



CAPSYS CAPTURE XML IMPORT

Version 1.2

CAPSYS Product Management
2-11-2015

Overview

XML (Extensible Markup Language) is a markup language that defines a set of business rules for describing and encoding documents in a generally accepted format which is human and machine readable. XML is defined by the W3C's "XML 1.0 Specification" and by several other related specifications - all of which are free, open standards.

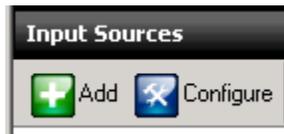
The CAPSYS CAPTURE XML Import Module is based on the XML specification and is designed to allow a variety of documents in varying formats such as TIF, JPGS, Microsoft Office documents, medical images, and/or other business related documents, when accompanied by a corresponding XML file, to be imported into CAPSYS CAPTURE in an automated fashion. The XML Import Module monitors the directory and when populated with an XML file, automatically picks up the corresponding file(s) for processing in the system based on how the capture process was designed.

XML Importer is a licensed CAPSYS CAPTURE Input Source and requires your license file is updated to support the use of XML Importer. Contact Sales or Technical support for pricing and licensing information.

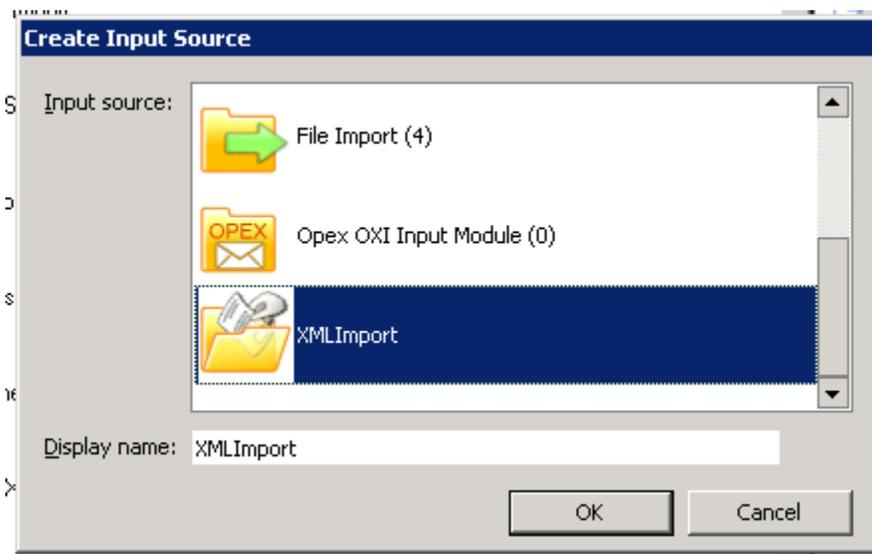
The following documentation describes how to add, configure and implement the CAPSYS CAPTURE XML Import Server module.

XML Import Configuration Process

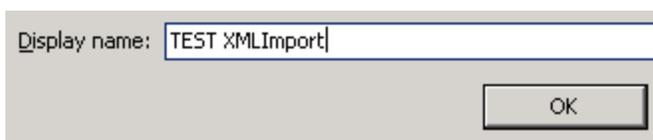
1. **Open** Server Manager
2. **Select** the Server Group in which to add the import process.
3. Click the **Add** button under Input Sources



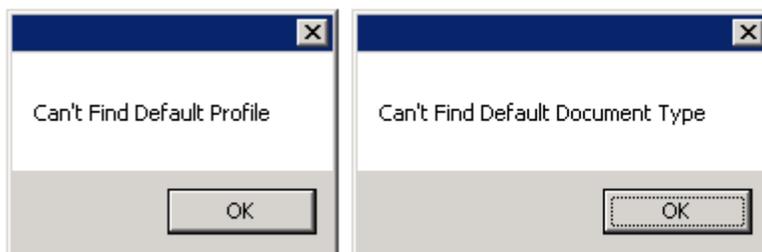
4. Scroll down to **select** the XMLImport source.



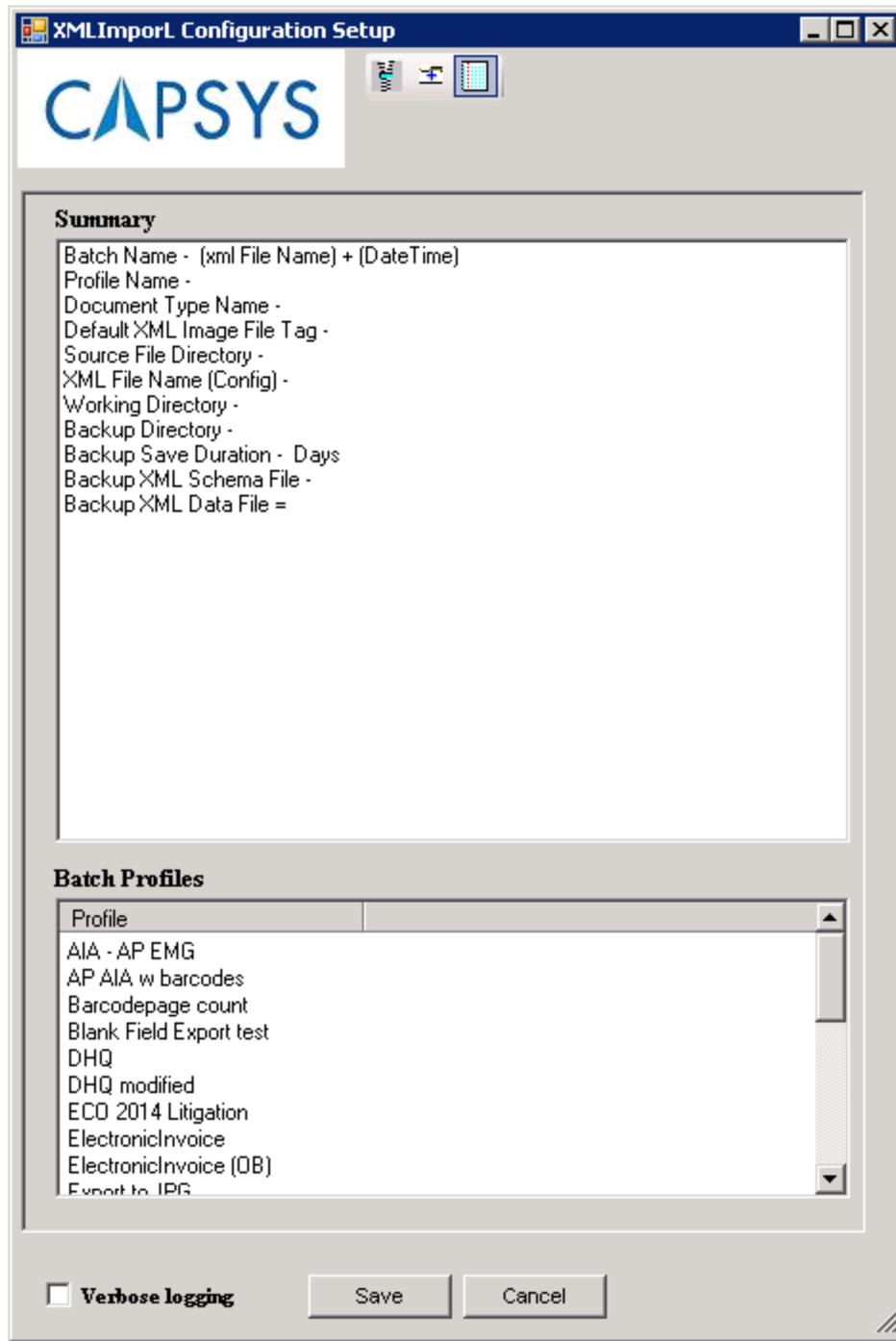
5. Modify the Display name with a desired name for this import process. Then click OK.



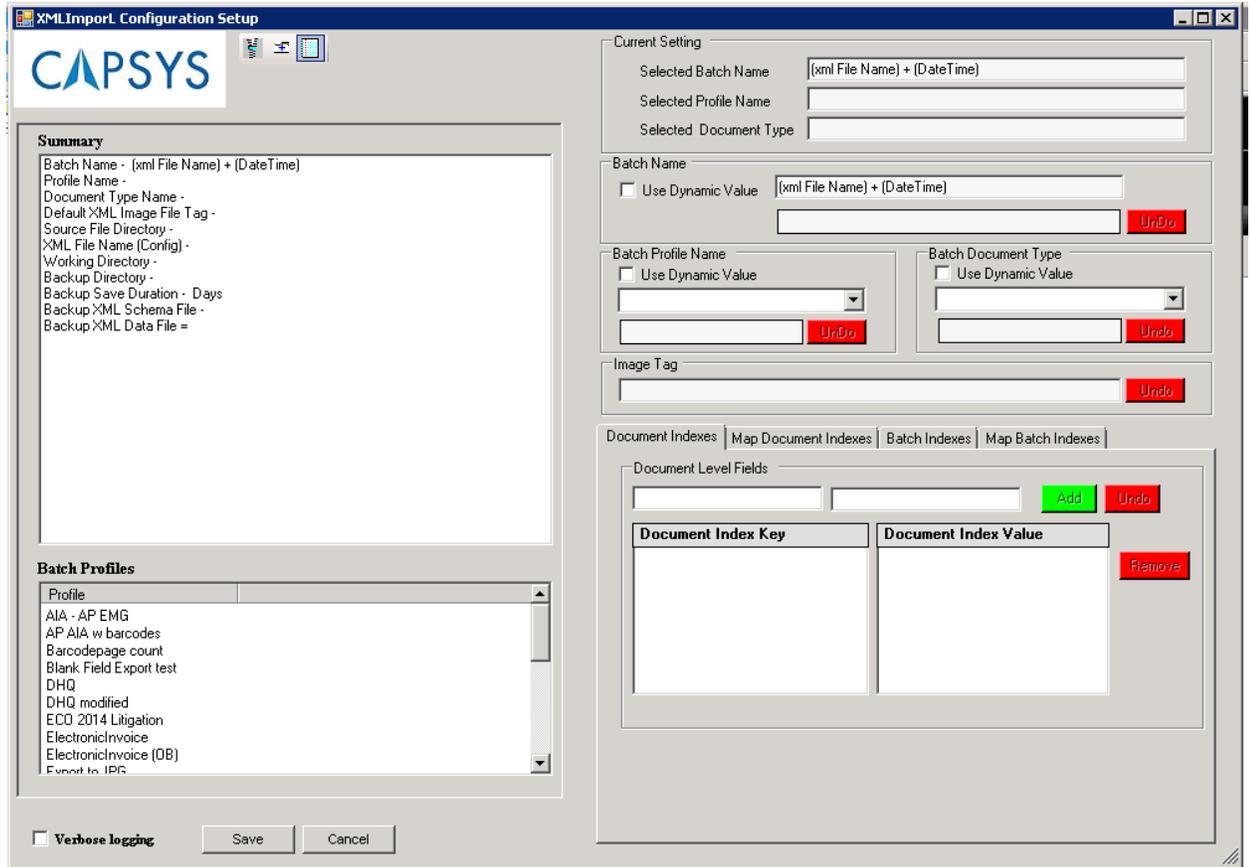
6. Select the import process just created and click the Configure button.
7. You may see some warning messages. This is ok. Just click OK each time.



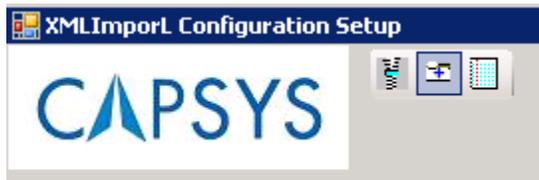
8. This will open the Configuration Setup window.



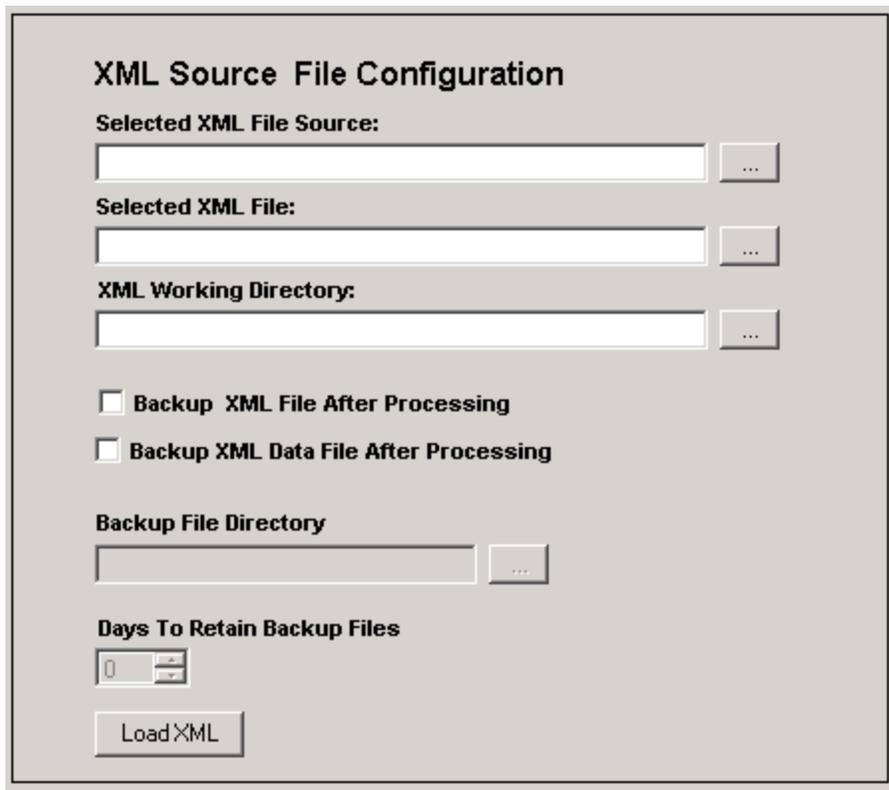
9. Resize the window by dragging the right edge or bottom right corner of the window to the left. So that the window will look like this:



10. Click on the Configure XML Source button. Center button among the three buttons in the upper left corner.



11. Fill in all of the path information.



The image shows a dialog box titled "XML Source File Configuration". It contains several input fields and checkboxes. The fields are: "Selected XML File Source:" with a text box and a browse button (...); "Selected XML File:" with a text box and a browse button (...); "XML Working Directory:" with a text box and a browse button (...); "Backup File Directory:" with a text box and a browse button (...). There are two checkboxes: "Backup XML File After Processing" and "Backup XML Data File After Processing", both currently unchecked. Below the checkboxes is a "Days To Retain Backup Files" spinner box set to 0. At the bottom left is a "Load XML" button.

12. Selected XML File Source: This is the path that the import process will be monitoring for XML files to import.

13. Selected XML File: This is the path to a specific XML sample file that represents the structure of the XML files that will be imported. This file is only used for the configuration steps to follow.

14. XML Working Directory: This is a path that the import process will use to temporarily store data as it processes the XML files. Performance will be best if this is a path that is local on the server that is running the Capsys Capture Server service.

15. Check the backup options as needed, and provide a backup path for Capsys to store the files after they are processed.

16. After the path information is entered, click the Save button. Then click the Load XML button.

Verbose logging

XML Source File Configuration

Selected XML File Source:
 ...

Selected XML File:
 ...

XML Working Directory:
 ...

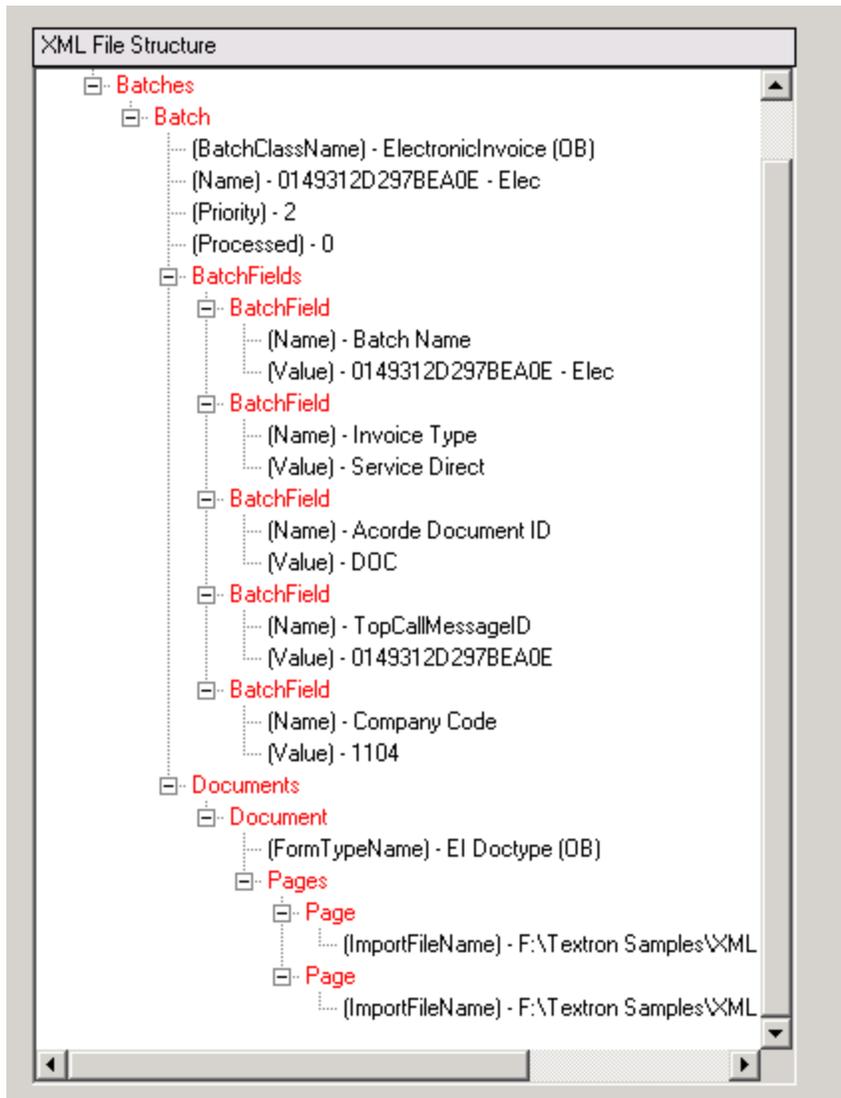
Backup XML File After Processing

Backup XML Data File After Processing

Backup File Directory
 ...

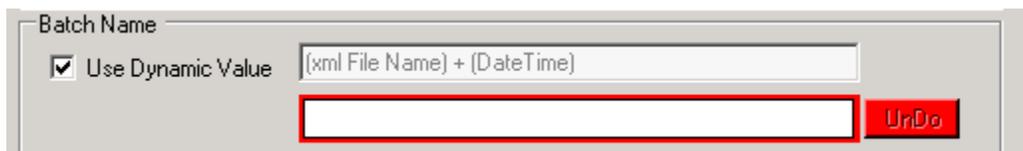
Days To Retain Backup Files

17. The sample XML file will be displayed with all of the Nodes.

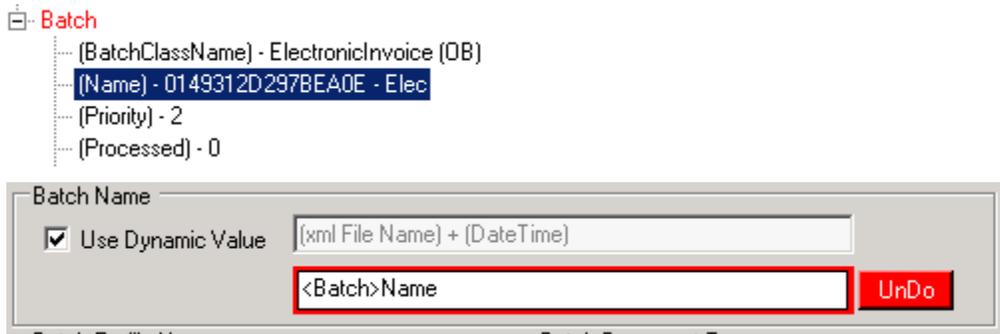


18. Next, all of the elements needed to create a batch must be provided in the panel to the right of the XML File Structure. This is done by dragging elements from the XML File Structure panel over to the appropriate box.

19. If the XML file will contain a value to be used in naming the batch that is created in Capsys, check the box Use Dynamic Value under the Batch Name.



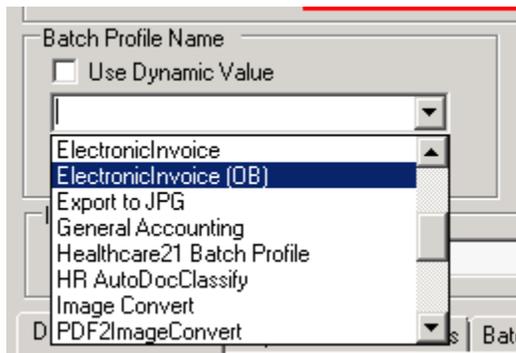
20. Find the element that contains that value for batch name and drag it over to the red Batch Name box.



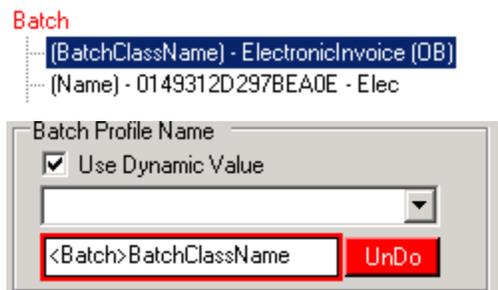
This will also populate the Selected Batch Name box.

If a dynamic batch name will not be found in each XML file, the batch will have the default name consisting of the XML file name and the Date/Time of import.

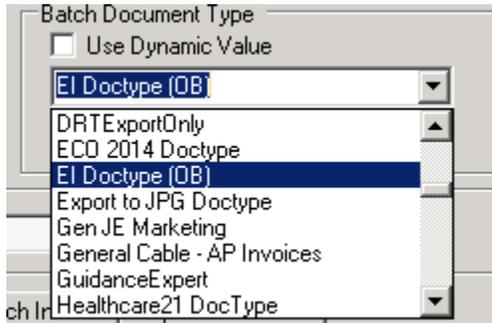
21. Under the Batch Profile Name section, you can either use the drop-down to select a Capsys batch profile to always use, or check the box Use Dynamic Value.



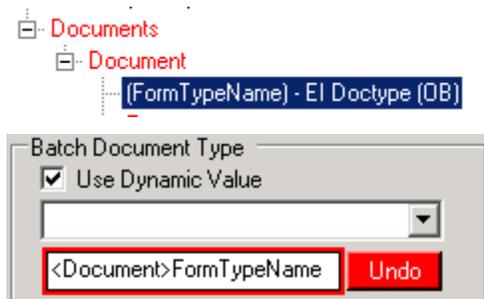
22. If a dynamic value is used, find the element in the XML File Structure that will contain the name of the batch profile. Drag it over to the red box.



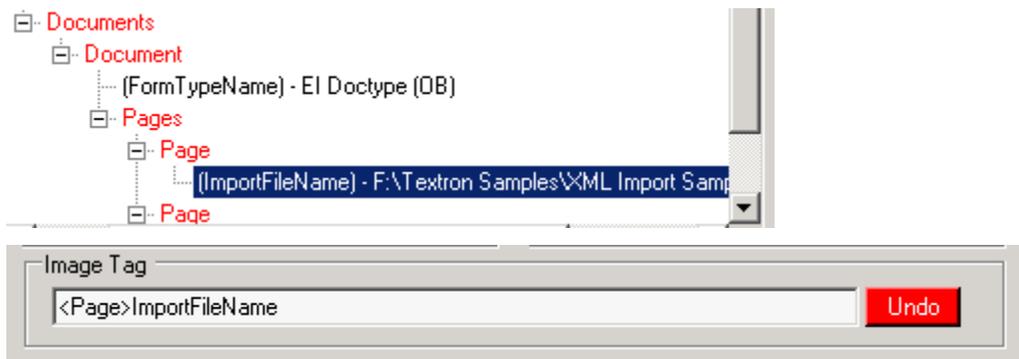
23. Under the Batch Document Type section, you can either use the drop-down to select a Capsys document type to always use, or check the box Use Dynamic Value.



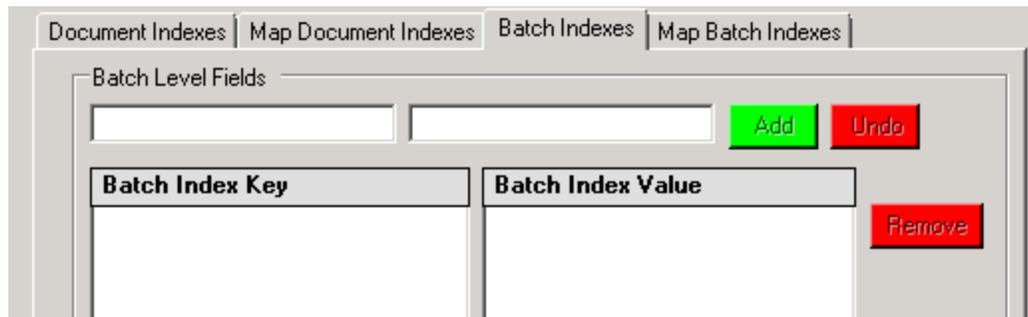
24. If a dynamic value is used, find the element in the XML File Structure that will contain the name of the batch profile. Drag it over to the red box.



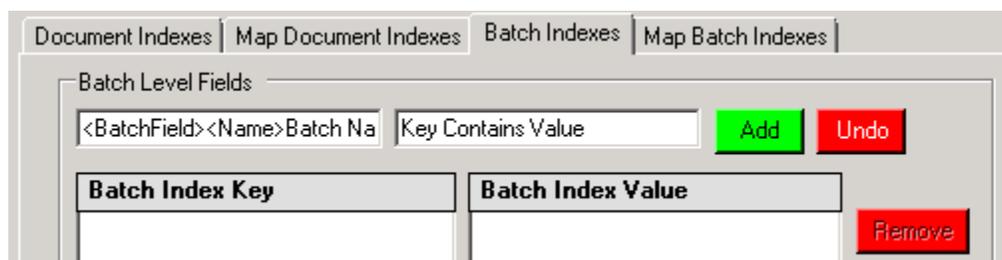
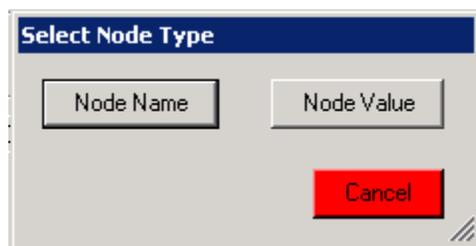
25. Find the element in the XML File Structure that contains the path to the image files. Drag it over to the Image Tag box.



26. If the XML file contains batch index values, these elements need to be added using the Batch Indexes tab. Click on the Batch Indexes tab.

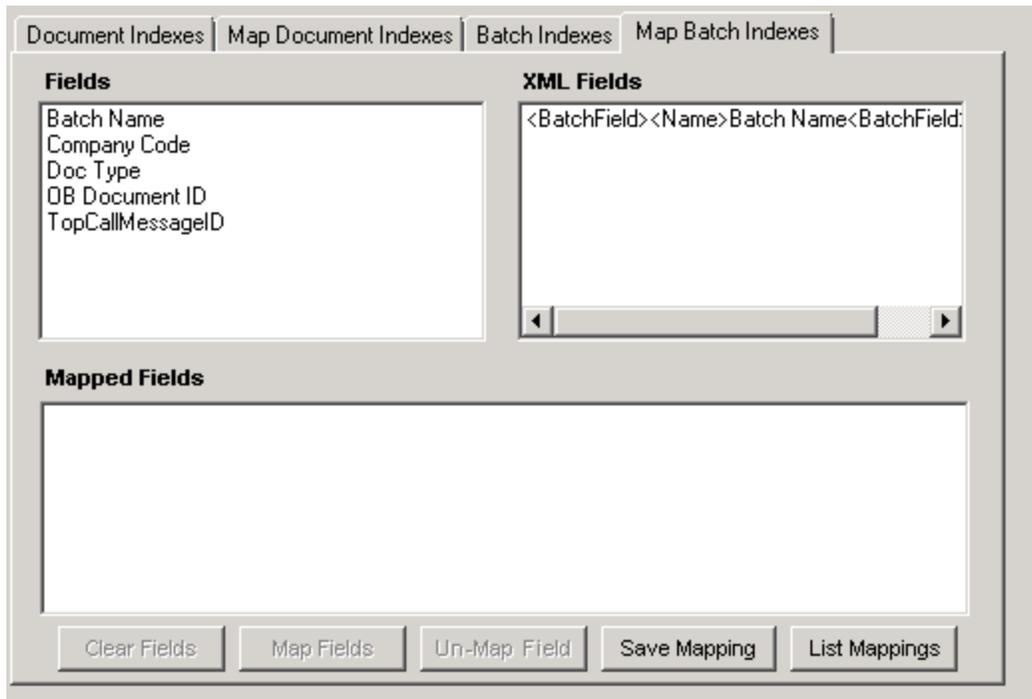


27. Find the element that contains the name of the batch index field in Capsys. Drag it over to the left box. Select which part of the node actually contains the value for the name of the field. In this case, the value of this node contains the name of the index field. So click the Node Value button.

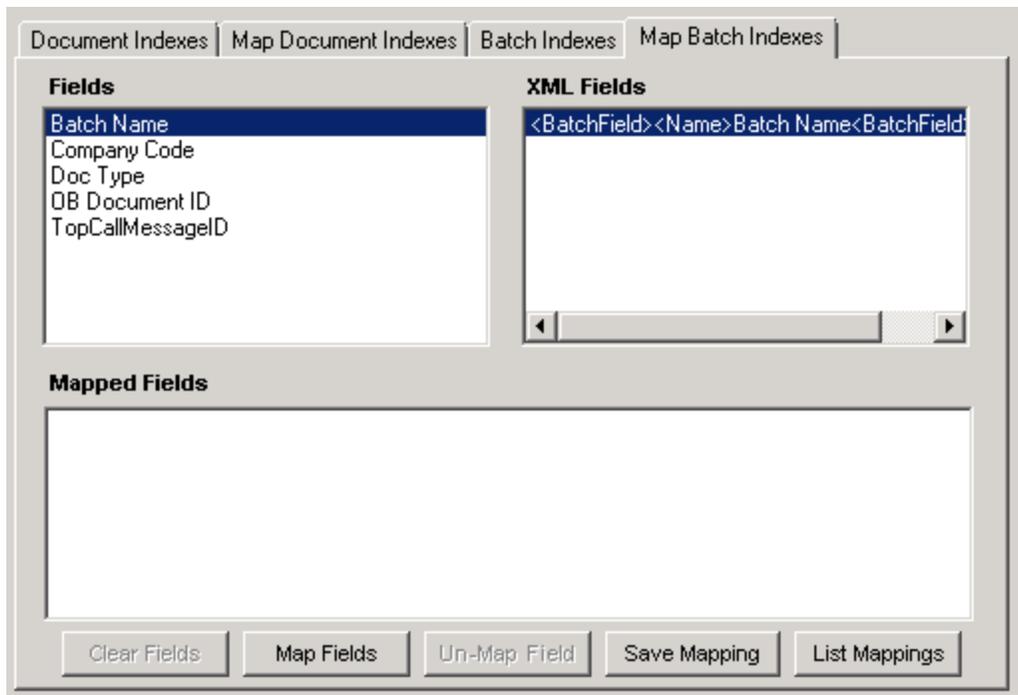


28. Find the element that contains the value that will populate that batch index field each time an XML file is imported and a batch is created. Drag it over to the right box. Select which part of the node contains the tag that identifies the data that will actually populate the field. In this case, the name of the node is what you want. Because the (Value) tag is what will always identify where to find the actual data that will populate the field. So click the Node Name button.

31. Select the Map Batch Indexes tab.



32. Select the Field on the left and XML Field on the right that correspond to each other. Then click the Map Fields button.



33. The mapping will appear under Mapped Fields.



34. Do this for each of the batch index fields. Then click the Save Mapping button.

35. If there are document fields to map, follow the same procedure using the Document Indexes and Map Document Indexes tabs. Make sure you save the mapping after you are done.

36. This completes the configuration. BE SURE TO CLICK THE SAVE BUTTON BEFORE CLOSING THE WINDOW.



End of Configuration