following example).

Rule properties
 Keywords
 Abstract
 Tags
 Mapping

☐ Use the first characters of the electronic document

☐ Use the last characters of the electronic document

☐ Line of Paragraph ☐ Plus
 Line of Paragraph ☐ Plus
 Line of Paragraph ☐ Plus
 Line of Paragraph ☐ Plus
 Line of Paragraph ☐ Plus

☐ Use the following text for the abstract:

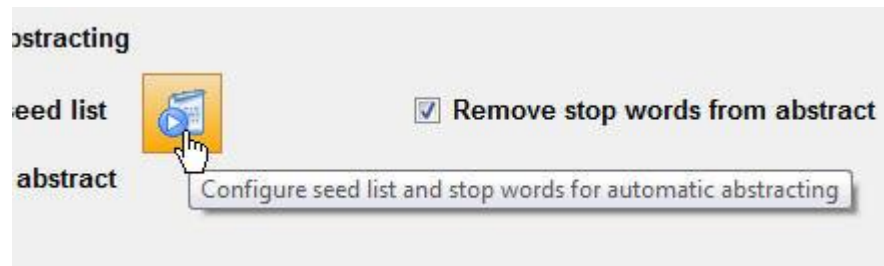
☒ Automatic abstracting

Configure seed list
☒ Remove stop words from abstract

☐ Do not build abstract

In the above example I have used automatic abstracting because I know we have imported a seed list for this purpose. My next task is to select the words from the seed list to use for this example.

Click on the seed list button as follows:



You will see the following screen:

Edit Rule's seed list

Available seed words

Name	Value
CRM	5
consulting	5
consult	5
complaint	5
client	5
Button	10
bug	5
bid	5
Automatic Software Up...	10
ASU	10
asset management	5
asset	5
API	5

Selected seed words

Name	Value
------	-------

OK Cancel

Make your selections and edit the value of any selected seed word if required for this rule then click OK.

Edit Rule's seed list

Available seed words

Name	Value
workflow	5
training	5
train	5
tacit	10
suspect	5
supporting	5
scanning	5
scanner	5
sale	5
ROI	10
RMS	5
RFP	5
RFI	5

Selected seed words

Name	Value
complaint	5
Customer Relationship	5
Automatic Software Upgr...	10
DMS	5
bug	5
support	5
CRM	5

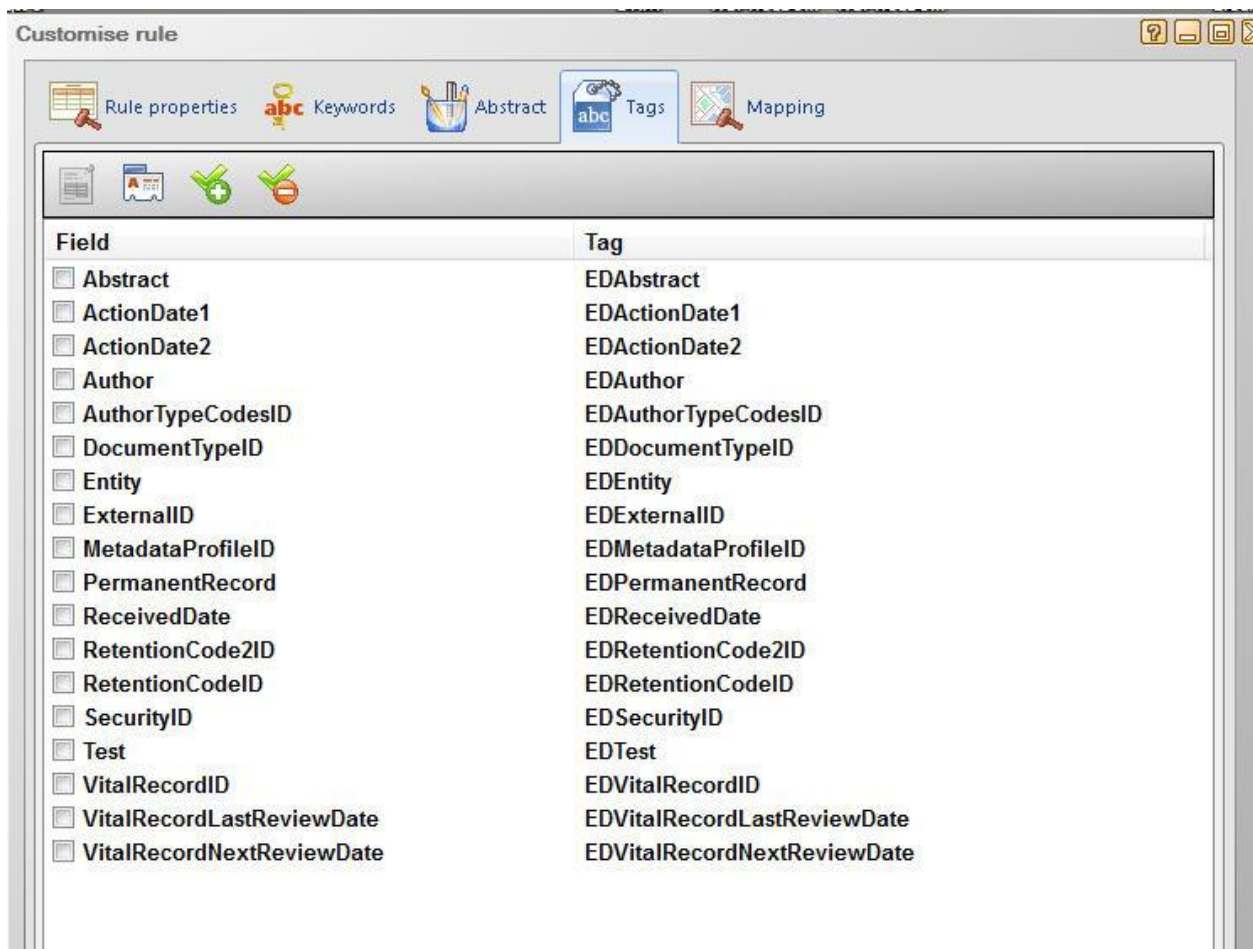
OK Cancel

Click OK to save your selection.

Now select the next tab (Tags).



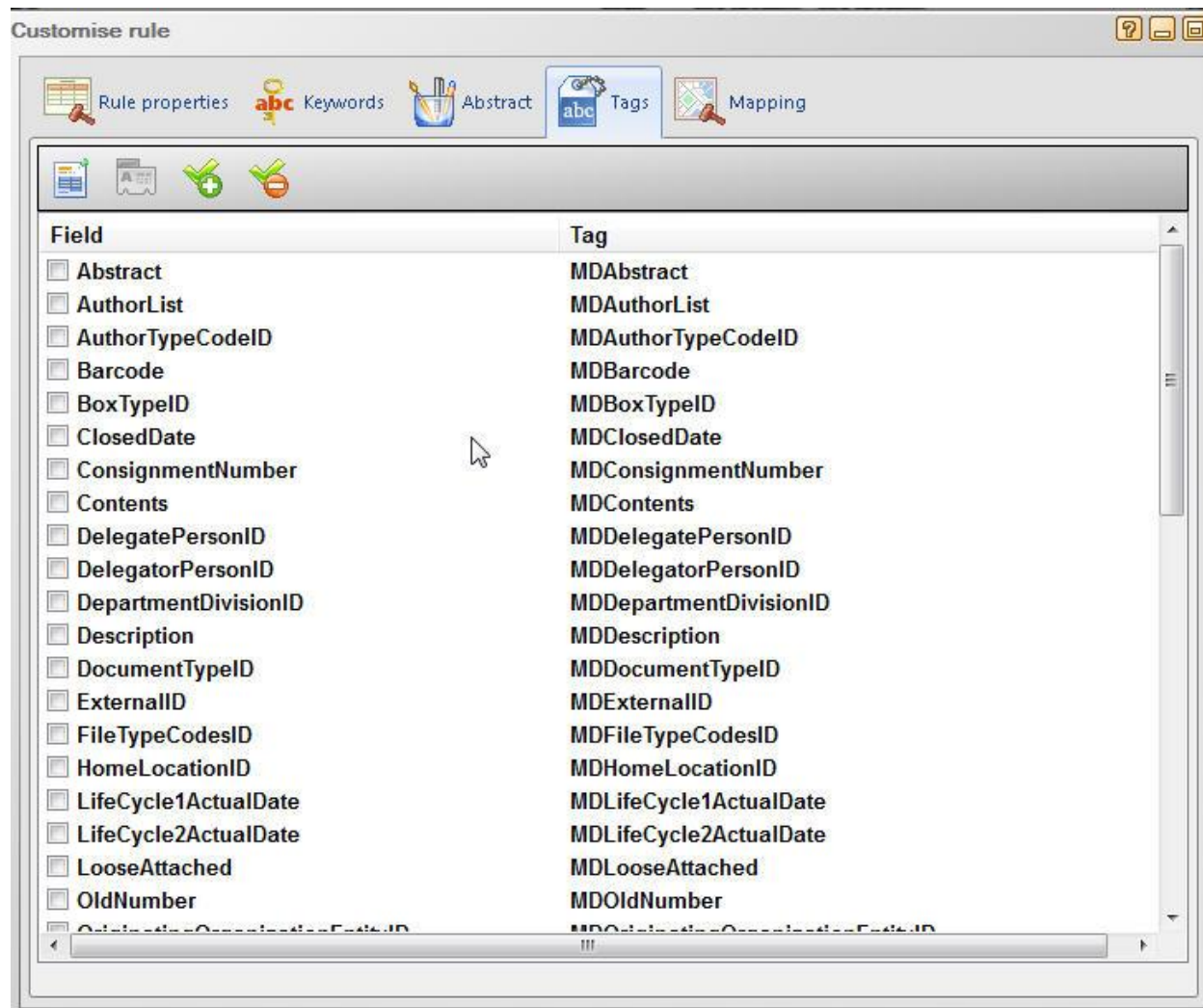
You will see the following screen:



This screen lists the existing Tags (you can modify the Tags using the DRM for RecFind 6) for the EDOC table. You can flip flop between this and the Tags for the Metadata Profile table by selecting the other 'active' button.



Then you will see this screen (the Metadata Profile Tags):



How to store an electronic document in RecFind 6?

RecCapture gives you several options for linking to Metadata Profile records, for example:

1. You can capture an electronic document and store just the EDOC (the electronic document plus its natural Metadata);
2. You can link the EDOC to an existing Metadata Profile record;
3. You can clone an existing Metadata Profile record and link it to the EDOC; or
4. You can create a new Metadata Profile record from the data in the tags and link it to the EDOC.

I will explain these options further when we get to the Mapping screen.

What you need to do in either of these Tag screens, is tick (select) the Tags you want RecCapture to search for. That is, the Tags (in XML format) you expect to find in documents that will be captured by this particular rule.

RecCapture will only search the full text of the document for the Tags you select in this screen.

For example, if the following XML data is included in a Word document —

```
<Author>Knowledgeone Corporation</Author>
```

The text "Knowledgeone Corporation" will be saved in the "Author" field of the EDOC record (provided, of course, that the "Author" field is selected on the EDOC Tags screen above). In order to minimize the obtrusiveness of any tags inserted into a document, it is possible to hide the text, either through coloring or changing its "visible" property.

Important

The values in Tags will override the values in the EDOC or Metadata Profile records.

In this example I am not using Tags because I am searching for emails in .MSG format so I will not select any.

Click the next button (Mappings).



You will see the following screen:

A screenshot of the "Customise rule" dialog box. The dialog has a title bar with standard window controls. Below the title bar is a tabbed interface with five tabs: "Rule properties", "Keywords", "Abstract", "Tags", and "Mapping". The "Mapping" tab is currently selected. Inside the "Mapping" tab, there are two sub-tabs: "EDOC settings" and "MetadataProfile settings". The "EDOC settings" sub-tab is active. It contains the following fields: "Document type:" with a dropdown menu, "EDOC type:" with a dropdown menu, "ExternalID:" with three radio button options: "File name" (selected), "Rule's name", and "Custom Text" (with an adjacent text input field). Below these is a section titled "If duplicate filename found:" with four radio button options: "Add as new EDOC" (selected), "Add as new version (latest)", "Add as new version (all)", and "Ignore it".

This is where you tell RecCapture what to do with any electronic documents that meet the criteria of this rule. Keep in mind that RecCapture is linked to RecFind 6 and that some of the drop down values (e.g., Document Type) in the above screen come from the RecFind 6 database.

Before we examine all the options let's digress a little.

Linking to a Metadata Profile (MDP) record

Firstly, this is optional. Think of a MDP as a parent folder with additional Metadata. The electronic document is always stored as an EDOC record and the EDOC contains both the actual electronic record (stored as a BLOB – Binary Large Object in RecFind 6) and the document's 'natural' Metadata like author, original filename, size, date created, etc.

We can link to an existing MDP, we can create a new MDP from Tag information or we can clone an existing MDP.

Searching for an EDOC

The cardinal rule we should apply when deciding how to store an EDOC is that it should facilitate the search process. That is, we should store and index it in a way that makes it as easy as possible to find via the search function in RecFind 6.

Keep it in mind that we automatically index the full text of any text-based electronic document and we also automatically index any Metadata. This means we know we can always find the EDOC by either a full text search (on the contents of the electronic document) or a Metadata (or BOOLEAN) search based on the contents of any of the fields of the EDOC such as External ID, Original Filename, Author, date Created, etc.

In fact in both the Metadata and BOOLEAN searches of RecFind 6 we can combine the full text and Metadata searches. For example, "Find any EDOC with the word "Jaguar" in the External ID, "proposal" in the original file name and the words "finance proposal" OR "Trivett Group" in the full text of the electronic document".

The advanced indexing and search capabilities mean we do not have to attach an EDOC to a MDP. However, we may choose to do so for logical reasons (e.g., to group all of the electronic documents pertaining to a particular contract 'under' a MDP representing the contract). Grouping EDOCS under an MDP makes it easy for staff to 'browse' for information as well as search.

The following is my selection for our example rule.

EDOC settings MetadataProfile settings

Captured file settings

Document type: Telephone Enquiry - 2 Days

EDOC type: Email

ExternalID:

☒ File name

☐ Rule's name

☐ Custom Text

If duplicate filename found:

☒ Add as new EDOC

☐ Add as new version (latest)

☐ Add as new version (all)

☐ Ignore it

EDOC settings MetadataProfile settings

Match to MetadataProfile by

Field: Do Not Match

using tag:

Attach with security: Basic

☐ Inherit security from MetadataProfile

If more than one match then:

☐ Attach to latest

☒ Ignore it

If no match

☐ Attach to MetadataProfile

☐ Create MetadataProfile from tags

☒ Create EDOC only

☐ Ignore it

Security code: Administrator

- I selected 'telephone Inquiry – 2 days' as the document type.
- I selected the filename as the External ID of the EDOC.

- Because we are dealing with emails, I selected 'add as a new EDOC' if a duplicate filename is found.
- I chose not to attach/link the EDOC to a MDP.
- I chose the Basic security code because I do not want to restrict access to this information.

The RecCapture online help screens included information on all of the options in the Mappings screen. For example:

Captured file settings:

EDOC type: This field determines the value inserted into the "Type" field of the created EDOC record. These are the values included in the RecFind 6 database. If you wish to expand this list, please use RecFind 6.

Document type: This field determines the value inserted into the "Document Type" field of the created EDOC record. These are the values included in the RecFind 6 database. If you wish to expand this list, please use RecFind 6.

ExternalID: This field determines the value inserted into the "ExternalID" field of the created EDOC record. It is possible to select either the name of the captured document, the name of the rule used to capture the document, or an arbitrary text string that is specified in the field below. Note: If the ExternalID tag has been selected and included in the document, it will override this setting.

Match to MetadataProfile by:

Field: It is possible to link the captured document to a MetadataProfile record. This field determines the criterion that will be used to enforce the join.

Attach with security: This field determines the security level of the attachment. An increased security setting may prevent users from viewing, modifying or deleting this record in RecFind 6.

Inherit security from MetadataProfile: Select this option if you wish to inherit the security level of the parent MetadataProfile record.

If more than one match, then: This setting determines what will happen if there is more than one match for the selected field. It is possible to ignore the link, or create the link only to the newest record.

If duplicate file name found:

It is possible that the captured file will already exist in the RecFind 6 database. If this is the case, it is possible to:

Add as new EDOC: This will create a new EDOC record.

Add as new version (all): This will add the document to all existing matching EDOC records.

Add as new version (latest): This will add the document to the newest existing EDOC record.

Ignore it: This will not add the document if a match exists.

If no match:

If there is no match in the RecFind 6 database, it is possible to:

Attach to MetadataProfile: This will attach the document to the MetadataProfile you select. Click the folder icon to browse for the desired record. (The document itself will be added as an EDOC record, linked to the MetadataProfile.)

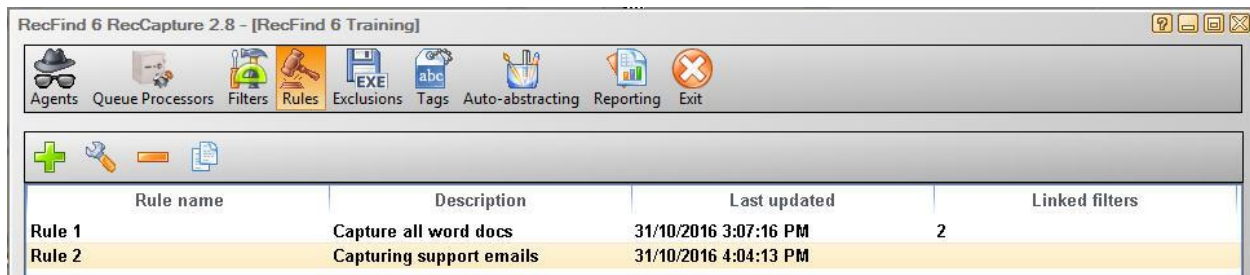
Create MetadataProfile from tags: This will create a new MetadataProfile based on the MetadataProfile ExternalID tag embedded in the current document. If this is not present, the MetadataProfile record will not be created. (If the MetadataProfile record is created successfully, the document itself will be added as an EDOC record, linked to the MetadataProfile record.) (See the Manage Tags section for information on embedding tags in documents.)

Create EDOC only: This will create an EDOC record in the RecFind 6 database only, with the captured document as the EDOC record's attachment.

Ignore it: This will not capture the file, and it will not be stored within the RecFind 6 database.

Security: This setting will determine the security level of the newly created record.

Now that we have completed our rule we click OK on the Mappings screen and RecCapture displays our new rule.



Rule name	Description	Last updated	Linked filters
Rule 1	Capture all word docs	31/10/2016 3:07:16 PM	2
Rule 2	Capturing support emails	31/10/2016 4:04:13 PM	

However, the rule needs to be linked to a filter before it can do any work.

Filters

We now need to examine is how to configure filters. Please click on the manage filters button (after clicking the agent button on the main toolbar).



Important

- One agent can have multiple filters associated with it and one filter can be linked to multiple rules.

- *You must have at least one rule defined before you can configure a filter.

*This last point means we need to configure a Rule before we can configure a filter.

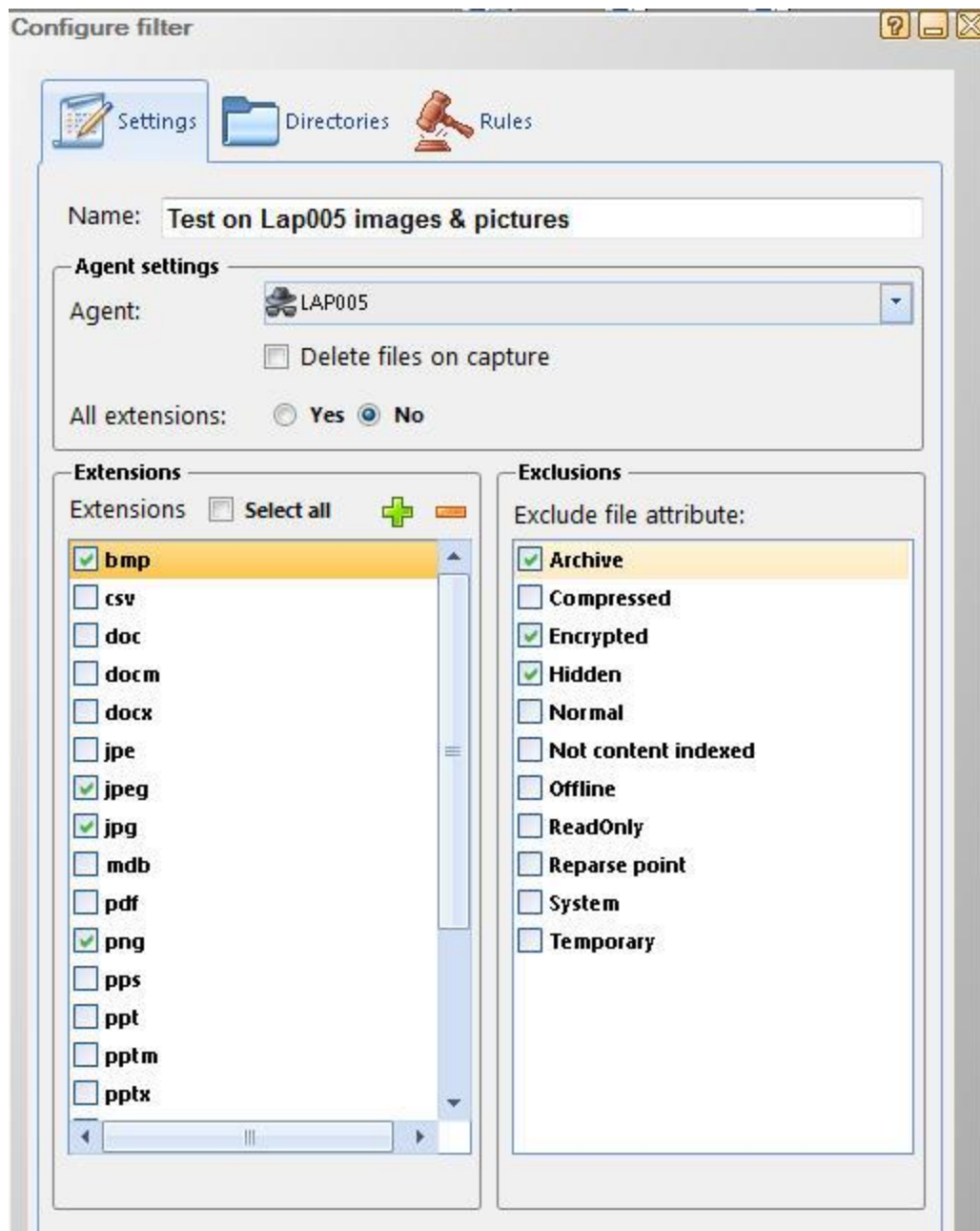
Let's now add our filter and link it to our rule.



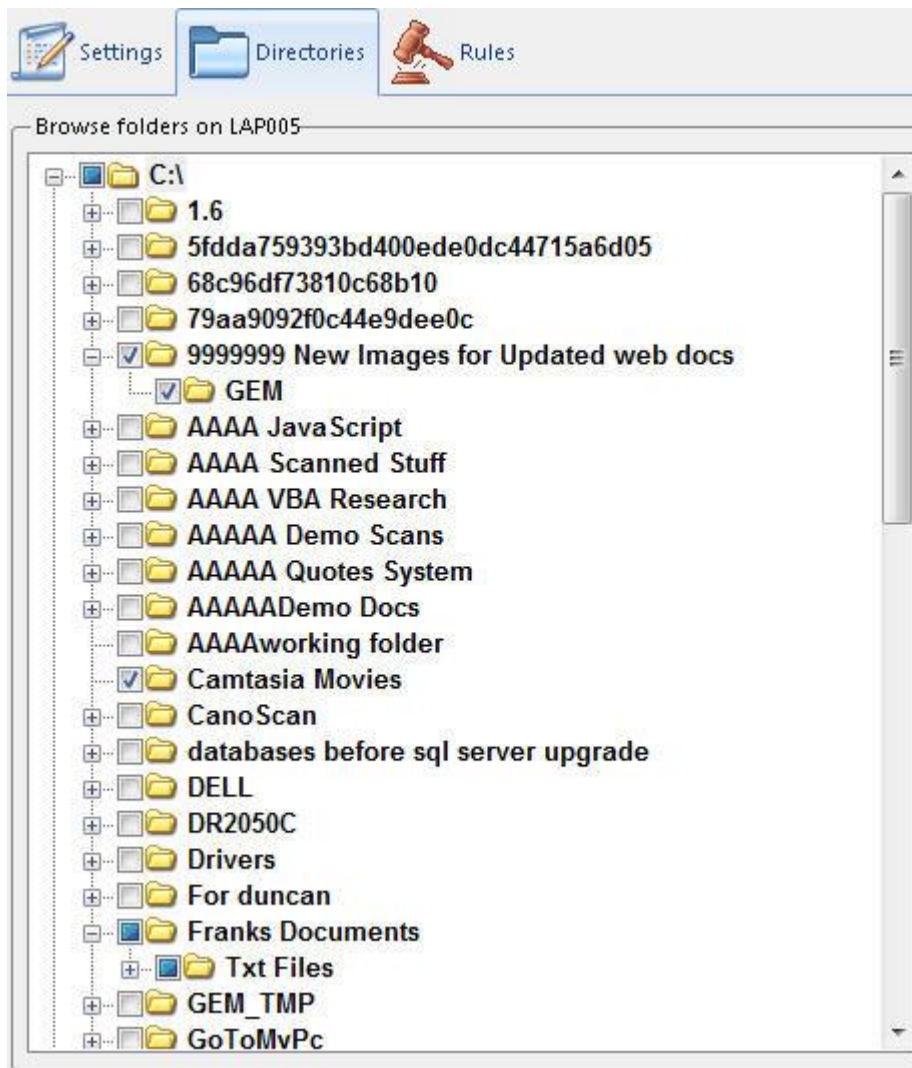
Click on the 'add new filter' button as follows:



You will see the following screen:

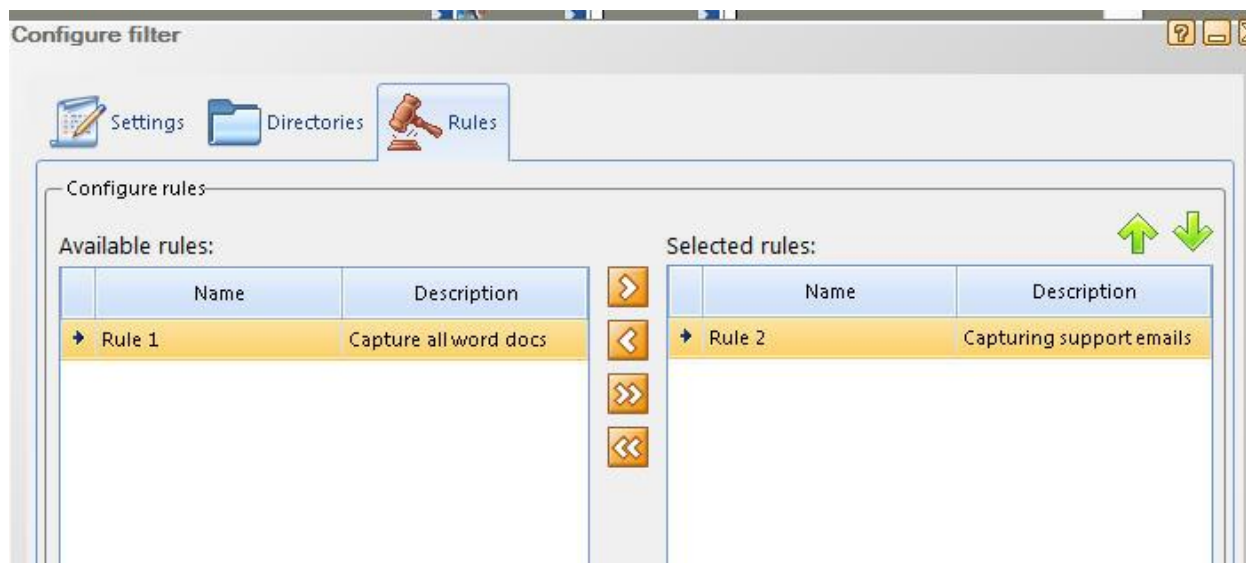


We need to first make our selections and then link this filter to a rule. My selections for this example as above:



Now select rule(s) for your filter.





Summary

RecCapture works because it allows you to replicate the human classification process. It allows you to analyze all of the properties of any electronic document in the same way that a human expert classifier would and then consistently apply a set of rules to determine if and how each document should be captured, stored and indexed.

The huge advantage RecCapture has over a human team is that it is infinitely faster and infinitely more consistent. Human beings are by their very nature inconsistent in the way they apply logic to the analysis and classification of a huge number of electronic documents; RecCapture is 100% consistent. Human beings become tired, irritable, annoyed, careless and sometimes just plain contrary. RecCapture just does precisely as it has been told day in and day out in a one-hundred percent consistent and totally reliable manner. Human beings make mistakes; RecCapture does not make mistakes.

Traditional client or user centric electronic document management systems have failed and failed because of the immense workload and responsibility they place on ordinary end users. The expectation that each and every end user will magically become an 'expert' is ludicrous just as is the expectation that each and every end user will embrace the capture and classification tasks with joy and unbridled enthusiasm.

Human beings are not machines. Human beings do not always do as they have been told. Human beings do not always cooperate. Human beings do not always operate at optimum efficiency. The user or client centric model is doomed to failure because of the false premise and assumption that every end user will happily become an expert and all users will have equivalent skills and knowledge and capabilities.

The RecCapture server-centric, rules-driven and fully automatic architecture is the only way any organization can implement and roll out and benefit from a one-hundred percent consistent and reliable enterprise document management system.

