Kofax MarkView

Administrator's Guide for Oracle E-Business Suite, Volume 1

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KOFAX

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Preface

The *Kofax MarkView Administrator's Guide, Volume 1*, describes how to administer the MarkView system. This guide describes how to configure and maintain the applications, solutions, and users that make up the MarkView suite. The guide also describes how MarkView influences the administration of other servers and software that interface with MarkView applications.

The MarkView Administrator should be well-versed in database administration, application server setup, tuning and maintenance and so forth, or should know where to get such information. The administrator's guide does not replicate this information, but conveys MarkView product-specific information.

Who should read this guide

The following audiences should use this guide:

- MarkView administrators, who are responsible for day-to-day administration of the MarkView suite. Although these administrators may be familiar with enterprise software administration, they may not be familiar with MarkView.
- Oracle Database administrators, who perform the core database object installation and configuration. These administrators should be familiar with Oracle database conventions and be comfortable running and editing PL/SQL scripts. The *Kofax MarkView Administrator's Guide, Volume 2* covers advanced administration tasks.

Before using this guide, the administrator should have completed MarkView Level 1 training.

Where to find answers

Information category	Where to look	Questions answered
System maintenance	Perform system maintenance on page 17	What level of experience should I have to perform which tasks? What must I do on a daily, weekly, or monthly basis? What are the correct shut down and start up sequences to use? How do I repair or remove server software for different MarkView components? How do I update the MarkView system or apply patches?
Initial MarkView setup	Set up organizations on page 51	How do I add organizations to MarkView?

Information category	Where to look	Questions answered
MarkView setup management	Maintain organizations on page 51	How do I change the workflow for an organization? How do I define Sub Types? How do I adjust the percentage of invoices that undergo reviews? How do I change the high-dollar amount that requires an invoice to undergo review? How can I reduce the possibilities of fraud? How can I keep my system secure?
	Configure Accounts Payable settings on page 83	How do I change the frequency of MarkView notifications? How do I change what appears on the MarkView cover page?
	Set up MarkView Viewer on page 97	How do I give a user group access to the viewer?
	Configure MarkView for Expense Management on page 107	How do I add instructions to the interface for employees to follow when submitting expense reports?
	Monitor queues with Process Monitor on page 120	How do I create configurations in the Process Monitor to monitor queues? How do I ensure that invoices on hold do not get stuck?
Managing MarkView users	About MarkView users, user groups, and roles on page 136	What is a MarkView User Group? What is a MarkView Role? What are the default MarkView User Groups and Roles? How do I add users to MarkView and why? How do I add user groups and roles to MarkView and why? How do I assign users to user groups and roles? How do I set up alternate users when an employee is out unexpectedly?
	Configure MarkView menus on page 157	How do I control which menu options a MarkView user sees? How do I manage what actions a MarkView user can take in MarkView Viewer?
	MarkView approval hierarchy on page 162	How do I set up a MarkView approval hierarchy?
Add-on product maintenance	Maintain MarkView add-on products on page 171	How do I set up and configure the Self-Service Invoice application? How do I set up MarkView to print batches of invoices?
Utilities	Invoice Audit on page 192	How do I use the Invoice Audit utility? What format should I use when creating the csv file?

Information category	Where to look	Questions answered
Preferences	About MarkView preferences on page 194	When should I change a preference and which ones am I most likely to change? What is the difference between a system-level preference, a group- or role-level preference, and a user-level preference?
	MarkView preferences on page 201	Where can I find the preference settings to use?

Related documentation

The documentation set for Kofax MarkView is available online:[1]

https://docshield.kofax.com/Portal/Products/MarkView/10.5.0-yw2qf8m7r6/MarkView.htm

In addition to this guide, the documentation set includes the following items:

Kofax MarkView Features Guide

Use this guide to learn about the features included and options available with MarkView; to become familiar with MarkView products; and to decide which are important to the business challenges you face and best suit your site. This guide includes information about how features impact the workflow, the interaction between features, the touch points with the ERP system, and how features address business problems.

Kofax MarkView Planning Guide

Use this guide to learn about the prerequisites for implementing MarkView products. This guide includes system information, such as the protocols required for communication between servers, hardware and software prerequisites, and minimum RAM requirements.

Use this guide in conjunction with the *Kofax MarkView Technical Specifications* document on the Kofax MarkView Product Documentation site to prepare a site for product installation.

Kofax MarkView Installation Worksheet

Use this worksheet to collect and record the information you need to install or upgrade MarkView products.

Kofax MarkView Installation Guide

Use this guide in conjunction with the *Kofax MarkView Installation Worksheet* to install and configure MarkView products and to configure third-party products that integrate with MarkView.

Kofax MarkView Upgrade Guide

Use this guide in conjunction with the *Kofax MarkView Installation Worksheet* to upgrade and configure MarkView products.

1 You must be connected to the Internet to access the full documentation set online. If the security policy for your organization requires offline access (without an Internet connection), see the Installation Guide.

Kofax MarkView Integration Guide

Use this guide in conjunction with the *Kofax MarkView Technical Specifications* document on the Kofax MarkView Product Documentation site to learn about the prerequisites for implementing Kofax products and preparing a site for product installation.

Kofax MarkView Reintegration Guide for Upgrades to Oracle E-Business Suite R12 or 12.2

Use this guide to reintegrate MarkView after an upgrade to Oracle E-Business Suite R12 or 12.2.

Kofax MarkView Administrator's Guide, Volume 2

Use this guide to maintain MarkView components that are administered outside of the MarkView interface. This guide includes advanced administrative tasks and describes MarkView custom packages and join points.

Kofax MarkView Release Notes

Use this document to learn what is new with the latest MarkView release, identify outstanding defects and workaround solutions where applicable, and learn which defects the release fixes.

Kofax MarkView Technical Specifications

Use this document to learn about supported operating systems and other system requirements.

Getting help with Kofax products

The Kofax Knowledge Portal repository contains articles that are updated on a regular basis to keep you informed about Kofax products. We encourage you to use the Knowledge Portal to obtain answers to your product questions.

To access the Kofax Knowledge Portal, go to https://knowledge.kofax.com.

The Kofax Knowledge Portal is optimized for use with Google Chrome, Mozilla Firefox, or Microsoft Edge.

The Kofax Knowledge Portal provides:

- Powerful search capabilities to help you quickly locate the information you need.

  Type your search terms or phrase into the **Search** box, and then click the search icon.
- Product information, configuration details and documentation, including release news.

  To locate articles, go to the Knowledge Portal home page and select the applicable Solution Family for your product, or click the View All Products button.

From the Knowledge Portal home page, you can:

- Access the Kofax Community (for all customers).

  On the Resources menu, click the **Community** link.
- Access the Kofax Customer Portal (for eligible customers).

  Go to the Support Portal Information page and click **Log in to the Customer Portal**.
- Access the Kofax Partner Portal (for eligible partners).

  Go to the Support Portal Information page and click **Log in to the Partner Portal**.

- Access Kofax support commitments, lifecycle policies, electronic fulfillment details, and self-service tools.

  Go to the Support Details page and select the appropriate article.

Chapter 1

Perform system maintenance

This chapter describes the administration tasks needed to maintain and optimize MarkView system performance.

Administrative tasks

Identify administrative tasks

Although some of the following tasks are completed as part of the initial MarkView installation and configuration, you may need to perform the tasks again or use administration features to maintain the MarkView system.

To minimize disruption to MarkView users, perform system administration and maintenance when the system is quiet. Also, be aware of your company's change-management processes when making changes to the MarkView system. For example, first make your change in a non-production environment, have an appropriate user validate the change, then coordinate with the appropriate parties before migrating the change to the production environment.

Basic administrative tasks

Tasks that you are likely to perform frequently include:

- Performing regular system maintenance (see Maintain the system).
- Assigning Alternate users (see Manage alternate users).
- For MarkView for Accounts Payable, creating messages for return reasons (see Configure Invoice Return Reasons).

Tasks that you will perform infrequently are usually part of initial system setup and include:

- Setting up organizations (see Set up organizations).
- Mapping Automatic User Setup and Synchronization (AUSS) users (see Set up MarkView users with AUSS).
- Granting menu authorization to groups (see Assign menu items to user groups).
- Creating Sub Types and assigning users to the associated roles (see Define Sub Types).
- Configuring status notifications (see Change the frequency of Web Inbox notifications).
- Maintaining MarkView for Accounts Payable by:
  - Mapping Accounting Details to a an organization (see Map Accounting Details to an organization).
  - Setting up hold routing (see Establish routing based on PO Holds).

- Configuring MarkView hierarchies if you are not using the Oracle hierarchy and need to set up a hierarchy (see MarkView approval hierarchy).

For configuring options, provide expense report submission instructions (see Provide submission instructions).

Advanced administrative tasks

The following administrative tasks are also performed infrequently, but require a higher level of MarkView knowledge and training than that required for completing basic administrative tasks.

- Adding user groups (see Manage MarkView user groups).
- Adding users to MarkView (see Manage users).
- Adding roles (see Manage user roles).
- Configuring Form Block Functions (see Assign ERP responsibilities to MarkView organizations).
- Configuring how work items open (see Control how Work Items open).
- Creating menus (see Configure MarkView menus).
- Setting up Document Library (see Set up MarkView Document Library)
- Revising the bar code cover page setup (see the *Kofax MarkView Administrator's Guide, Volume 2*, Chapter 1, MarkView Custom Packages, "MVRM_BAR_CODE_CUSTOM").

Menus for performing administrative tasks

Administration Menu

Menu Option	Description
User Admin	• Change Password: Lets MarkView users change passwords. • Alternate User Assign: Lets you or the MarkView user reassign work items to another MarkView user.
MarkView Admin	Create and maintain MarkView users and user groups, and configure MarkView platforms, volumes, and preferences.
Process Admin	Administer the MarkView workflows including creating and maintaining process users and roles.
Module Admin	Administer business modules such as MarkView Accounts Payable, Organization, and Sub Type setup. These pages provide administrative access to database tables that exist outside the MarkView database objects.
Verify MarkView	Ensures that the Application Server is properly installed and that users can retrieve documents from the Document Server.
Work Item Details	Access the history and attributes of a work item.
Approval Hierarchy Admin	Manage the approval hierarchy within MarkView.
Load Hierarchy Data	Add MarkView hierarchy data from a .csv file. For the best results, use the AUSS feature instead of loading hierarchy data. For more information, see Set up MarkView users with AUSS.

Menu Option	Description
AUSS Mapping Administration	Set up Automatic User Setup and Synchronization (AUSS) to automate the process of maintaining MarkView users and user groups based on changes made in the ERP.
Migration Utility	Update the environment specific MarkView URLs and design time data after a database migration.
Automated Actions	Configure the system to automate some tasks associated with the invoice workflow.
Authentication Configuration	Configure the authentication method for MarkView: • MSAD: Microsoft Active Directory • OID: Oracle Internet Directory • LDAP: General LDAP Server

Utilities Menu

Menu Option	Description
Process Monitor	Provides a graphical view of the current status of business processes, and spreadsheet style views of the history and results of work performed to date.
Bar Code Generation	Creates bar code cover pages for document images being entered into the MarkView system.
Scan Batch Cover Page	Creates a standard page to accompany all batches scanned into the system.
System Status	Displays the results of status queries. To view the system status, the user must be a member of the Module Administrator user group.
Apps Version	Shows the version numbers of Oracle Applications installed on the system.
Interactive Queries	Generates online reports.

Web Inbox Menu

Menu Option	Description
AP Invoices	Displays items currently in the Web Inbox for AP invoices.
Supplier Documents	Lets the Web Inbox owner handle supplier documents routed to them.
Exception Documents	Lets the Web Inbox owner handle exception documents (such as rescan, manual review, and so forth) routed to them.

Web Inquiry Menu

Menu Option	Description
AP Invoices	Lets a user run queries to locate invoices in the ERP system.
Returned Invoices	Lets a user search for invoices that were returned to the supplier.

Prev Entered Menu

Menu Option	Description
Working Folder	Displays previously entered working folder documents and lets users attach documents to one or more existing invoices.

Document Library Menu

Menu Option	Description
Home	On the **Document Library** > **Home** page, lets users upload and search for documents to use in the MarkView system.
Admin	Lets the library administrator create and maintain user profiles, user groups and object types, modify object type properties, assign preferences and authorizations, and define search fields.

Maintain the system

About administrative roles

As a MarkView Administrator, complete the correct level of technical training and have the skill set required to administer the system. Each person who takes part in MarkView administration must complete the Level I technical training offered by Kofax.

Some administrative tasks require a higher level of training. Kofax offers Level II and Level III training to meet those requirements. For information about training, contact Kofax Education Services.

MarkView administrative roles that might be filled by one person or by multiple people include:

- Business Analyst: Primary point of contact for the MarkView system.
- Database Administration (DBA): The administrator of the database that contains the MarkView database schema and who has the ability and authority to perform database administration.
- ERP System Administrator: The administrator who performs general maintenance and updates on the ERP system that integrates with MarkView.
- Server Administrator: The administrator who maintains and updates the server environments that support MarkView.
- Desktop Administrator: The administrator who maintains and updates the Windows-based server environments supporting MarkView, and the desktop environments for the MarkView users.

About the required skill sets

The following table identifies the skills required to administer the MarkView system. Depending on your organization, these skills may be performed by one person, or by multiple people in different roles. Because each organization is unique, the following table identifies skills for a suggested role. The roles in your organization may differ.

MarkView System Administration

Skill Set	Business Analyst	DBA	ERP	Server Administrator	Desktop Administrator
Thoroughly understands the ERP setup	x	x	x		
Capable of understanding the MarkView architecture including basic technical aspects and communication protocols between MarkView components	x	x	x	x	x
Knowledgeable about the current ERP business rules and MarkView business process workflows	x		x		
Capable of taking responsibility for MarkView data setup and MarkView administration	x		x		
Capable of serving as facilitator/ coordinator for various IT projects and issue resolution	x				
Capable of determining the resolution path and who to involve regarding MarkView issues and questions	x				
Capable of understanding of the integration points between the ERP and MarkView	x	x	x		
Capable of managing MarkView Server applications		x	x	x	
Capable of installing MarkView Viewer on the end-user desktops					x
Capable of managing the MarkView schema and the database where the schema resides; able to run database scripts to gather information		x			
Completed MarkView Level I Training	x	x	x	x	x

Routine maintenance

Perform the tasks defined in this section on a regular basis to keep the system running smoothly. In addition to recurring tasks that you perform daily, weekly, and monthly, also perform the additional tasks required for applying patches.

The tables in the following sections identify the administrative role with the skill set to perform the tasks and the frequency at which to complete the tasks.

Regular maintenance also helps with troubleshooting efforts by serving as a benchmark. Some of the tasks that you should perform regularly include:

- Gather MarkView schema statistics to chart demand and performance trends. Do this weekly or as frequently as the DBA recommends.

- Configure your application server logging in accordance with your company requirements.
- For MarkView Capture and Output components, set the event log to a fixed, self-purging size, or to your company requirements.

Daily tasks

Daily Administration Tasks

Skill Set	Business Analyst	DBA	ERP	Server Administrator	Desktop Administrator
Thoroughly understands the ERP setup. Identify issues related to MarkView. For example, a user unable to process documents or problems with MarkView email. Respond to questions about the product, such as: • Capture and output • Approval and Approval Hierarchies • Document routing based on workflow configuration • Hold Routing Use the tools that Kofax provides for researching and identifying issues. For example, use SupportWeb to search for answers about messages, keywords, and MarkView component issues. As needed, log an issue with Technical Support.	x	x	x	x	x
Identify work items that fail to process in a workflow. For example, look for work items that fail to move from a queue. Run Support Diagnostic Tools to identify the problem. Take Return-To Actions. As needed, log an issue with Technical Support.	x				
If not using Automated User Setup and Synchronization (AUSS), manually add new users to the MarkView system and add them to the appropriate groups.	x		x		
Review, monitor, and act (as appropriate) on MarkView System Status Over Limit notifications.	x		x		

Weekly tasks

Weekly Administration Tasks

Skill Set	Business Analyst	DBA	ERP	Server Administrator	Desktop Administrator
Collect statistics in the MarkView schema using the recommendations by Technical Support	x	x	x	x	x
Review, monitor, and act (as appropriate) on MarkView System Status Over Limit notifications.	x		x		

Monthly tasks

Install patches

- Read the patch notes that accompany the patch.
- Update your test environment.
- Install the patch on your test environment. Coordinate and perform system tests and user acceptance tests (UAT) after installing the patch.
- Install the patch on your development environment.

Monthly Administration Tasks

Skill Set	Business Analyst	DBA	ERP	Server Administrator	Desktop Administrator
Coordinate patch installations and ensure that all environments remain up-to-date.	x				
Review, monitor, and act (as appropriate) on MarkView System Status Over Limit notifications. Archive all MarkView logs, including: • All Application Server logs • All Scheduler job logs		x		x	
Install the latest patches and fixes for MarkView components. (See the Kofax Customer Portal for current patchset and fix information.)		x	x	x	x
Study the impact of third-party patches and updates. As needed, apply patches to maintain third-party components. Third-party components can include database, ERP, operating system, and operating system security updates.		x	x	x	x

Skill Set	Business Analyst	DBA	ERP	Server Administrator	Desktop Administrator
Ensure that the test and production environments are at the same revision levels (both MarkView and the ERP) to facilitate testing.		x	x	x	
Coordinate and perform system testing and User Acceptance Testing (UAT) after applying changes or patches to the MarkView environment.	x				

Shut down and restart sequences

Shut down the system

If you shut down your ERP system for maintenance, stop the MarkView system before stopping the ERP system.

Use the following sequence when shutting down MarkView for maintenance:

1. Stop the MarkView Schema Database User DBMS_SCHEDULER jobs.
2. Stop the Capture and Output Components and stop Kofax Capture services.
3. Stop the MarkView Application Server.

Restart the system

If you shut down your ERP system for maintenance, restart the ERP system before restarting the MarkView system.

Use the following sequence when restarting your MarkView environment:

1. Start the MarkView Application Server.
2. Start the Capture and Output Components and Kofax Capture services.
3. Start the database DBMS_SCHEDULER jobs.

Maintain Kofax MarkView Export Connector

Repair Kofax MarkView Export Connector

1. On the Windows server where Kofax Capture runs, select **Start** > **Control Panel**.
2. Select **Add or Remove Programs**.
3. Right-click **Kofax MarkView Export Connector** and select **Change**.
4. Select **Repair** and click **Next**.
5. Follow the instructions that appear on the screen to repair Kofax MarkView Export Connector.

Remove Kofax MarkView Export Connector

To remove Kofax MarkView Export Connector, complete the procedures described next in the sequence shown.

Remove the Kofax MarkView Workflow Agent

1. In the Kofax Capture Administration module, select the **Batch** tab.
2. Right-click the batch class and select **Properties**.
3. Select the **Workflow Agents** tab.
4. Under **Selected Workflow Agents**, select **Kofax MarkView AutoSplit** and click **Remove**.

Remove Kofax MarkView Export Connector from a batch class

1. In the Kofax Capture Administration module, select the **Batch** tab and expand the batch class to view associated document classes.
2. Right-click the document class and select **Release Scripts**.
3. Under Assigned Release Scripts, select **Kofax MarkView Export Connector** and click **Remove**.

Remove Kofax MarkView Export Connector from Release Script Manager

1. In the Kofax Capture Administration module, select **Tools** > **Release Script Manager**.
2. Select **Kofax MarkView Export Connector** and click **Remove**.

Remove Kofax MarkView Export Connector

1. On the Windows server where Kofax Capture runs, select **Start** > **Control Panel**.
2. Select **Add or Remove Programs**.
3. Select **Kofax MarkView Export Connector** and click **Change**.
4. In the Application Maintenance window, select **Remove** and click **Next**.
5. Follow the instructions that appear on the screen to remove Kofax MarkView Export Connector.

Disaster recovery strategies

Use the guidelines in this section to prepare for unplanned system shutdowns or a compromise in datacenter operation. Implement these recommendations in accordance with your site policies and procedures regarding backup and recovery mechanisms.

The MarkView database and document servers contain run-time data and should have a backup strategy in place. For the best results, schedule database server and document server backups to occur at the same time as the ERP database backup. Back up the following:

- MarkView database schema: Make this part of a backup strategy that encompasses the financials database.
- MarkView document server: Include the file system of stored images (often on an SAN or LAN) and any required access components, such as an http server.

Taking an image of the following machines for backup is sufficient. However, if you update or change the server, update the backup image as well.

- MarkView Capture and Output servers (Bar Code, Print, and so forth), including a ghost image of the operating system. If you use MarkView OCR Invoice with Kofax, Kofax recommends re-imaging the Kofax OCR machine whenever you make a Kofax project change on the machine.
- MarkView Application Server and the file system that contains the application server configuration.

As an example of what you might be faced with in the aftermath of a system disaster, consider the following:

- Server failures affecting the database server and the document server occur at 2:00 PM.
- The database is restored to 1:59 PM.
- The document server is restored to 11:00 PM the previous night.

In this a scenario, any documents added to the document server between 11:00 PM and 1:59 PM would not be available because the TIFF images do not exist. The documents must be re-entered and the associated work items recycled. This is because the database records are newer than the documents.

The best way to eliminate or reduce this recovery effort is to synchronize as closely as possible the respective backups of the database server and the document server. Ideally, this should occur during a quiet period for the document server when no new images are being entered.

For the best results, have full mirrored systems for all machines. Or, have images of the Capture and Output hosts, and complete full backups of the document server and the database server to use to restore the servers on other machines.

Recover from a database failure

1. **Stop** Import Server instances to prevent the server from trying to import documents when the database is unavailable.
2. Stop Capture and Output and Kofax Capture components.
3. Stop MarkView Application Server applications.
4. Resolve the database issues and restart the Oracle database server.
5. Restart all MarkView Application Server applications.
6. Restart Import Server instances.

You do not need to restart the following components after a database restart because they reconnect to the database automatically:

- Import Server
- Bar Code Server

You do not need to restart any Kofax services because they do not connect to the database.

> If you configured Kofax Capture to leverage a schema on the Oracle database, restart Kofax Capture if the database restarts.

Recover from an application server failure

1. Stop the following components:
   - Import Server instances
   - Bar Code Server service
2. Resolve the application server issues.
3. Restart the MarkView Application Server.
4. Restart the following components:
   - Any DBMS_SCHEDULER jobs that failed when the application server stopped
   - Import Server instances
   - Bar Code Server service

Verify the system restart

1. Confirm that startup did not generate any alert logs in the database.
2. Confirm that MarkView Application Server applications are running.
3. Confirm that DBMS_SCHEDULER jobs are running.
4. Confirm that all MarkView Capture and Output services started without error events.
5. Confirm that all Kofax Capture services started without error events.

Chapter 2

Set up MarkView users with AUSS

Automated User Setup and Synchronization (AUSS) maps user Source System Groups to corresponding MarkView Groups and Roles through MarkView Profiles. This mapping provides MarkView users with privileges required for the tasks they perform in MarkView. Thus, AUSS leverages user information from Oracle E-Business Suite or Microsoft Active Directory Service without requiring an administrator to manually recreate it in MarkView per each Source System user. You can also use MarkView Profiles to add users to default user groups associated with organizations.

When integrated with Oracle Source System, ensure that the users to be synchronized have a valid email address in their Oracle HR record. Oracle users without email addresses cannot participate in MarkView workflows. The user must have an entry in the FND_USER and PER_ALL_PEOPLE_F tables in the Oracle APPS database schema. The FND_USER and PER_ALL_PEOPLE_F tables are joined by the EMPLOYEE_ID and PERSON_ID fields.

The following table contains terms and definitions used in AUSS.

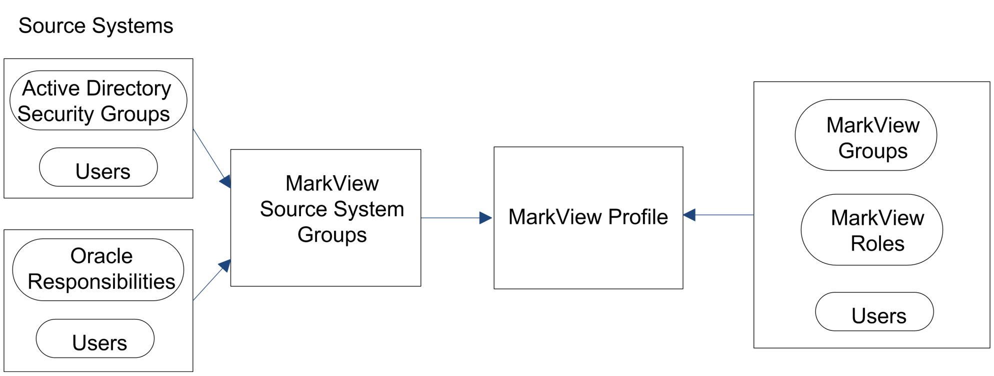
Term	Description
Source System	The system from which AUSS loads user information into MarkView. Your options are Oracle E-Business Suite (Oracle) and Microsoft Active Directory Service (Active Directory).
Source System Group	The AUSS term for Oracle Application Responsibilities and Active Directory Groups.
MarkView Profile	The profile that maps the Source System Groups to MarkView Groups and MarkView Roles.
MarkView Group	The group that determines user access to MarkView documents and related privileges in MarkView.
MarkView Role	Workflow functions the user can access.
Oracle Application Responsibility	The Oracle Source System Group to which an AUSS administrator maps MarkView Profiles.
Active Directory Group	The group in the Active Directory server to which an AUSS administrator maps. The users in Active Directory are members of security groups.
LDAP Search Filters	Search filters that select the entries on the LDAP server to be returned for a search operation.
LDAP Attributes Mapping	Mapping of LDAP user attributes to MarkView user attributes. Set Active Directory Attributes to manage Active Directory filter results.
Manually created MarkView user	A user created in MarkView by a MarkView administrator.

Term	Description
Source System user	A user in the Source System. If the user is synchronized, an account of the same user name is created/updated in MarkView.
AUSS managed user	Such MarkView user that is subject to synchronization: has or had at least one assignment to the Source System Groups added in AUSS setup.
Full synchronization	AUSS conducts a complete comparison of user accounts in the Source System and MarkView.
Initial synchronization	AUSS conducts a first-time full synchronization during which user information is transferred from the Source System to MarkView.
Incremental synchronization	AUSS looks for changes only since the previous synchronization.

About MarkView profiles

MarkView Profiles let you define the MarkView functionality available to users with different Source System Groups.

The following diagram shows the relationship between the Source Systems and MarkView. In this simplified diagram, the source system group is mapped to one profile; however, a source system group can be mapped to more than one profile.



Mapping Groups and Users to Profiles

AUSS includes 22 profiles with MarkView Groups and Roles already set up or you can create a profile. See Create or edit a profile. For example, a user assigned to the AP Entry Profile can process new invoices. That user can look at invoice images, enter invoices into Oracle, and request that the invoice be returned to the supplier or re-scanned.

MarkView provides the following default profiles.

Default Profiles

Profile	Description
Actions Manager	Responsible for performing Automated or Manual Escalate, Reassign, and Increase Priority actions.
AP Entry	Performs Invoice Entry for the Pre-Approved, Non-PO, PO, and Previously Entered Invoices workflows. This user can enable and disable roles for these entry functions through the User Role Select form in Oracle Applications.
AP Exception	The AP Exception user is responsible for processing items that were routed to an exception queue from invoice entry (such as Recycle and Returned Invoices). This includes processing items that were returned to AP from the Coding/ Approval process (such as asking questions or rejecting payment). This user also reviews AP Invoice Follow-up item errors.
AP Invoice Coder	Required only when the coding process is distinct from the invoice approval process and coders must manually select the first approver after completing coding through Accounting Details. This is not a typical configuration.
AP Manager	Responsible for ensuring the AP workflows are being processed effectively (through Process Monitor). This user is also responsible for assigning alternates to users when they are out of the office as well as reviewing potential invoice entry violations.
AP Resolution	Reviews items routed to AP due to an AP-related hold to be investigated and resolved in Oracle Applications. This includes responding to items that were returned to AP by other hold-resolution processing roles (such as Purchasing and Receiving).
Audit	Responsible for processing items in the Senior Financial Audit Required queue.
Confidential	Responsible for placing redaction annotations (blackout/whiteout) over sensitive data on document images to prevent users (not associated with this profile) from seeing that portion of the image.
Everyone	AUSS assigns MarkView groups and roles defined in this profile to every AUSS managed user. If you edit MarkView Groups or MarkView Roles for Everyone, AUSS updates MarkView Groups and MarkView Roles for all users when you perform synchronization. All AUSS managed users are members of the Everyone profile, which includes the COMMENTER role. The COMMENTER role gives all members the ability to request and respond to comments. Do not explicitly map the Everyone profile to a Source System Group or change the name or description of the Everyone profile. You cannot delete the Everyone profile.
Expense Manager	Responsible for viewing all expense documents.
Invoice Approver	Responsible for approving Non-PO Invoices for payment, including the ability to enter coding from the viewer.

Profile	Description
MarkView Admin	Administers the MarkView system through the following interfaces: • Module Admin • MarkView Admin • Process Admin • Alternate User Assignment • Interactive Queries Through Process Monitor, this user also reviews and corrects issues with work items that encounter errors and are routed to the Workflow Administration queue.
Process Monitor	A profile for users outside the MarkView Admin or AP Manager profiles who require access to Process Monitor to display in-process work items.
Purchasing	Responds to purchasing questions that arise during the PO Invoice Entry process and investigates and resolves purchasing related holds.
Review - Additional	Responsible for processing items in the Review Required queue.
Review - Freight	Responsible for processing items in the Freight Review Required queue.
Review - QA	Responsible for processing items in the QA Required queue.
Review - Tax	Responsible for processing items in the Tax Review Required queue.
Scan	Responsible for processing items in the Re-scan Review and Manual Review queue. This profile also grants access to the Bar Code Generation Utility.
SSI Users	Self-Service Invoice invoice requesters. This is valid for Oracle environments with SSI enabled only.
Supplier	Processes scanned documents to initiate the entry of a new supplier. This user responds to supplier-related questions including setup and changes to the supplier and site during the invoice entry process. This user also reviews Supplier Follow-up items that did not correctly attach.
Web Inquiry	A profile for users outside the MarkView Admin or AP Manager profiles who conduct invoice inquiry with MarkView.

Active Directory source system connection information

If you select Active Directory as a source system, you will need to specify the LDAP data.

Use this list as a reference for all fill-in fields in the **Source System** tab for Active Directory.

Field	Description
Active Directory Connection	

Field	Description
LDAP connection URL	<protocol>://<host>:<port>/<root> Where: <protocol> is the LDAP protocol, such as ldap or ldaps <host> is the LDAP server name or IP address <port> is the LDAP server port to which AUSS connects. Default: 389 <root> is the root entry of the LDAP server you are connecting to, such as dc=AUSS,dc=local
User name	LDAP admin user DN (Distinguished Name), such as CN=Administrator, DC=local
Password	LDAP admin user password
LDAP Search Filters	
User base DN(s)	The base Distinguished Name (DN) subtree that is used when searching for user entries on the LDAP server.
User search filter	Filter string for objectclasses required by AUSS: (objectClass=person)
Group base DN(s)	The base Distinguished Name (DN) subtree that is used when searching for group entries on the LDAP server.
Group search filter	Filter string for objectclasses required by AUSS: (objectClass=group)
LDAP Attributes Mapping (Objects such as Last Name are described by LDAP attributes. MarkView uses Attributes to filter Active Directory users for AUSS.)	
User name	LDAP user attribute for Common Name (CN) or logon account name (sAMAccountName)
First name	LDAP user attribute for first name (givenName)
Last name	LDAP user attribute for last name (SN)
Email	LDAP user attribute for email address (mail)
Source group	LDAP user attribute for user group (memberOf)

Run the MarkView AUSS Setup Wizard

1. Log in to MarkView and navigate to **Administration** > **AUSS Mapping Administration**.
   The **MarkView AUSS Setup Wizard** opens.
2. Follow the prompts of the **MarkView AUSS Setup Wizard**.
3. If you have the AUSS configuration backup file, click the corresponding link to upload it.

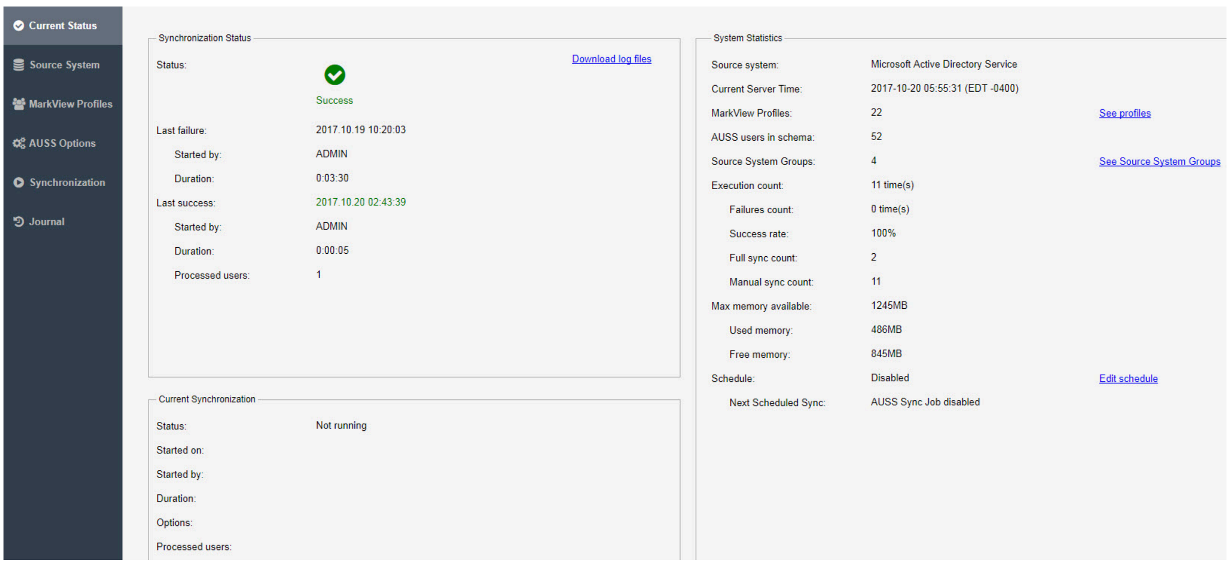
   With this file, you upload the information about your source system settings, initial user options, MarkView profiles, synchronization schedule, and notifications. When prompted to select the source system, continue with the previously used source system.

   For Active Directory Source System, the backup file fills in the source system connection information fields automatically.

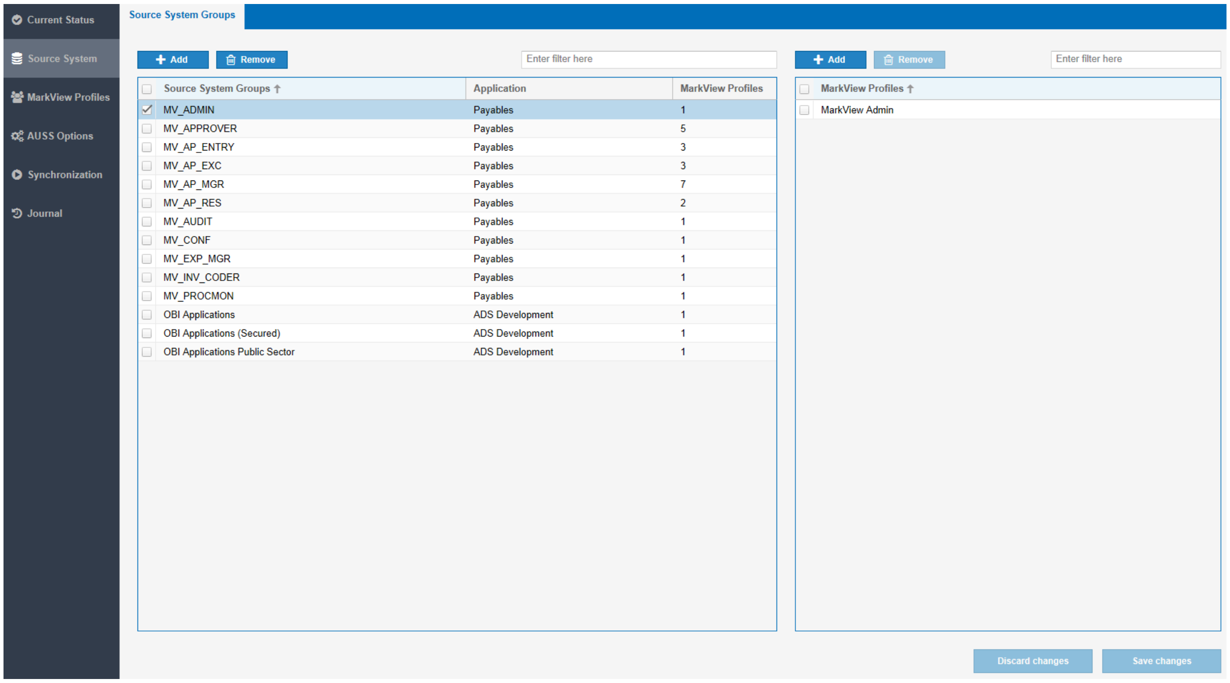
4. For Active Directory Source System only: After you fill in the source system connection information fields (see Active Directory source system connection information), click **Test connection**.
   - If you see an error message, verify if the field settings are correct.
   - If the test is successful, click **Next** and then apply changes.
5. Review the steps to complete the configuration and click **Go to AUSS Home**.

AUSS interface

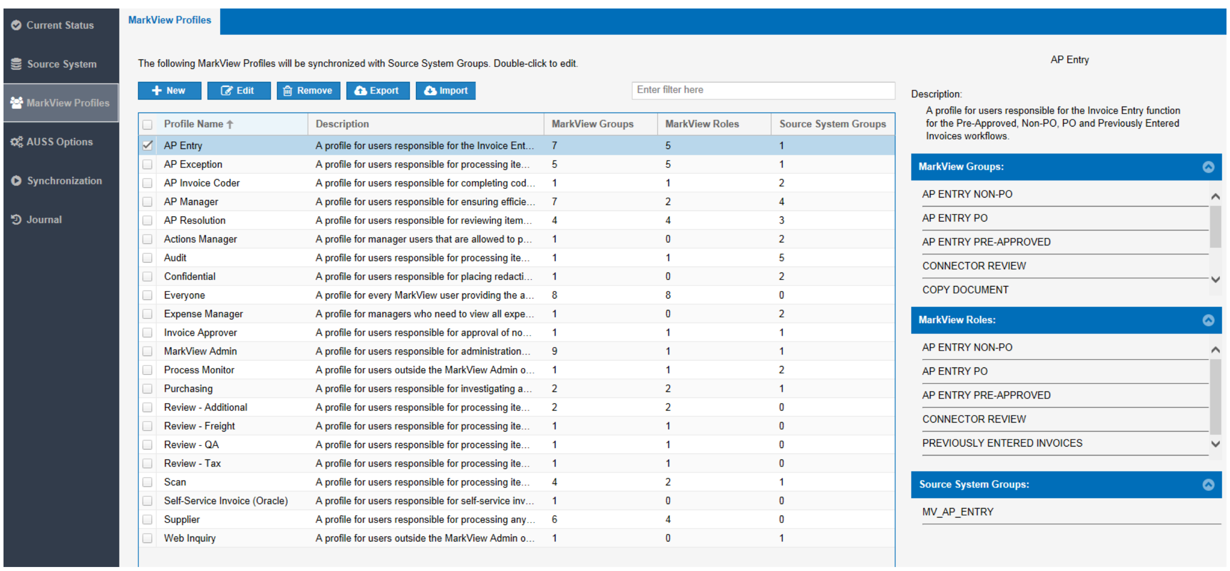
- **Current Status**: Displays the current AUSS status on near real-time basis. The visual refresh occurs every 10 seconds. See Current Status.



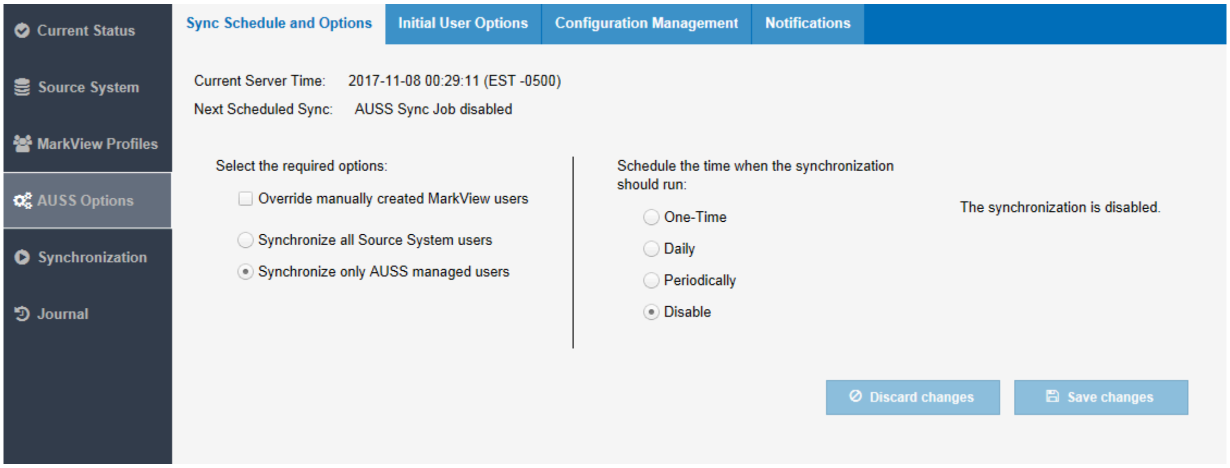
- **Source System**: Accesses Source System Groups information for both Active Directory and Oracle. If you use Active Directory as a source system, Source System also displays the Active Directory Connection tab, LDAP Search Filters, and LDAP Attributes Mapping. See Source System.



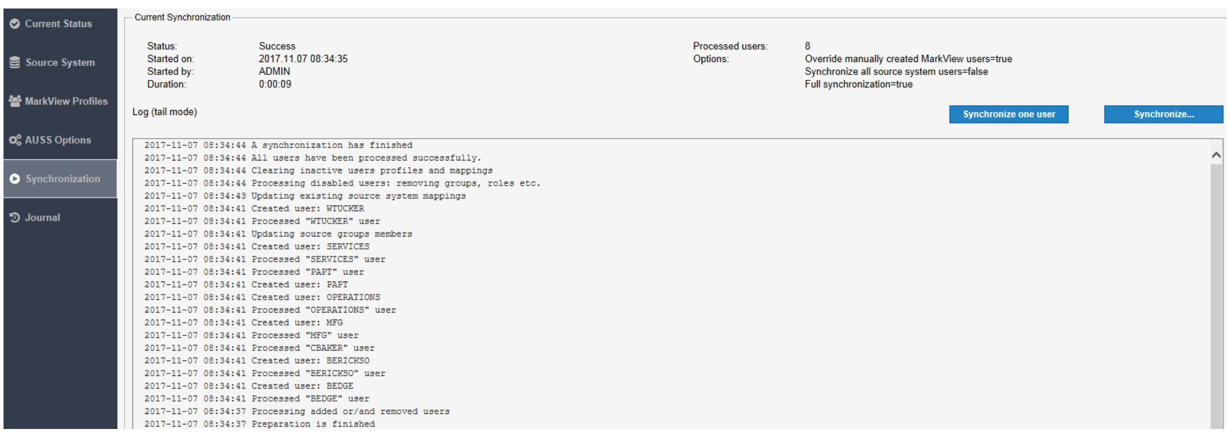
- **MarkView Profiles**: Lists available MarkView Profiles. See About MarkView profiles for a list of the default profiles. See MarkView Profiles for information about adding, editing, importing and exporting profiles.



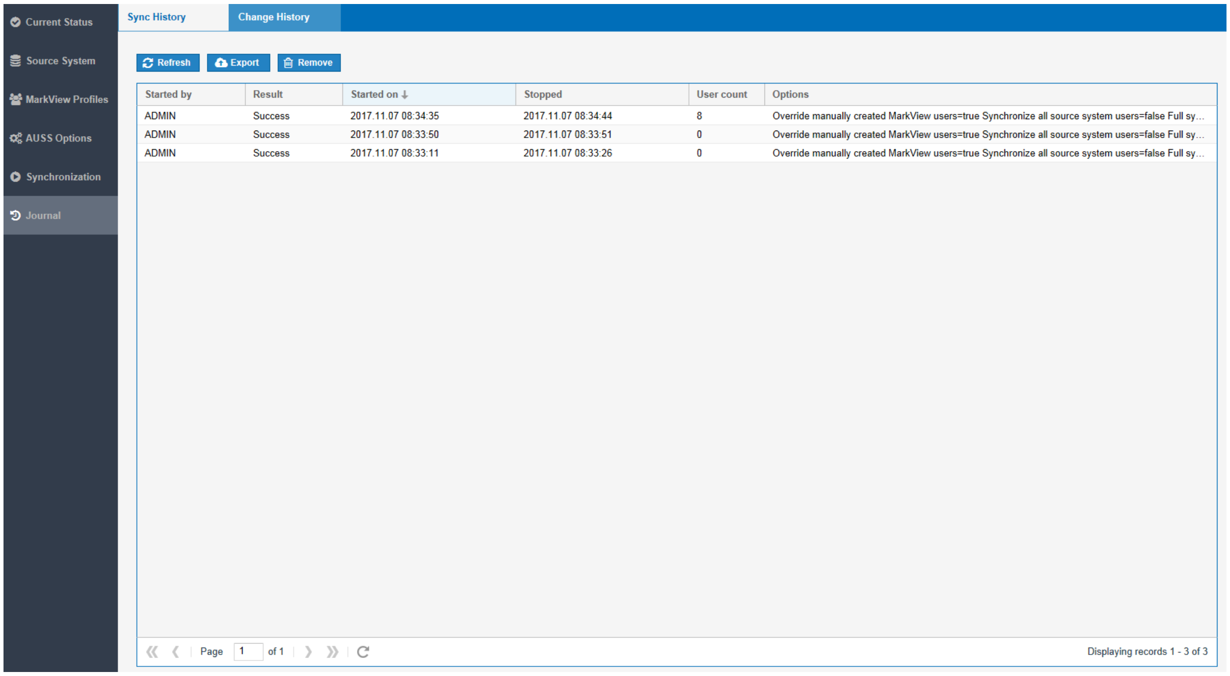
- **AUSS Options**: Opens the window in which you can set up synchronization schedules, set passwords, create backup files, configure notifications, and set up queues. See AUSS Options.



- **Synchronization**: Enables manual synchronization of user information between AUSS and the Source System. See [Synchronization].



- **Journal**: Displays the synchronization process history and changes. See [Journal] for information about the Journal tab.



Configure AUSS

Run the MarkView AUSS Setup Wizard and perform the following tasks to configure AUSS:

1. Configure the source system as described in Source System.
2. Set up the user options. Navigate to **AUSS Options** > **Initial User Options** and follow the instructions in Initial User Options.
3. Configure MarkView Profiles as described in MarkView Profiles.
4. Set up the synchronization schedule. Navigate to **AUSS Options** > **Sync Schedule and Options** and follow the instructions in Synchronization schedule and options.
5. If you want to run the first synchronization manually, see Synchronize for the first time.

Source System

Select the source system that you use to supply user data and follow the required configuration procedure:

- Microsoft Active Directory Service source system
- Oracle E-Business Suite source system

Microsoft Active Directory Service source system

If you use the Active Directory source system, see Active Directory source system connection information for the source system connection details.

1. Log in to MarkView and navigate to **Administration** > **AUSS Mapping Administration**.

2. On the **Source System** tab, open **Active Directory Connection**, enter or verify the LDAP connection information, and click **Test connection**.
   - If you see an error message, confirm the field settings.
   - If the test is successful, click **Save changes**.
3. Open **LDAP Search Filters**, configure the LDAP search filters using the context sensitive help, and click **Check filter**.
   - If you see an error message, confirm the field settings.
   - If the test is successful, the search results are displayed.
   - Click **Save changes**.
4. Open **LDAP Attribute Mapping**, type a user personal information and a source group, and click **Check mapping**.
   - If you see an error message, confirm the field settings.
   - If the test is successful, click **Save changes**.
5. Use **Source System Groups** to limit the scope of AUSS users by selecting specific groups from the user's Source Systems.
   AUSS allows mapping of the selected groups in Source System with MarkView Profile.

Oracle E-Business Suite source system

If you use the Oracle E-Business Suite source system, add Source System Groups.

1. Log in to MarkView and navigate to **Administration** > **AUSS Mapping Administration**.
2. On the **Source System Groups** tab, click **Add** Source Groups.
3. In the **Application** drop-down list, select an application. Available Source Groups are listed.
4. To find a specific source group on the list, in the **Filter** field, start typing the name.
5. Select Source System Groups that contain MarkView users and click **Add selected**.
6. Optionally you can remove a previously added Source System Group. In the list, select the Source System Group and click **Remove**.
7. To apply the changes, click **Save changes**.

Initial User Options

Use the **Initial User Options** tab to configure the default setup for all synchronized users.

1. Log in to MarkView and navigate to **Administration** > **AUSS Mapping Administration**.
2. On the **AUSS Options** tab, click **Initial User Options**.
3. Change the default **Initial user password**, if required.
4. Select **Print queue** and **Export queue** assigned for work item processing.
5. Click **Save changes**.

MarkView Profiles

The MarkView Profiles screen displays MarkView profiles with configured MarkView Groups and Roles.

Use the MarkView Profiles tab to review a brief description of the selected MarkView Profile with the list and the count of associated MarkView Groups, MarkView Roles, and Source System Groups.

You can add, delete, or edit profiles. Select a profile to add Source System Groups, MarkView Groups, and MarkView Roles and to map multiple groups from User Source Systems to MarkView Groups and MarkView Roles.

Create or edit a profile

Edit the existing profiles or create new profiles and map MarkView Groups, Roles, and Source Groups before you import users.

1. Log in to MarkView and navigate to **Administration** > **AUSS Mapping Administration**.
2. On the **MarkView Profiles** tab:
   - To add a profile, click **New**.
   - To edit a profile, select the profile and click **Edit** or double-click the profile.
3. To create a new profile, enter the **Profile Name** and **Profile Description** and add at least one MarkView group or role.
4. Select MarkView Groups:
   a. On the **MarkView Groups** tab, click **Add**.
   The Select MarkView Groups window opens.
   b. To find a specific group on the list, in the **Filter** field, start typing the name.
   c. Click **Add selected**.
5. (Optional) Select **Auto-populate** MarkView Roles based on MarkView Groups.
   When you select **Auto-populate**, MarkView Roles with the same names as the MarkView User Groups are automatically made part of this profile. However, each role name must be unique within MarkView.
6. If you did not select **Auto-populate**, select MarkView Roles now:
   a. On the **MarkView Roles** tab, click **Add**.
   The Select MarkView Roles window opens.
   b. To find a specific role on the list, in the **Filter** field, start typing the name.
   c. Click **Add selected**.
7. Click **Save changes** to save the new profile.
8. Select Source Groups:
   a. On the **Source System Groups** tab, click **Add**.
   The Select Source Groups window opens.
   b. To find a specific source group on the list, in the **Filter** field, start typing the name.
   c. Click **Add selected**.
   d. Click **Save changes** to edit the profile.
   e. To verify that the source system group is mapped to the profile, navigate to **Source System** > **Source System Groups**.

MarkView profile export and import

The AUSS Import/Export feature enables bulk updates to profile mappings. An Administrator can:

- Export selected profiles to a comma separated value file (CSV)
- Edit the CSV file.
- Import the updated CSV file into AUSS.

AUSS then processes the imported CSV file and updates the profiles.

CSV file format

The CSV file format is identical for both export and import purposes. The first line of the CSV file must be the field names in the order specified later. All fields in the CSV file are required for both importing and exporting. All field names and values, except for MarkView Group names, are case insensitive.

The following table lists the CSV file fields and their content.

Order	.csv Field Name	Field Content
1	AUSS Profile	Profile name (1–100 single-byte characters)
2	Description	Profile description (0–1000 single-byte characters)
3	Source Group	Source group name (1–100 single-byte characters)
4	Source Application	Source application name
5	Source System	Source system type (Oracle or Active Directory)
6	MarkView Group	A MarkView group name (1–200 single-byte characters)
7	MarkView Role	A MarkView role name (1–200 single-byte characters)
8	User Controllable	User controllable flag for MarkView Role (Y or N)

If a profile has multiple associated source groups or MarkView groups and roles, you can add additional rows in the CSV file to represent the one-to-many relationship of the MarkView profile to its source groups or MarkView groups and roles.

Tips for CSV files:

- Before you import or export, check your file path to ensure that you have read/write/modify access.
- Imported profiles are identified by the name.
  - If the profile name does not exist, AUSS adds the new profile name.
  - If the profile name exists, AUSS overwrites the profile information with the imported values from the CSV file including the mapping for that profile. The values in the CSV file replace the values for that profile in the database.
  - If a profile name is not in the imported CSV file, AUSS does not make any changes to that profile. Importing a CSV file does not delete any profiles.

Export profile CSV files from AUSS

You should be a user in the AUSS Mapping Administrator user group to perform this task.

1. Log in to MarkView and navigate to **Administration** > **AUSS Mapping Administration**.
2. On the **MarkView Profiles** tab, select the MarkView Profiles to export and click **Export**.

   If you do not select specific profiles, AUSS exports all profile data.

3. Follow the prompts to download the CSV file. Validate the path and file name to ensure that you have access to the exported file.

Edit a CSV file

1. Make a backup copy of the exported CSV file. If editing errors exist, you can reimport this backup file to revert to the pre-edited profile settings.
2. Open the exported CSV file in Microsoft Excel or a text editor.
3. Edit the profile lines.
4. Save the file as a CSV file. If you save the file in another format, you cannot import the data back into AUSS.

Import profile CSV files to AUSS

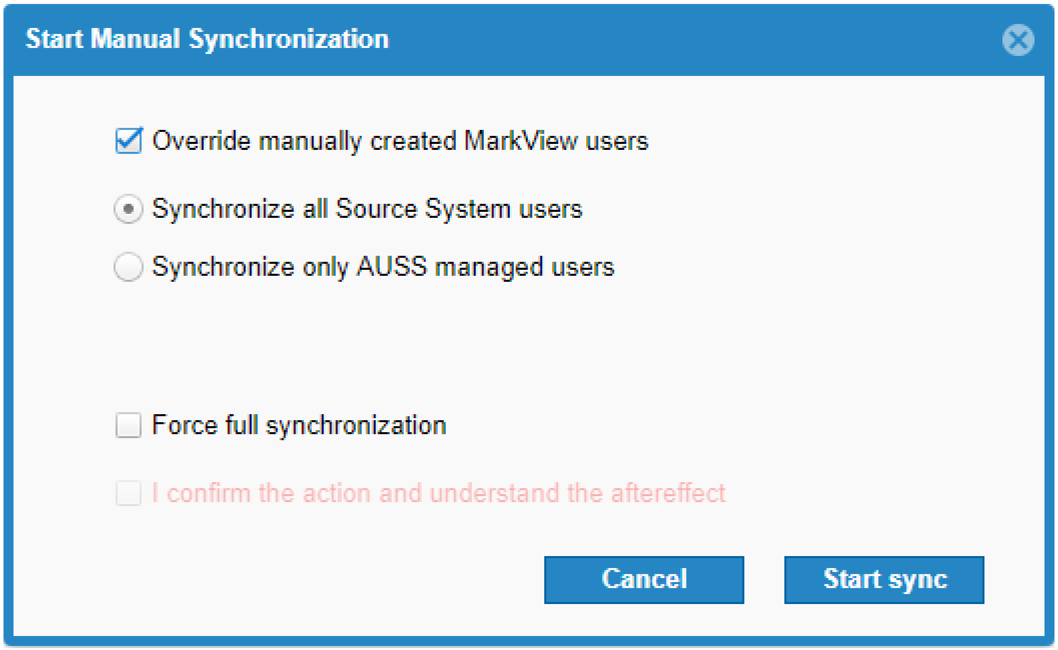
1. Log in to MarkView and navigate to **Administration** > **AUSS Mapping Administration** > **MarkView Profiles**.
2. Export your profile data to a backup CSV file. Validate the path and file name to ensure that you can recover your backup data.
3. Click **Import** and select the CSV file to import.
4. Correct any errors reported. See Troubleshoot AUSS.
5. If no errors exist, the changes made to the CSV file appear in the MarkView Profiles.

Synchronize for the first time

To complete the initial AUSS setup, run the synchronization for the first time. Either follow manual steps in this section, or configure AUSS automatic synchronization schedule as described in Synchronization schedule and options.

1. Log in to MarkView and navigate to **Administration** > **AUSS Mapping Administration**.
2. Ensure that your Source System Group to MarkView Profile mappings are correct and complete.
3. On the **Synchronization** tab, click **Synchronize** to synchronize users.

   The Start Manual Synchronization window opens.



4. In the Start Manual Synchronization window, select **Override manually created MarkView users** if you want to update manually created MarkView users during AUSS synchronization.

   This option determines whether to update manually created users or not. If the option is selected and there is a Source System user with the same user name as a manually created user, the MarkView user receives assignments in accordance with AUSS mappings and loses all the previous assignments that do not match AUSS mappings. Such overridden user becomes managed by AUSS in subsequent synchronizations. If the option is not enabled, AUSS does not update such users. Subsequent incremental synchronizations can also override manually created MarkView users with the option enabled, but only for the users which AUSS detects as updated since the previous synchronization.

   If you will need to override manually created MarkView users at a different time later, you will be able to do it by running manual synchronization with both **Override manually created MarkView users** and **Force full synchronization** options enabled.

5. Select a synchronization method:
   - **Synchronize all Source System users**: For the first-time synchronization, adds all Source System users to MarkView even if they do not belong to any Source System Group configured in AUSS.
   - **Synchronize only AUSS managed users**: For the first-time synchronization, adds only the Source System users that belong to at least one Source System Group configured in AUSS.
6. For the initial synchronization, do not select **Force full synchronization**.
7. Click **Start sync** to start synchronization.

About using AUSS

With Kofax MarkView AUSS, you can map your Source System Group users to corresponding MarkView Groups and Roles through MarkView Profiles.

In addition to the AUSS settings specified in Configure AUSS, use the following AUSS options:

- View the information about the current AUSS state and analyze synchronization data in near real time.
- Create a backup file with the current AUSS configuration data.
- Reset AUSS configuration and revert to initial setup.
- Enable email notifications about successful or unsuccessful synchronization.
- Configure the synchronization schedule and options.
- Review the synchronization history and track changes.

Current Status

The Current Status screen displays the overview information about the current AUSS state. Select the Current Status tab to review and analyze the following near real-time data. The data updates every 10 seconds.

- **Synchronization Status**: Displays current synchronization progress including the AUSS state in general (success, failure, or unknown after the first upgrade), the date and time of last successful and unsuccessful synchronization with the synchronized users count and the duration of the process.

  If required, download log files to view the synchronization details.
- **Current Synchronization**: Displays the information about current synchronization status including the percentage value of the process completeness, the start time and duration, synchronization options, and the synchronized users count. If sync is started, a user may see the process by clicking the link View process log.

  During the synchronization process, you may view the process log.
- **System Statistics**: Displays general information about synchronization statistics including MarkView profiles count and source system groups count. Click the corresponding links to review the full list of profiles and groups. System Statistics provides the maximum memory data and the schedule details. Click **Edit schedule** to configure the synchronization schedule.

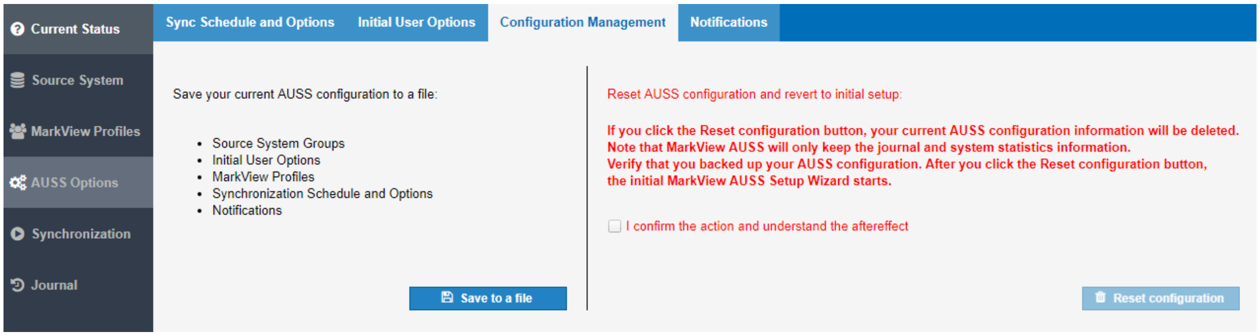
  The System Statistics information remains if you clear the configuration.

AUSS Options

Use the following additional options to set up AUSS:

- Set the initial password that users need when logging in to MarkView for the first time on the **Initial User Options** tab.
- Define print and export queues to use for AUSS.
- Enable automatic synchronization. See Synchronization schedule and options.
- Back up your current AUSS configuration or reset the configuration information.
- Configure email notifications about successful or failed jobs.

Configuration Management



In **Configuration Management**, you can create a backup file with your AUSS configuration data. Use this file if you Run the MarkView AUSS Setup Wizard.

The backup file includes the information about a source system, MarkView profiles, a synchronization schedule and options, notifications, and initial user options.

Use **Configuration Management** to delete the AUSS configuration. MarkView AUSS will only keep the Journal and System Statistics information. Before you click **Reset configuration**, verify that you backed up your current AUSS configuration.

Once you click **Reset configuration**, your Source System Groups, Initial User Options, MarkView Profiles, Synchronization Schedule and Options, and Notifications will be deleted.

After you reset the configuration, MarkView AUSS Setup Wizard starts. For details, see Run the MarkView AUSS Setup Wizard.

Notifications

Use the AUSS Notifications tab to configure email notifications that indicate if the synchronization process is a success or a failure.

To send email notifications, select **Enable the Successful Job notification** and **Enable the Failed Job notification**. Customize the email address from which notifications are sent, email recipients, email subject and content.

The **From** field is filled in automatically according to the MVFC_OUTBOUND_SMTP_USER preference value.

Do not use spaces in the **To** field for email recipients.

If you enable the Failed Job notification, you can also select the option to attach a log file that does not exceed 10 MB to the notification. After you verify the settings, save changes.

After you fill in all required fields, you may type a test email address in the **To** field and click **Verify** to receive the example of notification immediately.

Synchronization

AUSS synchronization adds new users to MarkView from the source system and updates groups and roles to which users are assigned.

The initial AUSS synchronization moves the group and user data from the source system to MarkView. AUSS assigns users to the appropriate MarkView Groups and Roles, based on MarkView Profile mappings. After running the initial synchronization, you can configure an automatic synchronization schedule to keep Source System user changes synchronized with MarkView user data and assignments. To enable automatic synchronization, see Synchronization schedule and options.

AUSS performs synchronization in one direction only: from the source system to MarkView. Do not maintain users in MarkView that you manage with AUSS. Manual changes in MarkView might be overwritten the next time you synchronize users.

> If a user record is deleted in your source system, AUSS disables the MarkView user record. AUSS does not delete MarkView user records.

If the synchronization is running, the Synchronization window displays manual synchronization status, including the time when the process was started, the user who started it, the synchronization duration, options, and processed users count. The window also displays the last lines of a log file as they appear in a real-time mode. The **Synchronize one user** and **Synchronize** buttons are disabled during the synchronization. If the synchronization is not running, you may start the synchronization for a selected user or for all users with the required options.

The synchronization process varies depending on your situation:

- For the first synchronization after a new MarkView installation, see Synchronize for the first time on page 40.
- For the first synchronization after an upgrade, see Manually synchronize the source system and MarkView after initial synchronization on page 45.
- To set up periodic synchronization, see Synchronization schedule and options.

Synchronization schedule and options

Use Sync Schedule and Options to enable automatic synchronization.

1. Log in to MarkView and navigate to **Administration** > **AUSS Mapping Administration**.
2. On the **AUSS Options** tab, click **Sync Schedule and Options**.
3. Select the required synchronization options from the list.
    a. Select or clear **Override manually created MarkView users**.

Scheduled synchronization searches for changes in the source system since the previous synchronization. Only users updated since the previous synchronization or users that belong to updated Source System Groups are processed during incremental synchronization and thus affected by the **Override manually created MarkView users** option. To process all Source System users and override manually created MarkView users, run manual synchronization with both the **Override manually created MarkView users** and **Force full synchronization** options enabled.

b. Select a synchronization method:
   - **Synchronize all source system users**: Adds/modifies all Source System users that were added/updated since the previous synchronization or belong to updated Source System Groups.
   - **Synchronize only AUSS managed users**: Adds/modifies Source System users that belong to updated Source System Groups. Modifies only those updated users who already exist in MarkView. For example, if there is a new Source System user added since the previous synchronization and this user does not belong to any Source System Group managed by AUSS, then this user is not added in MarkView in this case.

4. In the synchronization schedule, select one of the following options and configure the synchronization time if required:
   - **One-Time**: In the drop-down list, select the HH:MM value that increments by 30 minutes.

     The synchronization starts in HH:MM.
   - **Daily**: In the drop-down list, select the HH:MM value that increments by 30 minutes.

     The synchronization starts every day at HH:MM.
   - **Periodically**: In the **Time interval (hours)** field, specify the time period over which the synchronization repeats.

     Select the **Starting point** field if you want to set the time of the day when the synchronization starts. The synchronization starts when the next time interval is reached.
   - **Disable**: Select to disable automatic synchronization schedule.
5. Click **Save changes** to apply the synchronization settings.

Manually synchronize the source system and MarkView after initial synchronization

To synchronize MarkView users with AUSS:

1. Log in to MarkView and navigate to **Administration** > **AUSS Mapping Administration**.
2. Ensure that your Source System Group to MarkView Profile mappings are correct and complete.
3. If you want to synchronize all users manually, navigate to **Synchronization** and click **Synchronize**.
   a. Determine whether or not to overwrite your manually created MarkView user information with user information from Active Directory or Oracle. If you select **Override manually created MarkView users**, this option replaces the MarkView user information with the Source System user information provided that the following conditions are met:
      - A user exists in both MarkView and Active Directory or Oracle

- A user is enabled and active in the source system

To overwrite your MarkView user information, select **Override manually created MarkView users**. The synchronization replaces the MarkView user information with the Source System user information for any user who appears in both places. Unless you select the **Force full synchronization** option, AUSS will process only users added/updated since the previous synchronization or users that belong to updated Source System Groups. The **Override manually created MarkView users** option affects only the users to be processed in the current synchronization session.

To keep your existing MarkView user information, clear **Override manually created MarkView users**. The synchronization keeps the MarkView user information for any user who appears in both places.

b. Select a synchronization method:

- **Synchronize all Source System users**: Updates all users that have a valid record in the ERP system. For incremental synchronization, adds/modifies all Source System users that were added/updated since the previous synchronization or belong to updated Source System Groups. For full synchronization, adds/modifies all Source System users even if they do not belong to any Source System Group configured in AUSS.

  Full synchronization is performed initially. All subsequent synchronizations are incremental, unless you select the **Force full synchronization** option.

- **Synchronize only AUSS managed users**: Updates only such Source System users that have at least one assignment to a Source System Group. For incremental synchronization, adds/modifies Source System users that belong to updated Source System Groups. Modifies only the updated users who already exist in MarkView. For full synchronization, adds/modifies only the Source System users that belong to at least one Source System Group configured in AUSS.

c. Select **Force full synchronization** if required.

- If the **Force full synchronization** option is disabled, the synchronization will only capture changes since the previous synchronization. If any user information is missing and is not re-captured the next time you synchronize, use **Force full synchronization** to synchronize all the differences between the source system and MarkView according to the current AUSS settings. During the full synchronization AUSS also disables all the users who are currently inactive in the source system and removes manual assignments to groups and roles for other users.
- If you use Oracle EBS as a source system, with Role Based Access Control (RBAC) configured, incremental synchronization will not track Role Hierarchy changes correctly because Oracle EBS does not track such changes. For example, if a user has Role A and Responsibility B is connected to this role, the user will indirectly have Responsibility B and the respective record in the database. However, if Responsibility B is deleted from Role A in Role Hierarchy, the respective record for the user will not be end-dated but completely removed in Oracle EBS, so incremental synchronization will not be able to track such a change. In this case, use the **Force full synchronization** option to synchronize all the differences including indirect responsibilities deleted as a result of Role Hierarchy changes.

4. To manually synchronize a specified user, click **Synchronize one user**. If you choose this type of synchronization, the selected user will be removed from any groups and roles manually assigned in MarkView. To remove manual assignments for a MarkView-created user (a manually created user with a valid record in the ERP system), also select the **Override manually created MarkView users** option (see Step **b** below).
   a. In the **Start User Manual Synchronization** window, start typing the name of the user you want to synchronize and select the user in the drop-down list.

      You can only synchronize one user at a time.
   b. Determine whether or not to overwrite your manually created MarkView user information with user information from Active Directory or Oracle. If you select **Override manually created MarkView users**, this option replaces the MarkView user information with the Source System user information provided that the following conditions are met:
      - A user exists in both MarkView and Active Directory or Oracle
      - A user is enabled and active in the source system

      To overwrite your MarkView user information, select **Override manually created MarkView users**. The synchronization replaces the MarkView user information with the Source System user information for any user who appears in both places.

      To keep your existing MarkView user information, clear **Override manually created MarkView users**. The synchronization keeps the MarkView user information for any user who appears in both places.
5. Click **Start sync** to start synchronization.

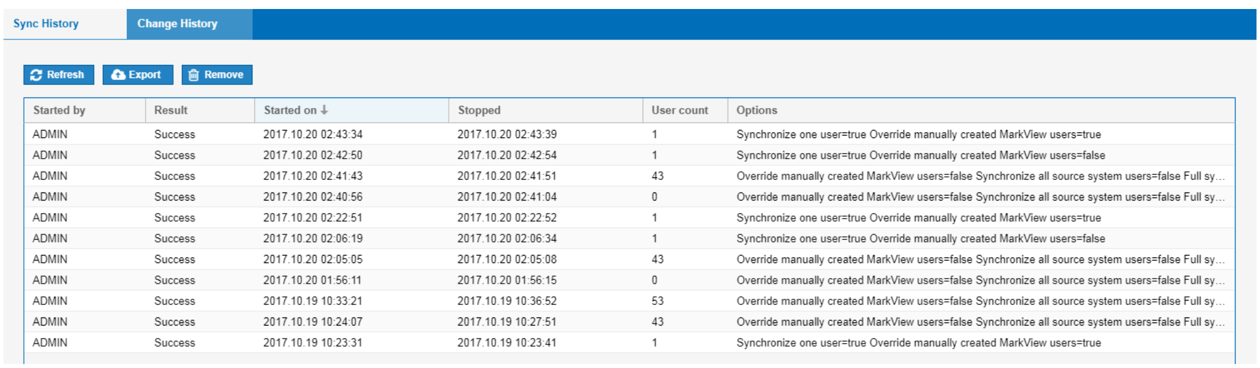
Trigger email notification of synchronization errors

To trigger automatic email notification if synchronization fails, set the following preferences from **Administration** > **MarkView Admin** > **Preferences**:

- MVERP_MAINTENANCE_EMAIL_ADDRESS: Specify the To or From email addresses for the administration email. If you leave this preference blank, MarkView does not send email notifications.
- MVFC_OUTBOUND_SMTP_SERVER: Specify the SMTP server to send email. If you leave this preference blank, MarkView does not send email notifications.
- MVFC_OUTBOUND_SMTP_PORT: Specify the SMTP port (default 25).
- MVFC_OUTBOUND_SMTP_CONNECTION_SECURITY: Specify if authentication is required.
- MVFC_OUTBOUND_SMTP_USER: Specify the SMTP user name if authentication is required.
- MVFC_OUTBOUND_SMTP_PASSWORD: Specify the SMTP password associated with the SMTP user name if authentication is required.

If the synchronization fails, the MarkView Administrator can also select the option to attach a log file that does not exceed 10 Mb to the notification.

Journal



The **Journal** tab displays the synchronization history and change tracking.

The **Sync History** table includes the following data:

- **Started by**: The user who started the synchronization.
- **Result**: The actual status of the synchronization. For example, **Success**.
- **Started on**: The date and time when the synchronization started.
- **Stopped**: The date and time when the synchronization ended.
- **User count**: The number of synchronized users.
- **Options**: The synchronization method and the **Override manually created MarkView users** option selection.

Use additional **Sync History** options to refresh the page, to export the information to a XLS file, or to remove records.

The **Change History** table displays:

- **Action**: Added, Changed, or Deleted
- **Area**: The area where the change took place.
- **Element**: The item that was changed. This field can include MarkView Groups and MarkView Roles, fill-in fields in AUSS Options.
- **Old value**: If the item was added, the column is blank.
- **New value**: If the item was deleted, the column is blank.
- **User name**: The user who performed the action.
- **Date**: The date and time when the action was performed.

It may help to troubleshoot some issues. The administrator user can export the information to a XLS file.

Troubleshoot AUSS

To recover from a catastrophic error, you can replace your AUSS data with a historic exported CSV profile file. See MarkView profile export and import on page 39. After that, select the **Force full synchronization** option when running the synchronization.

> This does not replace regularly backing up your system.

Export or import fails

If the import or export fails:

- Check the CSV file data for invalid values in source system type, application name, source group, MarkView group name or MarkView role name.
- Check the profile name. Since AUSS identifies imported profiles by name, if you change the profile name when you edit the CSV file, you risk unexpected results when you import the CSV file.
- Check the path and file name to ensure that you have read/write/modify access to the file.

Inconsistency between user rights and the Everyone profile groups and roles

If you have inconsistencies between user rights and the Everyone profile groups and roles, do the following:

1. After you upgrade MarkView, on the AUSS user interface, delete all groups and roles from the Everyone profile, save changes, and recreate roles and groups.
2. Resynchronize users.

Log file

In case of unexpected results, check the usermgmt.log file.

End-dated user authorization in MarkView

When integrated with Oracle Source System and if the WEBCLNT_SEC_AUTH_TYPE preference is set to MV, the end-dated user may still have access to MarkView before the synchronization. The end-dated user can be authorized in MarkView within 24 hours regardless of the synchronization schedule. If the synchronization occurs after 24 hours, the user access is disabled.

You can disable the end-dated user access immediately by setting the **Disable Date** value in **MarkView Admin** > **User Profiles**.

User not synchronized after scheduled synchronization

Two common causes:

- The user profile was created manually. Check the settings. Run the synchronisation using the **Override manually created MarkView users** option with the selected **Force full synchronization** option. See Synchronization.
- The user's source group is not in AUSS. For information about adding source system groups, see Source System.

Indirect responsibilities deleted as a result of Role Hierarchy changes (Oracle EBS only)

If you use Oracle EBS as a Source System and Role Based Access Control (RBAC) is configured in Oracle EBS, incremental synchronization will not track Role Hierarchy changes correctly because Oracle EBS does not track such changes. For example, if a user has Role A and Responsibility B is connected to this role, the user will indirectly have Responsibility B and the respective record in the database. However, if Responsibility B is deleted from Role A in Role Hierarchy, the respective record for the user will not be end-dated but completely removed in Oracle EBS, so incremental synchronization will not be able to track such a change. In this case, use Force full synchronization option, to synchronize all the differences including indirect responsibilities deleted as a result of Role Hierarchy changes.

Add MarkView users to user groups

All users must be assigned to groups that are authorized to open documents for an organization. Assign MarkView users to a user group associated with an organization by:

- Using AUSS to add users to org-related groups that MarkView creates by default, such as MVERP-ORGNAME.
- Updating existing groups to include Org Authorization, through MarkView Admin.

> Although you can manually assign MarkView users, running AUSS overwrites the manual assignments. For the best results, use AUSS.

Chapter 3

Maintain organizations

This chapter describes how to modify and maintain your organizations using optional setup tasks and features. You may not need to perform any of these tasks after completing the required setup tasks described in Set up organizations on page 51.

To minimize disruption to those who use the system, perform system administration and maintenance when the system is quiet.

MarkView lets you configure some settings at a global level or at an organizational level. Global settings apply to all organizations in the company. Organizational settings apply to only the organization. Organizational settings override global settings.

For example, you might enable the MarkView integration with Expense Management at a global level, but disable the integration for an organization that does not require receipt approval through MarkView.

For the best results, configure global settings first, which lets you establish default settings for all organizations. Then configure organization-specific settings to override global settings as needed.

Set up organizations

Organization is equivalent to Operating Unit or Business Unit in Oracle.

MarkView lets you control workflow processes by organization and document type. You can configure workflows differently for each organization or specify global settings that apply to all organizations. Organization-specific settings override global MarkView settings for the affected organizations.

When you add an organization, MarkView creates a MarkView User Group associated with the organization. You control what documents a MarkView user accesses by adding the user to the organization-related user group. MarkView users who are not part of the user group have no access to the documents for that organization.

MarkView also lets you enable or disable the MarkView integration with Expense Management by organization.

Prerequisites

Before adding organizations to MarkView, verify the following:

- MarkView for Accounts Payable is installed.

- If using Expense Management, MarkView for Expense Management is installed.
- Organizations exist in Oracle for the organizations being set up in MarkView.
- In Oracle:
  - Responsibilities are set up and configured to access organizations.
  - Users are assigned to these responsibilities.
- Oracle Forms are set up (part of MarkView post-installation).

Before adding and configuring organizations in MarkView, set up default GL accounts in Oracle. Configure a default GL account for an organization, which is used to create dummy lines on a Non-PO Invoice when it is created in Oracle. For more information, see the Kofax MarkView Installation or Upgrade Guides.

Required tasks

Setting up organizations in MarkView requires that you:

1. Add organizations defined in the ERP to MarkView (see Add an organization to MarkView on page 54).

   (Optional) If you use Sub Types, you can simplify configuration by adding the Sub Types immediately after adding the Organization (see Define Sub Types on page 63).

2. Using one of the following methods, assign MarkView users to the MarkView User Group for the organization:
   - For the best results, use Automatic User Setup and Synchronization (AUSS) to map ERP responsibilities to MarkView user groups. (See Set up MarkView users with AUSS on page 28.) AUSS allows synchronization between MarkView privileges and privilege sets from the ERP system or Active Directory.

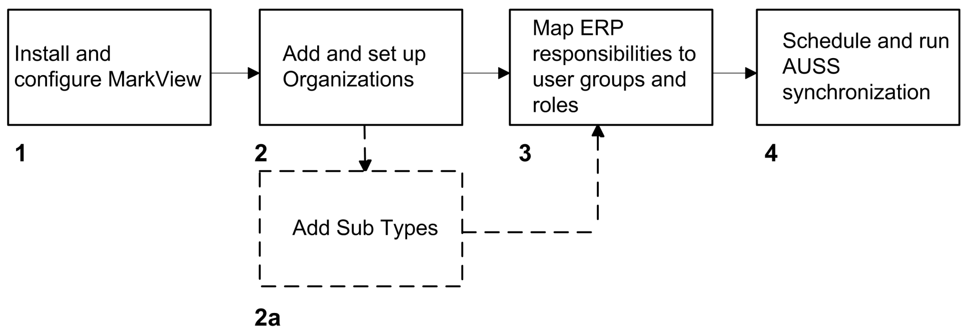
     MarkView creates a user group when you add the organization.
   - Manually assign users to the MarkView User Groups (see Assign users manually on page 141) and add users to the appropriate MarkView roles (see Add users to a role on page 142).

     If you create a group that you do not map to ERP responsibilities and you assign users to that group, running AUSS does not overwrite those assignments.

     If you do not use AUSS, also modify Form Block Functions to associate the ERP responsibilities with newly added organizations. (If you use AUSS, you do not need to modify Form Block Functions.) See Assign ERP responsibilities to MarkView organizations on page 69.

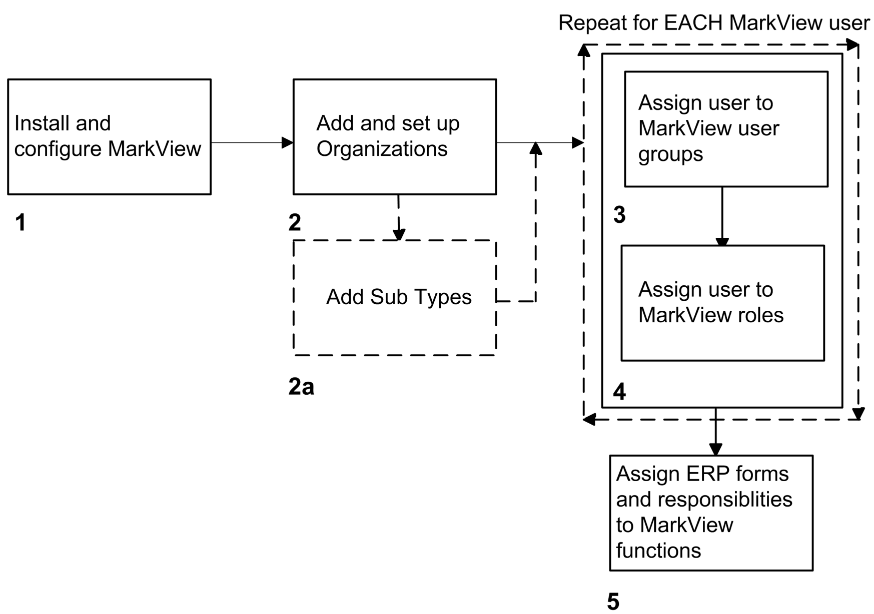
     Running AUSS synchronization may overwrite some manual assignments.

The following figures illustrate the sequence of steps needed to complete Organization Setup with and without using AUSS.



Organization Setup Using AUSS

1. Install and configure MarkView.
2. In MarkView, add and set up organizations.
   2a—If using Sub Types, add and set up Sub Types.
3. Using AUSS, map ERP responsibilities to MarkView User Groups and roles.
4. Schedule and run the AUSS synchronization to add users to MarkView.



Organization Setup without Using AUSS

1. Install and configure MarkView.
2. In MarkView, add and set up organizations.
   2a—If using Sub Types, add and set up Sub Types.
3. For each user who needs access to MarkView, assign users to MarkView User Groups.
4. For each user who needs access to MarkView, assign users to MarkView Roles.

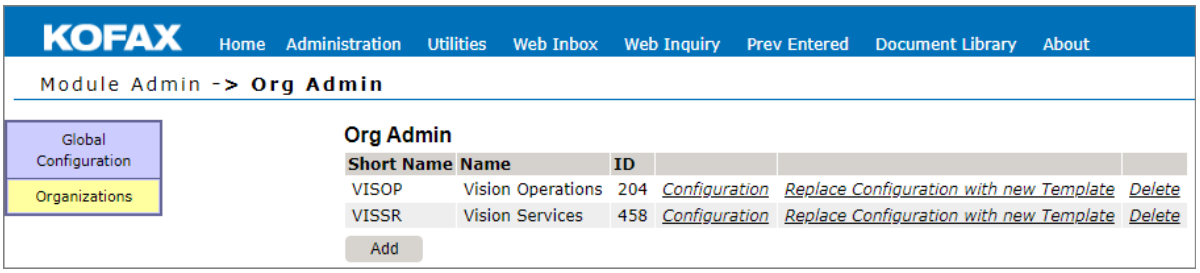
5. Through the Form Block Functions feature, assign ERP forms and responsibilities to MarkView functions.

Add an organization to MarkView

For the best results, configure global settings first, which lets you establish default settings for all organizations. Then, configure organization-specific settings to override global settings as needed.

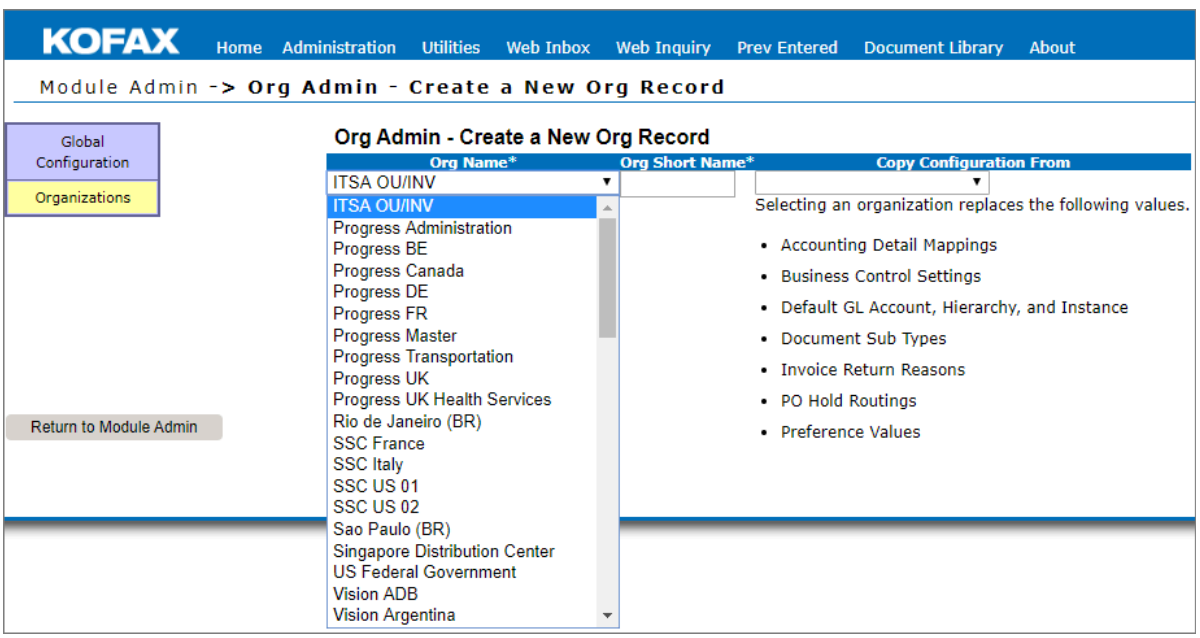
1. Log in to MarkView and navigate to **Administration** > **Module Admin**.
2. Select the **Organizations** tab.

   The Org Admin window opens.

3. Click **Add.**

   The **Org Admin - Create a New Org Record** form appears.

4. In the **Org Name** list, select the organization to add.

   You cannot add an organization that is not defined in Oracle.

5. Enter a new **Org Short Name** or accept the default **Org Short Name**, which MarkView populates with the name specified in Oracle. (If you use lowercase letters, MarkView converts them to uppercase.)

   MarkView uses the Org Short Name to more efficiently retrieve information. An **Organization Name** can have up to 260 characters with spaces and special characters, whereas the **Org Short Name** is limited to 8 alphanumeric characters with no spaces.
6. (Optional) To use the configuration of an existing organization as the configuration for the new organization, select an organization under **Copy Configuration From**.

   For example, if your shared service center has 15 organizations that will follow the same workflow processes and have the same Sub Types, you can fully define and configure one organization and copy that configuration to the other 14 when you add them to MarkView.
7. Click **Insert**.

Assign users

When you add an organization to MarkView, MarkView creates a new MarkView user group for the new organization. By convention, the name created is "MVERP - Org", where Org is the unique organization Short Name. For example, if you create an organization with the short name "VISOP", the user group name is MVERP - VISOP.

After adding an organization to MarkView, assign users to the related user group (through AUSS or manually) to make the organization available.

If you set up AUSS, the synchronization process automatically adds new users associated with responsibilities to MarkView organizations, User Groups, and Roles. If you add users to MarkView manually, the AUSS process may overwrite your updates.

After adding the organization to MarkView, run AUSS synchronization to add the MarkView users to the new organization user group. (For information about setting up and running AUSS, see Set up MarkView users with AUSS on page 28.)

Avoid using both AUSS and manual assignments.

If you do not use AUSS, assign users manually as described in Assign users manually on page 141.

Give all MarkView users access to an organization

To give all MarkView users across all organizations access to the new organization, add organization authorization to the All Users group. For example, your AP department may be small and you need everyone using MarkView to have access to all document types for an organization.

1. Log in to MarkView and navigate to **Administration** > **MarkView Admin**.
2. Select the **User Groups** tab.
3. Search for the group called **All Users** and click **Details** next to the group name.
4. Select the **User Group Org Auth** tab.
5. Click **Add.**
6. Enter the MVERP - OrgShortName to which all users should have access.
7. Click **Save.**

Optional setup tasks

After setting up your system initially, you might need to modify the Organization Setup for your MarkView solution. For information about optional setup tasks, see Maintain organizations on page 51.

Optional organization setup tasks

The setup tasks presented in the following sections are in the order that you are most likely to use. However, you can perform only those tasks that you need and you can perform them in any order you choose.

Information about how to perform a task appears on the page referenced. Some tasks apply only to sites that do not run AUSS.

MarkView applies global settings to all organizations in MarkView. However, settings that you make at the organizational level override global settings for an organization.

1. Configure workflow settings by answering a series of questions that change underlying MarkView preference values (see Configure the workflow on page 57). Set globally or by organization.
2. Add Sub Types (see Define Sub Types on page 63). Set globally or by organization.
3. Configure global settings for all organizations (see Configure Global AP Settings on page 66).
4. Configure MarkView Roles (see Set Role Configuration for all organizations on page 67).
5. For Oracle MarkView solutions where you do not use the AUSS feature, configure form responsibilities and Form Block Functions for the organization and ERP group (see Assign ERP responsibilities to MarkView organizations on page 69). Set globally or by organization.
6. For Kofax Transformation Modules, set the default GL Account for Invoice Transformation, Hierarchy, and Instance (see Set workflow preferences on page 57). Set globally or by organization.
7. Set up Accounting Details Global and Reference Mapping (see Map Accounting Details on page 70).
8. Set business controls (see Set Business Controls on page 72).
9. Configure invoice return reasons (see Configure Invoice Return Reasons on page 73). Set globally or by organization.
10. Define PO holds and routing (see Add PO Holds on page 74 and Establish routing based on PO Holds on page 76).

    You can authorize MarkView User Groups by organization. Because the process centers on user groups, the information appears in Assign permissions to user groups on page 145.

Configure the workflow

MarkView controls workflows through a series of preference settings. By answering questions in Organization Setup, you specify whether invoices, receipts, or supplier documents are subject to reviews, verification, audits and more during processing. Your answers give MarkView direction about handling MarkView documents.

Information about answering the questions that set workflow preferences appear in Set workflow preferences on page 57. A complete list of the questions that you answer appears in Organization setup questions and affected MarkView preference names on page 59. See the *Kofax MarkView Features Guide* for descriptions of workflows, invoices processing, and configuration options.

Determine the impact of your answers on the workflow

- **Reviews**: Review questions let you control when an invoice undergoes additional reviews. For example, your company might want all invoices over a certain amount, like $10000, to undergo additional review. Enabling reviews transitions an invoice to the appropriate review queue. Review types include the following:
  - Tax Review
  - Freight Review
  - Additional Review
  - QA Review
- **Receipt Verification**: 2-way matching questions let you specify that an employee verify 2-way match PO invoices to confirm that your company received the goods or services for which the company was charged.

  Work items transition to the Verification Process for PO Invoices queue where the employee can take action.
- **Approval Hierarchy**: Approval hierarchy questions for Non-PO workflows let you control how MarkView evaluates approval limits for an employee, the approval hierarchy to use, and the controls available.
- **Approve Action Validation**: Approval questions let you specify when to allow the Approve action relative to distributions:
  - At any time.
  - Only if the invoice is fully distributed.
- **Approval and Coding Queue or Approval Queue**: Approval questions let you direct a Non-PO work item to transition to the Approval and Coding queue by default when a MarkView user takes a Non-PO Entry Complete action on the work item.
- **Return to Supplier Actions**: AP processor questions let you control when and how MarkView users can return invoices to suppliers to resolve issues or answer questions.
- **Splitting Documents**: AP processor questions let you determine if AP processors are allowed to split documents into separate documents or if this function is limited to capture review users.

Set workflow preferences

1. Log in to MarkView and navigate to **Administration** > **Module Admin**.

2. To configure the workflow:
   - For all Organizations, click **Global Configurations**.
   - For an individual Organization, locate the organization for which to add control and click **Configuration**.

   The **Organization Setup Preferences** page opens showing the current settings. If you do not change a setting, MarkView uses the global setting.

   For example, if the percentage of invoices subject to QA Review is 0, no invoices go for QA Review. If you change the setting to 5, five percent of the invoices go for QA Review.

Global Preferences

These are system level values. They may be overridden for each Organization.

Description	Global Value
AP Invoice Creation: Should connector pass invoice freight data from KTM to the ERP?	Yes
AP Invoice Creation: Should connector pass invoice tax data from KTM to the ERP?	Yes
AP Invoice Creation: Should invoices be routed to entry when distributions are not created? (Oracle R12 only)	No
AP Invoice Creation: To which GL account should connector assign captured Non-PO Invoice distributions?	
AP Invoice Creation: To which GL account should connector assign captured Pre-Approved Invoice distributions?	
AP Invoice Creation: To which GL account should connector assign captured freight distributions?	
AP Invoice Creation: To which GL account should connector assign captured tax distributions?	
Comment Request: Should notification emails be sent for items which are recalled, re-routed, or timeout?	No

3. Click **Update** to change the answers and thereby change the workflow.

   If you update the settings for an organization, MarkView displays the global values next to the fields where you make your selections.

   The following example shows fields for setting values for the Vision Operations (ID 204) organization. The fields under the **204 Value** column set values for the organization. The global value appears in the **Global Value** column.

Update 204 Preferences

A blank value will cause this Organization to use the Global value for that preference.

Description	204 Value	Global Value
AP Invoice Creation: Should connector pass invoice freight data from KTM to the ERP?		Yes
AP Invoice Creation: Should connector pass invoice tax data from KTM to the ERP?		Yes
AP Invoice Creation: Should invoices be routed to entry when distributions are not created? (Oracle R12 only)		No
AP Invoice Creation: To which GL account should connector assign captured Non-PO Invoice distributions?		

Answering these questions implements the MarkView behavior that you specify by changing MarkView preference values.

Detailed preference descriptions appear on the pages specified in the table, Organization setup questions and affected MarkView preference names on page 59.

4. Click **Update** to save your changes.

Organization setup questions and affected MarkView preference names

When you answer the questions that configure organizations, your answers set values for MarkView preferences. You can also change preference values through MarkView administration pages. To access preferences through the administration pages, you use the preference name.

Question	MarkView Preference Name
AP Invoice Creation: Should connector pass invoice freight data from Kofax Transformation Modules to the ERP?	MVAP_ENABLE_CONNECTOR_FREIGHT
AP Invoice Creation: Should connector pass invoice tax data from Kofax Transformation Modules to the ERP?	MVAP_ENABLE_CONNECTOR_TAX
AP Invoice Creation: Should invoices be routed to entry when distributions are not created? (Oracle R12 only)	MVAP_ENTRY_ROUTE_WHEN_NO_DIST
AP Invoice Creation: To which GL account should connector assign captured Non-PO Invoice distributions?	MVAP_ITEM_DEFAULT_ACCOUNT
AP Invoice Creation: To which GL account should connector assign captured Pre-Approved Invoice distributions?	MVAP_PREAPP_DEFAULT_ACCOUNT
AP Invoice Creation: To which GL account should connector assign captured freight distributions?	MVAP_FREIGHT_DEFAULT_ACCOUNT
AP Invoice Creation: To which GL account should connector assign captured tax distributions?	MVAP_TAX_DEFAULT_ACCOUNT
Comment Request: Should notification emails be sent for items which are recalled or re-routed?	MV_COMMENT_NOTIFY_EMAIL_ENABLED
Expenses: Is MarkView Expense enabled?	MVEXP_ENABLED
Invoice Retrieval: Require the AP processor who entered the invoice to handle additional AP tasks?	MVAP_AUTO_RETRIEVE_FOR_OWNER
Invoice Review, Additional: Amount (in the base currency) which triggers Additional Review?	MVAP_DEFAULT_REVIEW_THRESHOLD
Invoice Review, Additional: Review should be conducted by a single user or a group?	MVAP_DEFAULT_REVIEW_BY
Invoice Review, Additional: Supply the name of the user who should conduct the review	MVAP_DEFAULT_REVIEW_USER

Question	MarkView Preference Name
Invoice Review, Freight: Freight percentage on an invoice over which Freight Review is triggered?	MVAP_FREIGHT_REVIEW_PCT_THRESHOLD
Invoice Review, Freight: Invoice freight amt (in the base currency) that should trigger Freight Review?	MVAP_FREIGHT_REVIEW_AMOUNT_THRESHOLD
Invoice Review, Freight: Percentage of invoices which should be sent for Freight Review?	MVAP_FREIGHT_REVIEW_SAMPLING_PERCENTAGE
Invoice Review, Freight: Review should be conducted by a single user or a group?	MVAP_FREIGHT_REVIEW_BY
Invoice Review, Freight: Supply the name of the user who should conduct the freight review.	MVAP_FREIGHT_REVIEW_USER_ID
Invoice Review, QA: Percentage of invoices which should be sent for QA Review?	MVAP_DEFAULT_QA_REVIEW_PERCENT
Invoice Review, QA: Review should be conducted by a single user or a user group?	MVAP_DEFAULT_QA_REVIEW_BY
Invoice Review, QA: Supply the name of the user who should conduct the review	MVAP_DEFAULT_QA_REVIEW_USER
Invoice Review, Senior Financial Audit: Can invoices be routed for a Senior Financial Audit review?	MVAP_ALLOW_SFA_REQUEST
Invoice Review, Tax: Invoice tax amount (in the base currency) over which Tax Review is triggered?	MVAP_TAX_REVIEW_AMOUNT_THRESHOLD
Invoice Review, Tax: Percentage of invoices which should be sent for Tax Review?	MVAP_TAX_REVIEW_SAMPLING_PERCENTAGE
Invoice Review, Tax: Review should be conducted by a single user or a group?	MVAP_TAX_REVIEW_BY
Invoice Review, Tax: Supply the name of the user who should conduct the Tax review	MVAP_TAX_REVIEW_USER_ID
Invoice Review, Tax: Tax percentage on an invoice over which Tax Review is triggered?	MVAP_TAX_REVIEW_PCT_THRESHOLD
Invoice Routing, Additional Review: What queue should Non-PO Invoices go to after Additional Rev?	MVAP_NON_PO_REVIEW_COMPLETE_QUEUE
Invoice Routing, Additional Review: What queue should PO Invoices go to after Additional Review?	MVAP_PO_REVIEW_COMPLETE_QUEUE
Invoice Routing, Additional Review: What queue should Pre-Approved Invoices go to after Additional Review?	MVAP_PRE_APP_REVIEW_COMPLETE_QUEUE
Invoice Routing, Approval: What queue should Non-PO Invoices go to after Approval?	MVAP_NON_PO_APPROVE_QUEUE
Invoice Routing, Entry Complete: What queue should Non-PO Invoices go to after Entry Complete?	MVAP_NON_PO_ENTRY_COMPLETE_QUEUE
Invoice Routing, Entry Complete: What queue should PO Invoices go to after Entry Complete?	MVAP_PO_ENTRY_COMPLETE_QUEUE

Question	MarkView Preference Name
Invoice Routing, Entry Complete: What queue should Pre-Approved Invoices go to after Entry Complete?	MVAP_PRE_APP_ENTRY_COMPLETE_QUEUE
Invoice Routing, Freight Review: What queue should Non-PO Invoices go to after Freight Review?	MVAP_NON_PO_FRT_REVIEW_COMPLETE_QUEUE
Invoice Routing, Freight Review: What queue should PO Invoices go to after Freight Review?	MVAP_PO_FRT_REVIEW_COMPLETE_QUEUE
Invoice Routing, Freight Review: What queue should Pre-Approved Invoices go to after Freight Review?	MVAP_PRE_APP_FRT_REVIEW_COMPLETE_QUEUE
Invoice Routing, QA Review: What queue should Non-PO Invoices go to after QA Review?	MVAP_NON_PO_QA_COMPLETE_QUEUE
Invoice Routing, QA Review: What queue should PO Invoices go to after QA Review?	MVAP_PO_QA_COMPLETE_QUEUE
Invoice Routing, QA Review: What queue should Pre-Approved Invoices go to after QA Review?	MVAP_PRE_APP_QA_COMPLETE_QUEUE
Invoice Routing, Recycle: Require review when AP processors recycle an image?	MVAP_REVIEW_RECYCLE
Invoice Routing, Supplier: Can AP processors return an entered invoice to a supplier?	MVAP_ALLOW_RETURN_ATTACHED
Invoice Routing, Supplier: Require review when AP processors return an invoice to the supplier?	MVAP_REVIEW_RETURN
Invoice Routing, Tax Review: What queue should Non-PO Invoices go to after Tax Review?	MVAP_NON_PO_TAX_REVIEW_COMPLETE_QUEUE
Invoice Routing, Tax Review: What queue should PO Invoices go to after Tax Review?	MVAP_PO_TAX_REVIEW_COMPLETE_QUEUE
Invoice Routing, Tax Review: What queue should Pre-Approved Invoices go to after Tax Review?	MVAP_PRE_APP_TAX_REVIEW_COMPLETE_QUEUE
Invoice Routing: Can AP processors route an unattached invoice for comment?	MVAP_ALLOW_UNATTACHED_COMMENT
Invoice Routing: Can AP processors split documents during entry?	MVAP_ALLOW_SPLIT_DURING_DATA_ENTRY
Non-PO Invoice, Approval Hierarchy: How should MarkView determine a user's spending limit? (Oracle only)	MVAP_HIERARCHY_RULE_LIMIT
Non-PO Invoice, Approval Hierarchy: How should MarkView handle credits (negative invoices)?	MVAP_ENFORCE_NEGATIVE_AMOUNT_ROUTING
Non-PO Invoice, Approval Hierarchy: What hierarchy control or document type should MarkView use? (Oracle only)	MVAP_HIERARCHY_CONTROL
Non-PO Invoice, Approval Hierarchy: What hierarchy name should MarkView use? (Oracle Positional only)	MVAP_POSITIONAL_NAME
Non-PO Invoice, Approval Hierarchy: What hierarchy type should be used to verify authority?	MVERP_HIERARCHY_TYPE

Question	MarkView Preference Name
Non-PO Invoice, Approval: Against what value does MarkView compare the approval limit?	MVAP_HIERARCHY_INVOICE_AMOUNT
Non-PO Invoice, Approval: Does an invoice need to be fully distributed in order to be approved?	MVAP_NON_PO_APPROVE_REQUIREMENT
Non-PO Invoice, Approval: What authority does the alternate user have when approving invoices?	MVERP_USE_ALTERNATE_AUTHORITY
Non-PO Invoice, Approval: Can approvers route work items for comment?	MVAP_ALLOW_COMMENT_ROUTING
PO Invoice, 2-Way Matching: Enable 2-Way Receipt Review in MarkView?	MVAP_PO_REQUIRE_RECEIPT_ON_2_WAY_MATCH
PO Invoice, 2-Way Matching: Which PO line requestor should review invoices marked as 2-Way match?	MVAP_PO_VERIFICATION_USER_DETERMINED_BY
PO Invoice, Routing: Can AP processors route PO Invoices to the Purchasing Group?	MVAP_ALLOW_ROUTE_TO_PURCHASING
Pre-Approved Invoice, Entry: Does an invoice need to fully distributed in order to complete entry	MVAP_CHECK_DISTRIB_PREAPP_INV_ENTRY
SSI, Follow-up Doc expiration: How many hours before SSI Invoice request expires in Non-PO workflow?	SSI_AUTO_EXPIRE_HOURS
SSI, Follow-up Doc expiration: What action should be taken when SSI invoice expires?	SSI_FOLLOWUP_EXPIRATION_ACTION
SSI, Follow-up Doc reminder: How many hours before first reminder email is sent?	SSI_FOLLOWUP_REMINDER_01
SSI, Follow-up Doc reminder: How many hours before second reminder email is sent?	SSI_FOLLOWUP_REMINDER_02
SSI, Follow-up Doc reminder: How many hours before third reminder email is sent?	SSI_FOLLOWUP_REMINDER_03
SSI, Follow-up Doc: Require follow-up be sent before SSI Invoice goes to approval?	SSI_REQUIRE_FOLLOWUP_FOR_APPROVAL
SSI, Follow-up Doc: What email address should be used when sending in follow-up documents?	SSI_EMAIL_ADDRESS
SSI, Follow-up Doc: Send email to requestor when follow-up has been attached to invoice?	SSI_ENABLE_FOLLOWUP_CONFIRMATION
SSI, Import: Send email to requestor when invoice import fails?	SSI_ALERT6_ON_IMPORT_FAILS
SSI, Supplier Maint: Can SSI requestors request creation of suppliers and supplier sites?	SSI_ALLOW_SUPPLIER_CREATE
SSI, Supplier Maint: Can SSI requestors request supplier site changes?	SSI_ALLOW_SUPPLIER_MODIFY
SSI, Supplier Maint: Send email to requestor when Supplier Maintenance has been completed?	SSI_ALERT_AFTER_SUPPLIER_MAINT

Question	MarkView Preference Name
SSI: Is the Auto Calculate Tax check box selected by default, or use Supplier Site setting?	SSI_AUTO_CALC_TAX_DEFAULT
SSI: What type of tax-related fields are displayed during entry?	SSI_TAX_ENTRY_MODE

Define Sub Types

Sub Types give you a finer level of control over which types of documents your MarkView users can view and with which they can interact.

For example, Company X needs different groups of AP processors to handle different types of Non-PO invoices within the US Organization. One group of processors will process Facilities invoices, another group will process Utilities invoices, and a third group will process all the general Non-PO invoices. The MarkView administrator creates three Sub Types—one for Facilities, one for Utilities, one for General—that apply to the US organization. The administrator then assigns the appropriate users to a Sub Type role for each. The unique combination of the Document Type (Non-PO invoices), the Organization (US), and the Sub Type name (either General, Facilities, or Utilities) lets you separate and control the Non-PO invoice processing.

Taking this example a step further, Company X authorizes employee 12345 to use the Process Monitor to view all Non-PO invoices in the US Organization. Company X then authorizes employee 67890 to view only outstanding Facilities Non-PO invoices within the US Organization.

Because employee 12345 is a member of an organization-specific role, employee 12345 can view all invoices belonging to the US Organization, including facilities invoices. Employee 67890 can view only Facilities Non-PO invoices.

You can create:

- Global Sub Types that are available to every organization in your company
- A Sub Type specific to an Organization.
- One or more Sub Types for any combination of Document Type and Organization assignment.

Sub Type requirements

- To use a Sub Type, there should be at least one Organization defined in MarkView.
- In AUSS, map and configure new Oracle responsibilities to the new roles that Sub Types creates, or manually add users to the new roles.

After you create a new Sub Type, MarkView automatically:

- Enables the Web Inquiry results to show the Sub Type.
- Adds Sub Type roles in MarkView that mirror the roles assigned to the Organization (Sub Type roles have no users assigned).
- Adds a new bar code cover page property for the document type that depends on the Organization property. Adding Sub Types changes how a scan operator completes the Bar Code Cover page information.

Add Sub Types

1. Log in to MarkView and navigate to **Administration** > **Module Admin**.
2. Select the **Organizations** tab.
3. To create a Sub Type:
   - For all Organizations, click **Global Configurations**, which creates Sub Types that are available to every organization in your company.
   - For an individual Organization, locate the organization for which to add Sub Types and click **Configuration**.
4. Select **Document Sub Types**. The **Document Sub Types** setup window opens.
5. Click **Add**. Complete the fields in the **Add Sub Types** window as follows:
   - **Document Type**: Select one or more document types for the Sub Type, for example, Non-PO invoice.
   - **Sub Type Name**: Enter a unique name for the Sub Type using up to 30 alphanumeric characters and no spaces.
   - **Sub Type Description**: Enter a description of the Sub Type using up to 255 characters.
   - **Sub Type Display Name**: Enter a unique display name for the Sub Type using up to 30 alphanumeric characters.

   This name appears on the Bar Code Cover page, in the invoice header, and when you use interactive queries.
6. Click **Insert**.
7. In MarkView Viewer, to show the Document Type and Sub Type, manually add them in **Quick Info Settings**.

Associate Sub Type roles with MarkView users

To use AUSS to associate MarkView users with Sub Type roles:

1. In Oracle Apps, create a new Oracle responsibility for the Sub Type.
2. Assign users to the new Oracle responsibility.
3. Map the new Oracle responsibility to the MarkView Profile.

   You can associate an Oracle responsibility to more than one profile.

   If a MarkView user belongs to multiple Sub Type roles, you can configure MarkView to allow the user to control which Sub Type role to activate.

For information about using AUSS, see Set up MarkView users with AUSS on page 28.

To manually assign users to Sub Type roles, see Add users to a role on page 142.

Change the default Sub Type selection

When you create a Sub Type, MarkView updates the Bar Code Cover page creation windows. When a scan operator creates a new bar code, the operator must select a Sub Type for any Organizations and Document Types that have Sub Type.

Sub Types are only available for selection when creating and using a Bar Code Cover Page. If you use Kofax Capture without a cover page, MarkView assigns the default Sub Type associated with Organization and Document Type.

To change the default Sub Type assignment:

1. Log in to MarkView and navigate to **Administration** > **Module Admin**.
2. Select the **Organizations** tab.
   - For a global Sub Type associated with all organizations, click **Global Configurations**.
   - For a Sub Type associated with an organization, locate the organization with the Sub Type and click **Configuration**.
3. Select **Document Sub Types**. The **Document Sub Types** setup window opens.
4. Locate the Sub Type to change and click **Update**.
5. In the **Default** list, select **Y**.
6. Click **Update**.

   Completing this procedure changes the default setting for the original Sub Type to **N**. You cannot change the original **Sub Type** to **N**. Select another **Sub Type** as the default. MarkView then changes the original **Sub Type** default setting to **N**.

Disable Sub Types

Although you cannot delete Sub Types, you can disable them. Disabling a Sub Type removes:

- The Sub Type from the list of available Sub Types in the Bar Code Generator.
- Any roles related to the Sub Type.

If an organization has multiple Sub Types for a document type, you cannot disable the Sub Type that serves as the default. Specify a different Sub Type as the default, then disable the first Sub Type.

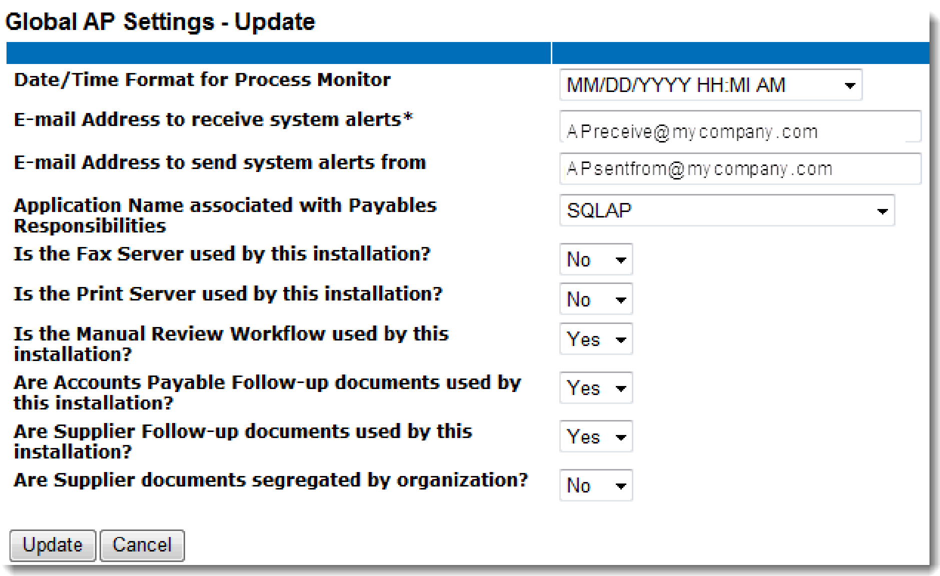
If the organization and document type combination has no other Sub Types defined, you can disable a Sub Type that serves as the default.

1. Log in to MarkView and navigate to **Administration** > **Module Admin**.
2. Select the **Organizations** tab.
   - For a global **Sub Type** associated with all Organizations, click **Global Configurations**.
   - For a **Sub Type** associated with an Organization, locate the organization with the **Sub Type** and click **Configuration**.
3. Select **Document Sub Types**. The **Document Sub Types** window opens.
4. Locate the **Sub Type** to disable and click **Update**.
5. In the **Enable** list, select **N**.
6. Click **Update**.

Configure Global AP Settings

This option lets you configure global settings for MarkView for Accounts Payable, such as the date and time format to appear in the Process Monitor, or the email address that should receive system alerts.

1. Log in to MarkView and navigate to **Administration** > **Module Admin**.
2. Select the **Organizations** tab.
3. Select **Global Configurations** > **AP Settings**.
4. Click **Update.**



5. Change your settings as follows:

Setting	Value
Date/Time Format for Process Monitor	Select the format that MarkView uses to show the date and time in the Process Monitor. (default: DD-MON-YYYY HH:MI:SS AM)
E-mail Address to receive system alerts	To receive system alerts, enter an email address for the administrator or administration group to receive the email. When a component exceeds the preset limit, MarkView will send an alert to the email specified. (default: none)
E-mail Address to send system alerts from	Enter the email address to identify from where the system alerts are sent. (default: none)
Application Name associated with Payables Responsibilities	Specify the Oracle application name associated with the Accounts Payables responsibility (default: SQLAP).

Setting	Value
Is the Print Server used by this installation?	Controls what appears in MarkView Viewer: Yes: Provides an option that lets the user print to the MarkView Print server as well as print directly to a printer. No (default): Does not provide the option to print to the server.
Is the Manual Review Workflow used by this installation?	Yes (default): Specifies that you use the manual review workflow. No: Specifies that you do not. This setting disables the Uncategorized Document document type, Bar Code Server status checks, and emails in MVT_Status.
Are Accounts Payable Follow-up documents used by this installation?	Yes (default): Specifies that you use AP Invoice follow-up documents. No: Specifies that you do not use AP Invoice follow-up documents.
Are Supplier Follow-up documents used by this installation?	Yes (default): Specifies that you use Supplier follow-up documents. No: Specifies that you do not use Supplier follow-up documents.
Are Supplier documents segregated by organization?	Lets you segregate inbound Supplier documents by organization. Doing so lets you to divide supplier entry work between supplier entry groups. To use this function, have a process in place for separating inbound documents (as in the mail room) to allow for specifying the proper organization during capture. Yes: Specifies that Supplier documents are assigned by organization. Lets you segregate incoming supplier entry work to specific supplier entry groups and users by organizations. No (default): Specifies that Supplier documents are assigned globally. Lets any supplier entry user process any supplier document; the work is not filtered or segregated by organization.

6. Click **Update** again to save your settings.

Set Role Configuration for all organizations

Most administrators never need to change the default settings for role configuration. The Role Configuration option streamlines the process of adding a role for all organizations or customizing how MarkView addresses roles when you create an organization.

Only change role configuration under the direction of Kofax Technical Support.

Role configuration settings work as follows:

- APP_FUNCTION: Makes existing roles available to all organizations that have the specified functionality granted through the Role Queue Privileges.
- NEW_ROLE: Creates a new role for each organization, which allows you to customize the Role Queue Privileges by organization.

Global Organization Role Configuration

Role Name	Configuration Type	Configuration Setting	Document Type		
AP ENTRY NON-PO	ORG	APP_FUNCTION		*Update*	*Delete*
AP ENTRY NON-PO	SUB_TYPE	NEW_ROLE	NON-PO INVOICE	*Update*	*Delete*
AP ENTRY PO	ORG	APP_FUNCTION		*Update*	*Delete*
AP ENTRY PO	SUB_TYPE	NEW_ROLE	PO INVOICE	*Update*	*Delete*
AP ENTRY PRE-APPROVED	ORG	APP_FUNCTION		*Update*	*Delete*

For example, if you set the configuration setting for AP ENTRY NON-PO to NEW_ROLE, MarkView creates a separate role for each organization in your system. You can then enable or disable the role functionality by organization. When you create a new organization, MarkView creates a new role for that organization.

If you set the role AP ENTRY PO to APP_FUNCTION, all organizations, including new ones that you create, have access to the functions for that role, like Invoice Entry or Security Examination.

Using a new role can provide more granular control over user permissions, but requires additional user setup.

Add Role Configuration

1. Log in to MarkView and navigate to **Administration** > **Module Admin**.
2. Select the **Organizations** tab.
3. Select **Global Configurations** > **Role Configuration**.
4. Click **Insert** and select role settings:
    - **Role ID**
    - **Configuration Type**

      Org: To associate the role with organizations

      Sub Type: To associate the role with Sub Types
    - **Configuration Setting**

      Application Function: Creates one role that is available to all organizations

      New MarkView Role: Creates a separate role for each organization
    - (Optional) Document Type.
5. Click **Insert** to save the change.

Modify the Role Configuration setting

1. Log in to MarkView and navigate to **Administration** > **Module Admin**.
2. Select the **Organizations** tab.
3. Select **Global Configurations** > **Role Configuration**.
4. Locate the line with the role to configure and click **Update**.

5. Select the Configuration Setting to use.
   - APP_FUNCTION: Creates one role that is available to all organizations
   - NEW_ROLE: Creates a separate role for each organization
6. Click **Update** to save the change.

Assign ERP responsibilities to MarkView organizations

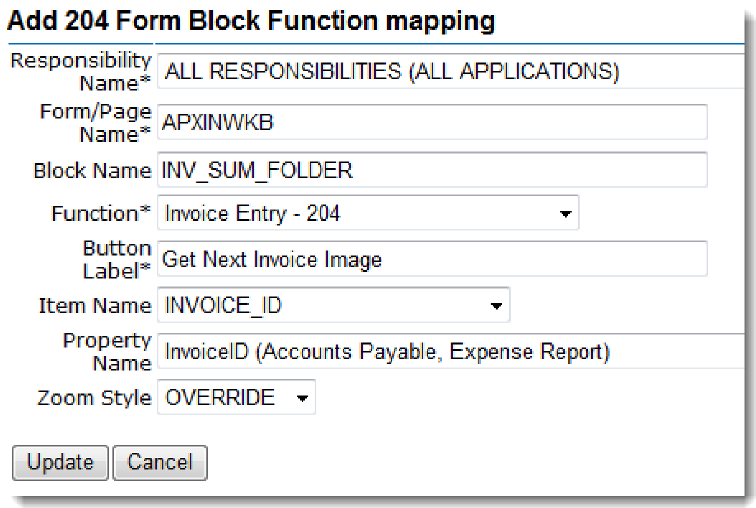
By default, MarkView expects AUSS to automatically assign ERP Responsibilities to MarkView functions. You can override the defaults and assign Oracle ERP responsibilities to specific MarkView organizations.

1. Log in to MarkView and navigate to **Administration** > **Module Admin**.
2. Select the **Organizations** tab.
3. Continue as follows:
   - To map functions for a single organization, locate the organization and click the associated **Configuration** button.
   - To map functions across all organizations, click Global Configuration. The **Global Preferences** page opens.
4. Click **Form Block Function Mappings**.
   The XXX Form Block Function window opens, displaying assigned responsibilities. (XXX is either the Org Short Name or the word "Global," indicating whether the mapping applies to all organizations or a specific organization.)

204 Form Block Function

Responsibility Name	Form/Page Name	Block Name	Function	Button Label
ALL RESPONSIBILITIES (ALL APPLICATIONS)	/oracle/apps/pos/supplier/webui/SuppCrtPG		Supplier Entry	Get Next Supplier Image
ALL RESPONSIBILITIES (ALL APPLICATIONS)	APXINWKB	INV_SUM_FOLDER	Invoice Entry - 204	Get Next Invoice Image
ALL RESPONSIBILITIES (ALL APPLICATIONS)	APXVDMVD	VNDR	Supplier Entry	Get Next Supplier Image

5. Continue as follows:
   - To map a new function.
     a. Click **Add**.
     b. Select a form in the preconfigured Form list or enter a unique name for the form to add and click **Open**.
   - To modify an assigned function
     a. Locate the function to modify.
     b. Click **Update**.
6. The Add XXX Form Block Function mapping window opens, where XXX is the Org Short name or the word "Global" indicating a global mapping that applies to all organizations.



Although the form contains many columns, you may only need to change the **Responsibility Name**.

7. Complete the fields as follows:

Field Name	Description
Responsibility Name*	From Oracle, the name of the responsibility to map to the selected organization or globally to all organizations.
Form/Page Name*	From Oracle, the name of the form or page.
Block Name	From Oracle, the name of the block within a form (only applies when From/ Page Name is the name of a form).
Function*	From MarkView, the task to map to this responsibility, for example, examine workflow queues for the VISTEST1 organization
Button Label*	The text to appear on the Oracle zoom button.
Item Name	From Oracle, the document entity.
Property Name	From MarkView, the Work Item Class and property name that stores the value.
Zoom Style	Indicates what appears on the Oracle button after completing the integration with MarkView. Default: Standard view If Standard does not work, select Override.
*Required fields	

8. Click **Insert**.

Map Accounting Details

Accounting Details features in MarkView let you associate Oracle responsibilities with an organization or project, and specify the account numbers to use for charging organizations. The

Accounting Details associated with an invoice appear in MarkView Viewer when the invoice is displayed.

Map Accounting Details to all organizations

1. Log in to MarkView and navigate to **Administration** > **Module Admin**.
2. Select **Organizations** > **Global Configuration**.
3. Select **Accounting Details - Global Mappings**.
4. Click **Insert.**
5. On the Add Accounting Detail Mappings page, select values for the following:
   - **ACD Tool Name**: Enter the action type to map. Action types that appear in the list depend on those defined in your system configuration, for example, Distributions or Project Distributions.
   - **Responsibility**: Select a Responsibility Key to define the coding privileges for the Organization being configured. For Oracle R12, the Responsibility you select must be configured using the MO: Operating Unit profile option relevant to the Organization.
   - **Application**: Select the application associated with the Responsibility selected (for example, SQLAP).

   MarkView applies the tools and responsibilities you add to all organizations.
6. Click **Insert**.

Map Accounting Details to an organization

1. Log in to MarkView and navigate to **Administration** > **Module Admin**.
2. Select the **Organizations** tab.
3. Locate the organization for which to map accounting details and click **Configuration**.
4. Select **Accounting Detail Mappings**.
5. Click **Add**.
6. On the Add Accounting Detail Mappings page, select values for the following:
   - **ACD Tool Name**: Enter the action type to map to the organization. Action types that appear in the list depend on those defined in your system configuration, for example, Distributions or Project Distributions.
   - **Responsibility**: Select a Responsibility Key to define the coding privileges for the Organization being configured. For Oracle R12, the Responsibility you select must be configured using the MO: Operating Unit profile option relevant to the Organization.
   - **Application**: Select the application associated with the Responsibility selected (for example, SQLAP).

   MarkView applies the tool and responsibility you specify to the selected organization and application.
7. Click **Insert**.

Set up Accounting Details reference mappings for all organizations

1. Log in to MarkView and navigate to **Administration** > **Module Admin**.
2. Select **Organizations** > **Global Configuration**.

3. Select **Accounting Detail - Reference Mappings**.
4. Click **Insert**.

   Do not change the values of any unused fields.

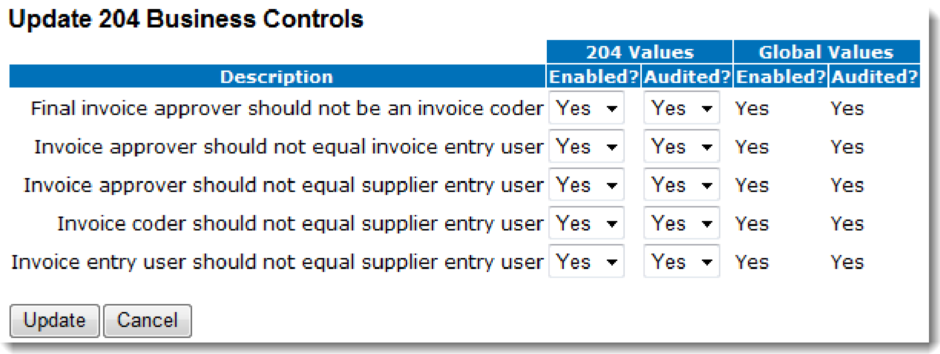
   - Reference Type: Select the invoice line field used to derive the context value for Descriptive Flexfields.
     - Line Type
     - Line Type Lookup Code
     - Organization ID
     - Tax ID
     - Tax Name
   - Reference Field: Not used.
   - Is Context
     - **Yes**: MarkView automatically determines the Descriptive Flexfield context value based on the Reference field.
     - **No**: A MarkView user selects the context when acting on the invoice.
   - Require Subform
     - **Yes** (Required if using Reference Type): Requires the user to enter data for Descriptive Flexfields using a subform in the **Accounting Details**.
     - **No**: Allows the user to enter data for Descriptive Flexfields directly on the main form in the **Accounting Details**.
5. Click **Insert**.

Set Business Controls

You can configure MarkView to prevent and log violations that occur when a MarkView user performs an action that can be interpreted as a segregation of duties violation or conflict of interest, both of which can result in fraud.

For example, if you enable "invoice entry user should not equal supplier entry user," MarkView requires the invoice to undergo an extra review step.

1. Log in to MarkView and navigate to **Administration** > **Module Admin**.
2. Select the **Organizations** tab.
3. To set business controls:
   - **For all Organizations**: Click **Global Configurations**.
   - **For an Organization**: Locate the organization for which to set controls and click **Configuration**.
4. Select **Business Controls**.
5. Click **Update**.



6. For each control, select the settings to implement:
   - Enabled: Enables or disables the business control that controls an action.
     - Yes: Enables the control
     - No: Disables the control
   - Audited: Specifies whether or not to log violations to an audit table in the database.
     - Yes: Logs violations
     - No: Does not log violations

Control Description	Control Setting
Final invoice approver should not be an invoice coder.	Moves the work item to next person in the hierarchy to approve.
Invoice approver should not equal invoice entry user.	Prevents the approver from taking the Approve action.
Invoice approver should not equal supplier entry user.	Prevents the approver from taking the Approve action.
Invoice coder should not equal supplier entry user.	Prevents the invoice coder from saving distributions.
Invoice entry user should not equal supplier entry user.	Allows the user to complete the entry, but routes the invoice to the Invoice Entry Review queue.

7. After making your changes, click **Update.**

Configure Invoice Return Reasons

Before configuring an invoice return reason for an organization, the return reason must already exist. To create an invoice return reason, see Create Return to Supplier Reasons on page 84.

1. Log in to MarkView and navigate to **Administration** > **Module Admin** > **Organizations**.
2. Continue as follows:
   - If assigning invoice return reasons for a selected organization, locate the organization and click **Configuration.**
   - If assigning invoice return reasons for all organizations, select **Global Configuration**.
3. Select **Invoice Return Reasons**.

The page displays the reasons already assigned to the organization.

4. Click **Add** and select the Message Name to add.
5. Repeat this procedure for each reason to include in the **Return Reason** list of values.

Add PO Holds

The ERP system contains PO Holds that you can make available for use in MarkView workflows. When you add a PO Hold, you select from the list of defined PO Holds, and set the order of processing.

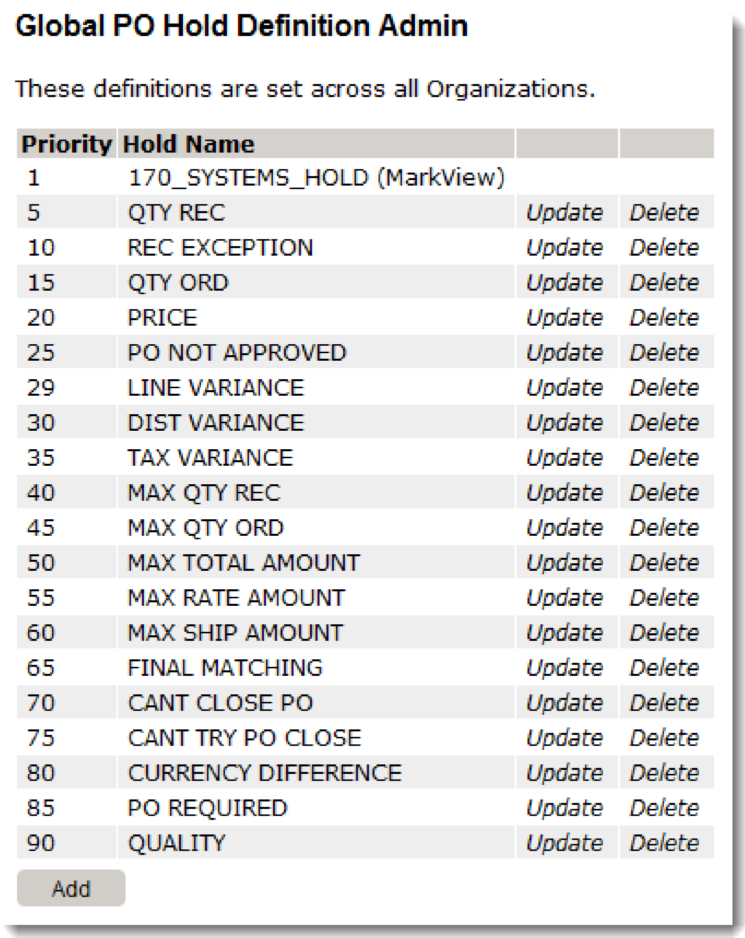
Add a PO Hold definition to MarkView

Hold definitions are defined across all organizations.

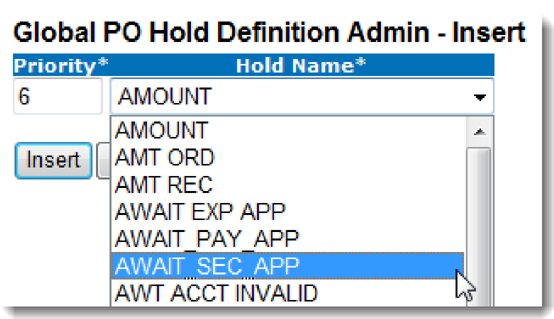
1. Log in to MarkView and navigate to **Administration** > **Module Admin**.
2. Select **Organizations** > **Global Configuration**.

   > You can only add Holds through Global Configuration although you can route Holds through specific organizations.

3. Click **PO Hold Definition**. The **PO Hold Definition Admin** page opens.



4. Click **Add.**



5. Select the name of the Hold to add. Only holds defined in the ERP system appear in the list.
6. Enter a positive number to designate the order that MarkView will use to process the hold. (The number appears under the column heading "**Priority**.") The lower the number, the sooner in the sequence that MarkView processes the hold. The MarkView hold must be the first one processed.

Verify that the 170_SYSTEMS_HOLD (MarkView) Hold Definition has the lowest number in the list.

7. Click **Insert**.
8. Repeat this procedure for each PO Hold to add to MarkView.

Change the order of PO Hold processing

1. Log in to MarkView and navigate to **Administration** > **Module Admin**.
2. Select **Organizations** > **Global Configuration**.
3. Click **PO Hold Definition**. The **PO Hold Definition Admin** page opens.
4. Locate the name of the Hold to change and click the **Update** link in that line.
5. Change the number and click **Update.**
   The number appears under the column heading "**Priority**." The lower the number, the sooner in the sequence that MarkView processes the hold. The MarkView hold must be the first one processed. You cannot change the order of the MarkView hold.

Remove a PO Hold from MarkView

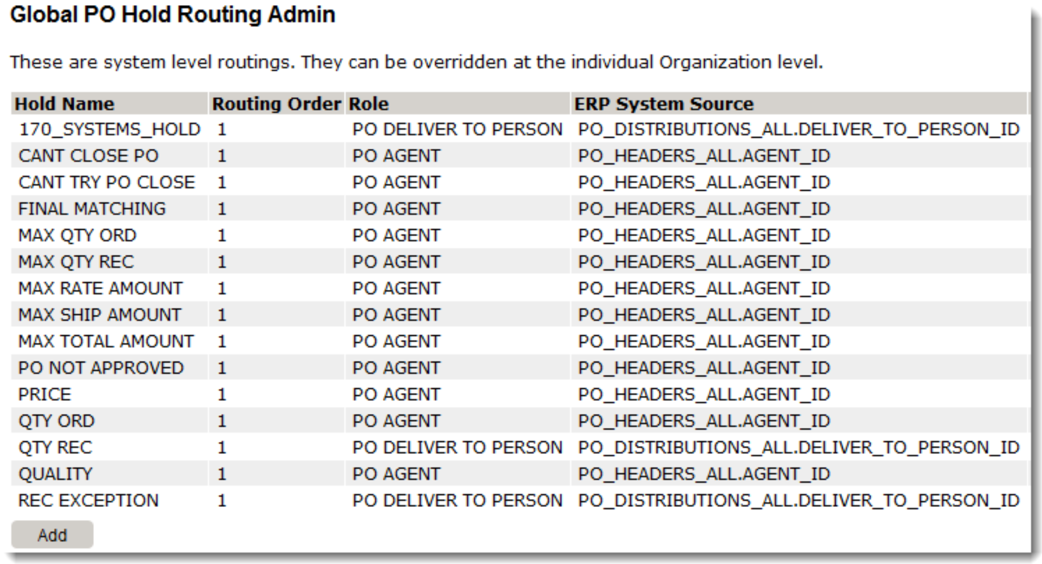
1. Log in to MarkView and navigate to **Administration** > **Module Admin**.
2. Select **Organizations** > **Global Configuration**.
3. Click **PO Hold Definition**. The PO Hold Definition Admin page opens.
4. Locate the name of the Hold to remove and click the **Delete** link in that line.
5. Click **Delete** again.

Establish routing based on PO Holds

Routing that you establish at the global level can be modified at the organization level. For the hold to be available at the organization level, the hold should be defined at the global level.

Set Up Global Routing

1. Log in to MarkView and navigate to **Administration** > **Module Admin**.
2. Select the **Organizations** tab.
3. Select **Global Configurations** and **PO Hold Routing**.



Global PO Hold Routing Admin

These are system level routings. They can be overridden at the individual Organization level.

Hold Name	Routing Order	Role	ERP System Source
170_SYSTEMS_HOLD	1	PO DELIVER TO PERSON	PO_DISTRIBUTIONS_ALL.DELIVER_TO_PERSON_ID
CANT CLOSE PO	1	PO AGENT	PO_HEADERS_ALL.AGENT_ID
CANT TRY PO CLOSE	1	PO AGENT	PO_HEADERS_ALL.AGENT_ID
FINAL MATCHING	1	PO AGENT	PO_HEADERS_ALL.AGENT_ID
MAX QTY ORD	1	PO AGENT	PO_HEADERS_ALL.AGENT_ID
MAX QTY REC	1	PO AGENT	PO_HEADERS_ALL.AGENT_ID
MAX RATE AMOUNT	1	PO AGENT	PO_HEADERS_ALL.AGENT_ID
MAX SHIP AMOUNT	1	PO AGENT	PO_HEADERS_ALL.AGENT_ID
MAX TOTAL AMOUNT	1	PO AGENT	PO_HEADERS_ALL.AGENT_ID
PO NOT APPROVED	1	PO AGENT	PO_HEADERS_ALL.AGENT_ID
PRICE	1	PO AGENT	PO_HEADERS_ALL.AGENT_ID
QTY ORD	1	PO AGENT	PO_HEADERS_ALL.AGENT_ID
QTY REC	1	PO DELIVER TO PERSON	PO_DISTRIBUTIONS_ALL.DELIVER_TO_PERSON_ID
QUALITY	1	PO AGENT	PO_HEADERS_ALL.AGENT_ID
REC EXCEPTION	1	PO DELIVER TO PERSON	PO_DISTRIBUTIONS_ALL.DELIVER_TO_PERSON_ID

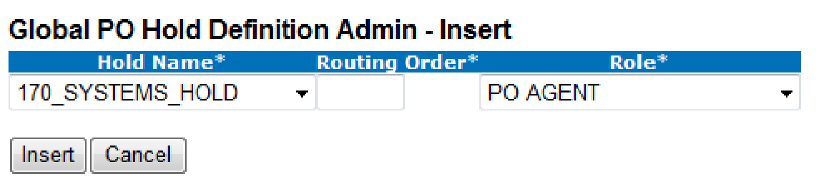
Add

The fourth column, ERP System Source, displays the user or user group to handle this kind of PO hold. The value of Source falls into one of the following categories:

- NONE.NONE: Routes a work item with a hold to the AP group.
- Value other than NONE.NONE: Identifies a table and column with the Oracle Payables database. The table/column combination identifies the user responsible for handling this work item.

  For example, the PO NOT APPROVED row is set to PO_HEADERS_ALL.AGENT_ID. When the system detects a PO NOT Approved hold, the system routes the invoice to the user named in the PO_HEADERS_ALL.AGENT_ID column for this work item.

4. Click **Add**. The page opens.



5. Complete the form as follows:
   - Hold Name: Select the name of the hold to assign. Only holds defined in the ERP system and in MarkView **PO Hold Definitions** appear in the list.
   - Order: Enter a positive number to designate to which role the hold is routed first.

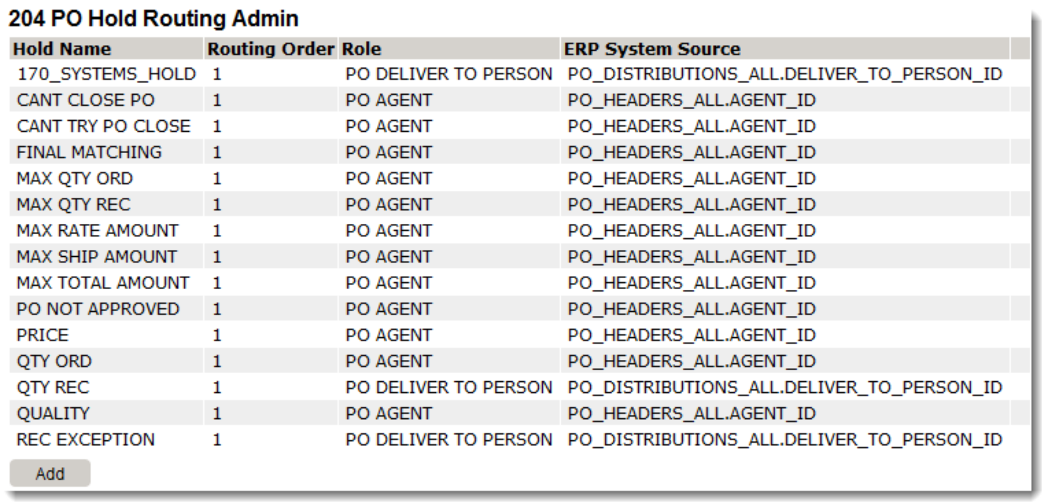
     Verify that the MarkView Hold has the highest rank in the list.

   - Role: Select the MarkView Role to which MarkView routes the invoice.
6. Click **Insert**.
7. Repeat this procedure for each PO Hold to assign.

For more information about the available roles and groups, see the Hold Resolution section of the *Kofax MarkViewFeatures Guide for Oracle E-Business Suite*.

Set up routing by organizations

1. Log in to MarkView and navigate to **Administration** > **Module Admin**.
2. Select the **Organizations** tab.
3. Locate the organization line and click **Configuration**.
4. Select **PO** Hold **Routing**.



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Hold Name	Routing Order	Role	ERP System Source
170_SYSTEMS_HOLD	1	PO DELIVER TO PERSON	PO_DISTRIBUTIONS_ALL.DELIVER_TO_PERSON_ID
CANT CLOSE PO	1	PO AGENT	PO_HEADERS_ALL.AGENT_ID
CANT TRY PO CLOSE	1	PO AGENT	PO_HEADERS_ALL.AGENT_ID
FINAL MATCHING	1	PO AGENT	PO_HEADERS_ALL.AGENT_ID
MAX QTY ORD	1	PO AGENT	PO_HEADERS_ALL.AGENT_ID
MAX QTY REC	1	PO AGENT	PO_HEADERS_ALL.AGENT_ID
MAX RATE AMOUNT	1	PO AGENT	PO_HEADERS_ALL.AGENT_ID
MAX SHIP AMOUNT	1	PO AGENT	PO_HEADERS_ALL.AGENT_ID
MAX TOTAL AMOUNT	1	PO AGENT	PO_HEADERS_ALL.AGENT_ID
PO NOT APPROVED	1	PO AGENT	PO_HEADERS_ALL.AGENT_ID
PRICE	1	PO AGENT	PO_HEADERS_ALL.AGENT_ID
QTY ORD	1	PO AGENT	PO_HEADERS_ALL.AGENT_ID
QTY REC	1	PO DELIVER TO PERSON	PO_DISTRIBUTIONS_ALL.DELIVER_TO_PERSON_ID
QUALITY	1	PO AGENT	PO_HEADERS_ALL.AGENT_ID
REC EXCEPTION	1	PO DELIVER TO PERSON	PO_DISTRIBUTIONS_ALL.DELIVER_TO_PERSON_ID

Add

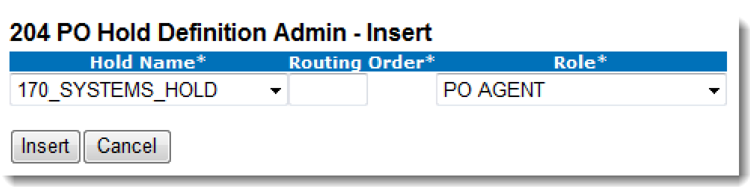
"170_SYSTEMS_HOLD" under the Hold Name column identifies to whom the invoice should go for MarkView 2-way receipt verification. The ERP System Source column displays the user or user group to handle this kind of PO hold. The system controls what appears in this column.

The value of Source falls into one of the following categories:

- NONE.NONE: Routes the work item to the AP group.
- Value other than NONE.NONE: Identifies a table and column with the Oracle Payables database. The table/column combination identifies the user responsible for handling this work item.

  For example, the PO NOT APPROVED row is set to PO_HEADERS_ALL.AGENT_ID. When the system detects a PO NOT Approved hold, the system routes the invoice to the user named in the PO_HEADERS_ALL.AGENT_ID column for this work item.

5. Click **Add**. The PO Hold Definition Admin page opens.



6. Complete the form as follows:
   - Hold Name: Select the name of the hold to assign. Only holds defined in the ERP system and in MarkView PO Hold Definitions appear in the list.
   - Order: Enter a positive number to designate the order in which the hold is processed. The lower the number, the higher the processing priority. The higher the number, the lower the processing priority. MarkView processes holds with the highest priority first. The MarkView hold must the last one processed.

     > Verify that the MarkView Hold has the highest priority number in the list.

   - Role: Select the MarkView Role to which MarkView routes the invoice.
7. Click **Insert**.
8. Repeat this procedure for each PO Hold to assign.

Remove a Hold routing globally

1. Log in to MarkView and navigate to **Administration** > **Module Admin**.
2. Select the **Organizations** tab.
3. Select Global Configurations and PO Hold Routing.

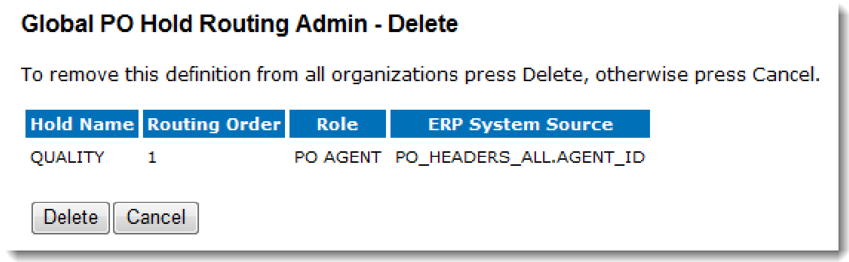
Global PO Hold Routing Admin

These are system level routings. They can be overridden at the individual Organization level.

Hold Name	Routing Order	Role	ERP System Source
170_SYSTEMS_HOLD	1	PO DELIVER TO PERSON	PO_DISTRIBUTIONS_ALL.DELIVER_TO_PERSON_ID
CANT CLOSE PO	1	PO AGENT	PO_HEADERS_ALL.AGENT_ID
CANT TRY PO CLOSE	1	PO AGENT	PO_HEADERS_ALL.AGENT_ID
FINAL MATCHING	1	PO AGENT	PO_HEADERS_ALL.AGENT_ID
MAX QTY ORD	1	PO AGENT	PO_HEADERS_ALL.AGENT_ID
MAX QTY REC	1	PO AGENT	PO_HEADERS_ALL.AGENT_ID
MAX RATE AMOUNT	1	PO AGENT	PO_HEADERS_ALL.AGENT_ID
MAX SHIP AMOUNT	1	PO AGENT	PO_HEADERS_ALL.AGENT_ID
MAX TOTAL AMOUNT	1	PO AGENT	PO_HEADERS_ALL.AGENT_ID
PO NOT APPROVED	1	PO AGENT	PO_HEADERS_ALL.AGENT_ID
PRICE	1	PO AGENT	PO_HEADERS_ALL.AGENT_ID
QTY ORD	1	PO AGENT	PO_HEADERS_ALL.AGENT_ID
QTY REC	1	PO DELIVER TO PERSON	PO_DISTRIBUTIONS_ALL.DELIVER_TO_PERSON_ID
QUALITY	1	PO AGENT	PO_HEADERS_ALL.AGENT_ID
REC EXCEPTION	1	PO DELIVER TO PERSON	PO_DISTRIBUTIONS_ALL.DELIVER_TO_PERSON_ID

Add

4. Locate the hold to remove and click **Delete**.
5. To confirm the removal, click **Delete** again.



Global PO Hold Routing Admin - Delete

To remove this definition from all organizations press Delete, otherwise press Cancel.

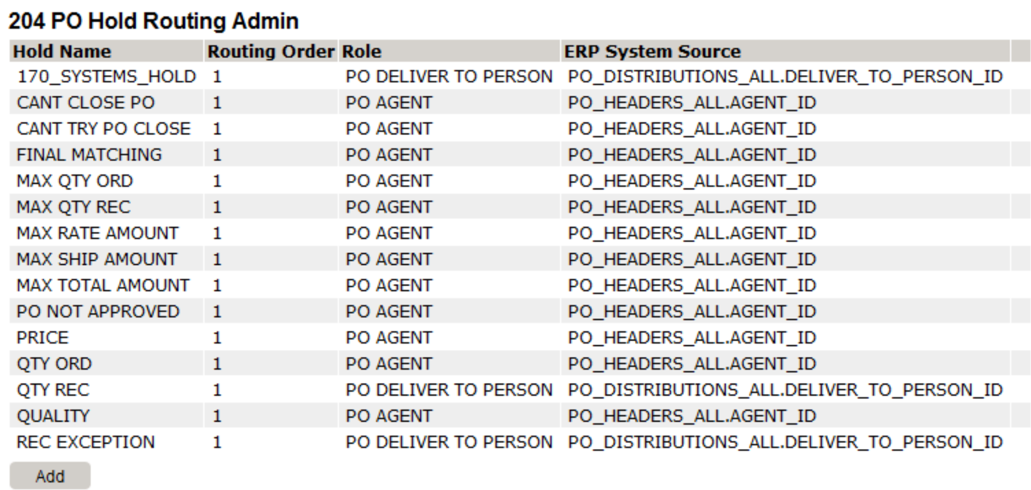
Hold Name	Routing Order	Role	ERP System Source
QUALITY	1	PO AGENT	PO_HEADERS_ALL.AGENT_ID

Delete Cancel

Remove a Hold routing by organization

> You can only delete a hold by organization if the hold was only added to the organization.

1. Log in to MarkView and navigate to **Administration** > **Module Admin**.
2. Select the **Organizations** tab.
3. Locate the organization line and click **Configuration**.
4. Select **PO Hold Routing** Routing.



204 PO Hold Routing Admin

Hold Name	Routing Order	Role	ERP System Source
170_SYSTEMS_HOLD	1	PO DELIVER TO PERSON	PO_DISTRIBUTIONS_ALL.DELIVER_TO_PERSON_ID
CANT CLOSE PO	1	PO AGENT	PO_HEADERS_ALL.AGENT_ID
CANT TRY PO CLOSE	1	PO AGENT	PO_HEADERS_ALL.AGENT_ID
FINAL MATCHING	1	PO AGENT	PO_HEADERS_ALL.AGENT_ID
MAX QTY ORD	1	PO AGENT	PO_HEADERS_ALL.AGENT_ID
MAX QTY REC	1	PO AGENT	PO_HEADERS_ALL.AGENT_ID
MAX RATE AMOUNT	1	PO AGENT	PO_HEADERS_ALL.AGENT_ID
MAX SHIP AMOUNT	1	PO AGENT	PO_HEADERS_ALL.AGENT_ID
MAX TOTAL AMOUNT	1	PO AGENT	PO_HEADERS_ALL.AGENT_ID
PO NOT APPROVED	1	PO AGENT	PO_HEADERS_ALL.AGENT_ID
PRICE	1	PO AGENT	PO_HEADERS_ALL.AGENT_ID
QTY ORD	1	PO AGENT	PO_HEADERS_ALL.AGENT_ID
QTY REC	1	PO DELIVER TO PERSON	PO_DISTRIBUTIONS_ALL.DELIVER_TO_PERSON_ID
QUALITY	1	PO AGENT	PO_HEADERS_ALL.AGENT_ID
REC EXCEPTION	1	PO DELIVER TO PERSON	PO_DISTRIBUTIONS_ALL.DELIVER_TO_PERSON_ID

Add

5. Locate the line with the hold routing and click **Delete**.
6. To confirm the removal, click **Delete** again.

Change an organization configuration

Changing the organization configuration modifies the workflow behavior.

1. Log in to MarkView and navigate to **Administration** > **Module Admin**.
2. Select the **Organizations** tab. The Org Admin page opens.

3. Locate the organization to configure and click **Configuration**. The Preferences page for the organization opens.
4. Click **Update**, which makes preference options available and shows the global settings for each option. If you leave an option blank, MarkView uses the global setting.
5. In the form, specify the values to use.
6. Click **Update**.

Copy a configuration from another organization

Applying the configuration from another organization changes the following:

- Accounting Details Mapping
- Business Control Settings
- Default GL Account, Hierarchy, and Instance
- Document Sub Types
- Invoice Return Reasons
- PO Hold Routing
- Preference values

To use the configuration from another organization:

1. Log in to MarkView and navigate to **Administration** > **Module Admin**.
2. Select the **Organizations** tab.
3. Locate the organization to configure and click **Replace Configuration with new Template**.
4. Select the organization template to copy and click **Update**.

Remove an organization

Deleting an organization removes all organization configuration records, including any associated MarkView hierarchy. You can only delete an organization when

- The Organization User Group has no users assigned as members

  You can delete an organization that has Organization Roles with assigned members.

- All associated work items are in one of the following end-state queues:
  - Archive
  - Cancelled
  - Completed
  - Complete Expense Reports
  - Complete Packets
  - Deleted Expense Reports
  - Recycle Bin

- Redirected Work Items
- Rescan Complete
- Returned Invoices

To delete an organization that meets the preceding requirements:

1. Log in to MarkView and navigate to **Administration** > **Module Admin**.
2. Select the **Organizations** tab.
3. Locate the organization to remove and click **Delete**.
4. In the confirmation window, click **Delete**.

Add organizations to MarkView user groups

To give a MarkView User Group authorization to process documents for one or more organizations, add the organization to the user group as follows:

1. Log in to MarkView and navigate to **Administration** > **MarkView Admin**.
2. Select the **User Groups** tab.
3. Locate the group for which to add organization authorization and click **Details**.
4. Select the **User Group Org Auths** tab.
5. Click **Add** to list the available organizations.
6. Select the Organization to add to the group and click **Save**.

Support multiple organizations

MarkView supports the Oracle multi-organization feature, which lets you use Oracle Applications responsibilities to control documents and functions that users in different organizations can access.

For example, a company could have an AP organization in London and another in Boston. You can set up MarkView so that users in the AP organization in London interact only with British documents and the AP organization in Boston interacts only with the New England documents.

To establish multi-organization support, use the Organization menu options

- Add Organizations to MarkView (see Add an organization to MarkView on page 54).
- If not using AUSS, map Form Block Functions to Oracle Applications Responsibilities (see Assign ERP responsibilities to MarkView organizations on page 69). Use the Global Configuration settings to configure default settings for multiple organizations.

Chapter 4

Configure Accounts Payable settings

MarkView for Accounts Payable helps you streamline your accounts payable processes. In addition to capturing electronic images of invoices, MarkView associates the captured image to the existing Oracle record document. MarkView lets a user view the captured image, act on the work item to move it through the workflow, and track the progress of the work item.

Some of the settings described in this chapter require you to change MarkView preferences. See Change preference settings on page 198 for information about changing preferences.

Recycle review options

The manual review process lets an employee send a captured image to the recycle bin, or have a second employee review the image quality. The second employee can accept or reject the recycle request and transition the document accordingly.

To enable recycle review, set the MVAP_REVIEW_RECYCLE preference to TRUE.

Change the frequency of Web Inbox notifications

Employees who have items in their MarkView Web Inbox receive regular email notification. Configure the frequency of these notifications and the message content.

By default, MarkView sends notifications once a day.

To alert employees every time a work item arrives in their Web Inbox, set the MVAP_EMAIL_OPTION to PER_ITEM.

For more information about Web Inbox email notifications, see the following preference descriptions in MarkView preferences on page 201:

- MVT_MAIL_FROM
- MVT_MAIL_FROM_NAME
- MVERP_MAINTENANCE_EMAIL_ADDRESS

Set up advanced-search capabilities for Web Inquiry

MarkView lets you enable advanced-search capabilities for some or all of your MarkView users. When you enable this feature, those who have permission can select a basic search page or one that contains additional fields.

Web Inquiry allows you to search the ERP system for invoices. This option is available when an employee uses MarkView Web Inquiry - AP Invoices or MarkView Web Inquiry - My History to perform a search.

Web Inquiry document link works only if an AP Invoice document is attached to an invoice.

Create Return to Supplier Reasons

You can create return invoice reasons that meet your business needs. By default, the system provides the following return reasons:

- Invalid Invoice
- Duplicate Invoice
- Purchase Order Number Required on Invoice
- Contact Name Number Required on Invoice

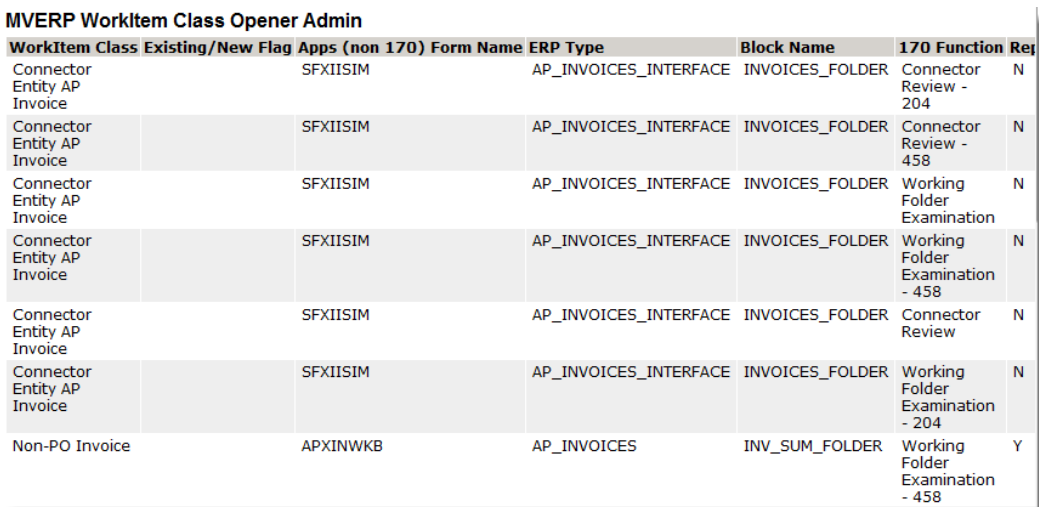
To create values for the LOV for the Return Reason field:

1. Log in to MarkView and navigate to **Administration** > **MarkView Admin**.
2. Select the **Messages** tab.
3. Click **Add** and complete the form as follows:
   - **Component**: In the list, select MVAP_RETURN_REASON.
   - **Message Name**: Enter a name, Not_Our_Supplier, for example.
   - **Message Type**: In the list, select Label.
   - **Description**: (Optional) Enter a description.
   - **Retain?**: In the list, select **Yes**.
   - **Changeable?**: In the list, select **Yes**.
   - **Style**: (Optional) This field does not require a value.
4. Click **Save**.
5. Select and complete the **Message Text Translations** subtab for the message:
   - **Language Name**: In the list, select the appropriate language.
   - **Text Translation**: Enter a description of the reason for the return, for example, "We no longer do business with this supplier."
6. Click **Save**.
   You do not need to complete the other subtabs.
7. Repeat this procedure for each reason to include in the **Return Reason** list of values.

Control how Work Items open

The work item (WI) Class Opener and WI Class Opener Param pages control what happens when an employee opens an invoice from the Working Folder.

Because the WI Class Opener and WI Class Opener Param pages are specific to Oracle Applications, only someone knowledgeable about the ERP should add WI Class Openers.



MVERP WorkItem Class Opener Admin

WorkItem Class	Existing/New Flag	Apps (non 170) Form Name	ERP Type	Block Name	170 Function	Rep
Connector Entity AP Invoice		SFXIISIM	AP_INVOICES_INTERFACE	INVOICES_FOLDER	Connector Review - 204	N
Connector Entity AP Invoice		SFXIISIM	AP_INVOICES_INTERFACE	INVOICES_FOLDER	Connector Review - 458	N
Connector Entity AP Invoice		SFXIISIM	AP_INVOICES_INTERFACE	INVOICES_FOLDER	Working Folder Examination	N
Connector Entity AP Invoice		SFXIISIM	AP_INVOICES_INTERFACE	INVOICES_FOLDER	Working Folder Examination - 458	N
Connector Entity AP Invoice		SFXIISIM	AP_INVOICES_INTERFACE	INVOICES_FOLDER	Connector Review	N
Connector Entity AP Invoice		SFXIISIM	AP_INVOICES_INTERFACE	INVOICES_FOLDER	Working Folder Examination - 204	N
Non-PO Invoice		APXINWKB	AP_INVOICES	INV_SUM_FOLDER	Working Folder Examination - 458	Y

The Work Item Class Opener page displays the following information.

Field	Description
Work Item Class	Shows the name of the work item class.
Existing/New Flag	Does not apply to Oracle sites.
Apps (non 170) Form Name	Shows the name of the Oracle Applications Form for MarkView to use for the specified Work Item Class. For example, if you are configuring the Oracle Invoice Workbench, select **APXINWKB**.
ERP Type	Reserved for future use.
Block Name	Shows the name of the block in the Apps Form Function for the system to populate. Data from a specified record populates the selected Block Name.
170 Function	Specifies the MarkView Process function for the system to use when retrieving a MarkView document that belongs to this Work Item Class. When configuring MarkView for Accounts Payable, you often select a Working Folder function.

Field	Description
Replace Where (not shown)	Y: Enables the system to run a query using the designated function and information in the WI Class Open Param form to find a record to load into Oracle Applications. Most sites use this setting. N: Keeps the system from running a query using anything other than the default Replace Where clause.
Apps Form Function (not shown)	Shows the name of the Oracle Applications Form function. For example, if you are configuring MarkView for Accounts Payable to open the Invoice Workbench form, select AP_APXINWKB.

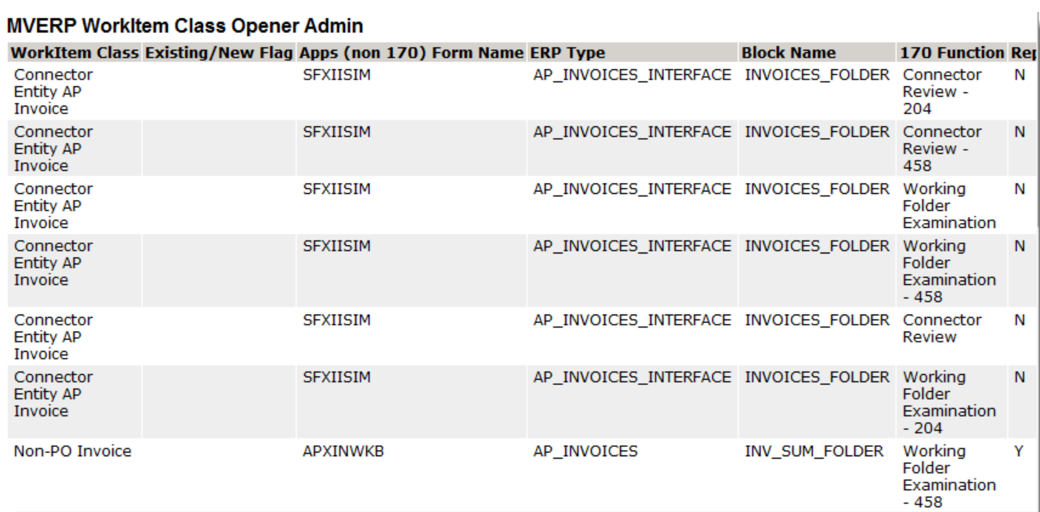
Change or add WI Class Opener

1. Log in to MarkView and navigate to **Administration** > **Module Admin**.
2. Select the **WI Class Opener** tab. The Work Item Class Opener Admin page opens.
3. Continue as follows:
   - To change a WI Class Opener, select the row to change and click **Update.**
   - To add a WI Class Opener, scroll to the bottom of the window and click **Insert**.
4. After making your changes or additions, click **Update** or **Insert**, as appropriate.
5. Continue to the next section, Change or add WI Class Opener parameters on page 86, to complete the process.

Change or add WI Class Opener parameters

Assign one or more parameters to the new Work Item Class Opener row.

1. Log in to MarkView and navigate to **Administration** > **Module Admin**.
2. Select the **WI Class Opener Param** tab. The Work Item Class Opener Param Admin form opens.



MVERP WorkItem Class Opener Admin

WorkItem Class	Existing/New Flag	Apps (non 170) Form Name	ERP Type	Block Name	170 Function	Rep
Connector Entity AP Invoice		SFXIISIM	AP_INVOICES_INTERFACE	INVOICES_FOLDER	Connector Review - 204	N
Connector Entity AP Invoice		SFXIISIM	AP_INVOICES_INTERFACE	INVOICES_FOLDER	Connector Review - 458	N
Connector Entity AP Invoice		SFXIISIM	AP_INVOICES_INTERFACE	INVOICES_FOLDER	Working Folder Examination	N
Connector Entity AP Invoice		SFXIISIM	AP_INVOICES_INTERFACE	INVOICES_FOLDER	Working Folder Examination - 458	N
Connector Entity AP Invoice		SFXIISIM	AP_INVOICES_INTERFACE	INVOICES_FOLDER	Connector Review	N
Connector Entity AP Invoice		SFXIISIM	AP_INVOICES_INTERFACE	INVOICES_FOLDER	Working Folder Examination - 204	N
Non-PO Invoice		APXINWKB	AP_INVOICES	INV_SUM_FOLDER	Working Folder Examination - 458	Y

3. Continue as follows:
   - To change a **WI Class Opener Param**, select the row to change and click **Update.**

- To add a **WI Class Opener Param**, scroll to the bottom of the window and click **Insert**.

4. Complete the **Work Item Class Opener Param Admin** form.

Field	Description
Work Item Class	Enter the value to use when creating a **Work Item Class Opener**.
Function	Specify the value specified in the **Function** column when creating a **Work Item Class Opener**.
Form Param	**Y**: Enable the system to pass one or more parameters to the function **N**: Prevent the system from passing parameters to the function. If the function does not accept parameters, set this field to **N**.
Param Name	Enter the name of the parameters to pass; for example, if you are configuring the Oracle Invoice Workbench, enter INVOICE_ID.
Param Seq	Enter the parameter sequence in the function call. For example, if a function receives two parameters, set **Param Seq** to **1** for the first parameter and **Param Seq** to **2** for the second parameter.
Constant Value	If you set **Form Param** to **Y**, place a value in either **Constant Value** or **WI Class Prop**, but not in both. To pass the same constant to each invocation of the function, enter a value in the **Constant Value** field.
WI Class Prop	If you set **Form Param** to **Y**, place a value in either **Constant Value** or **WI Class Prop**, but not in both. To pass a different value to each invocation, specify the name of a work item class property in the **WI Class Prop** field.

5. After making your changes or additions, click **Update** or **Insert**, as appropriate.

Set how workflows process an invoice status

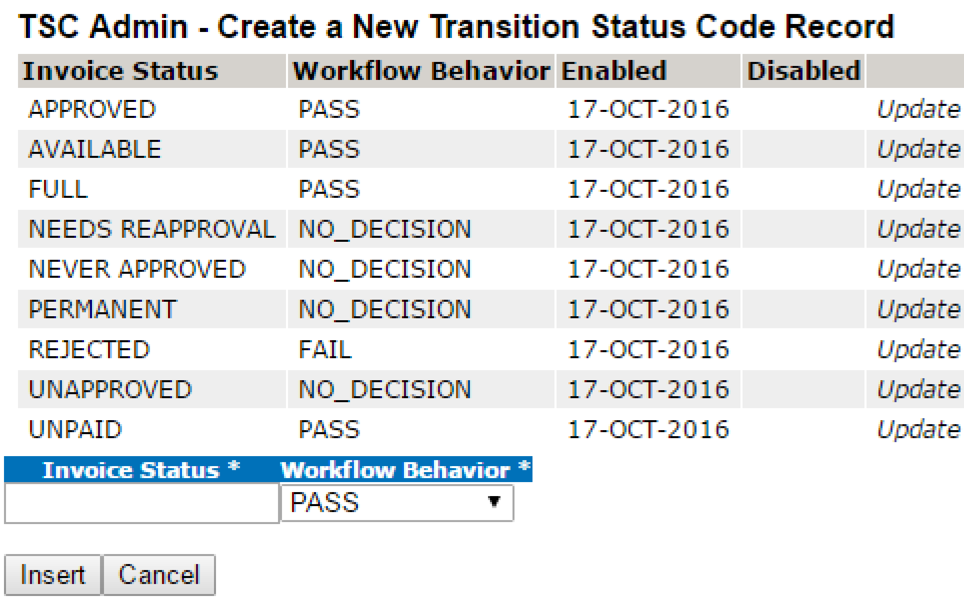
The Invoice Status Processing option defines and automates how the workflow handles certain invoice statuses.

Because the MarkView installer adds the required Oracle Applications invoice statuses with the appropriate workflow behavior, you should rarely need to use this menu. Contact Kofax Technical Support to guide you through this menu if all of the following conditions are true:

- Your company upgrades Oracle Applications.
- Your company does not upgrade the MarkView system.
- The new version of Oracle Applications contains new invoice status values.

If the preceding conditions are true:

1. Log in to MarkView and navigate to **Administration** > **Module Admin**.
2. Select the **Invoice Status Processing** tab.
3. Click **Insert**. The T**SC Admin - Create a New Transition Status Code Record** form opens.
4. Add new **Invoice Status** name and select the workflow behavior to activate.



TSC Admin - Create a New Transition Status Code Record

Invoice Status	Workflow Behavior	Enabled	Disabled	
APPROVED	PASS	17-OCT-2016		Update
AVAILABLE	PASS	17-OCT-2016		Update
FULL	PASS	17-OCT-2016		Update
NEEDS REAPPROVAL	NO_DECISION	17-OCT-2016		Update
NEVER APPROVED	NO_DECISION	17-OCT-2016		Update
PERMANENT	NO_DECISION	17-OCT-2016		Update
REJECTED	FAIL	17-OCT-2016		Update
UNAPPROVED	NO_DECISION	17-OCT-2016		Update
UNPAID	PASS	17-OCT-2016		Update

5. Click **Insert**. Usually, you need to add only one or two rows.
   The following table lists the values that the MarkView installer installs:

Invoice Status	Workflow Behavior
APPROVED	PASS
AVAILABLE	PASS
FULL	PASS
NEEDS REAPPROVAL	NO_DECISION
NEVER APPROVED	NO_DECISION
PERMANENT	NO_DECISION
REJECTED	FAIL
UNAPPROVED	NO_DECISION
UNPAID	PASS

Map responsibilities to user groups and roles

The Responsibility Group and Responsibility Role menus enable you to map Oracle Application responsibilities to MarkView user groups and roles.

- For the best results, use AUSS, which lets you set up automatic assignments. For information about AUSS, see Set up MarkView users with AUSS on page 28.
- For information about manually mapping responsibilities, see About MarkView users, user groups, and roles on page 136.

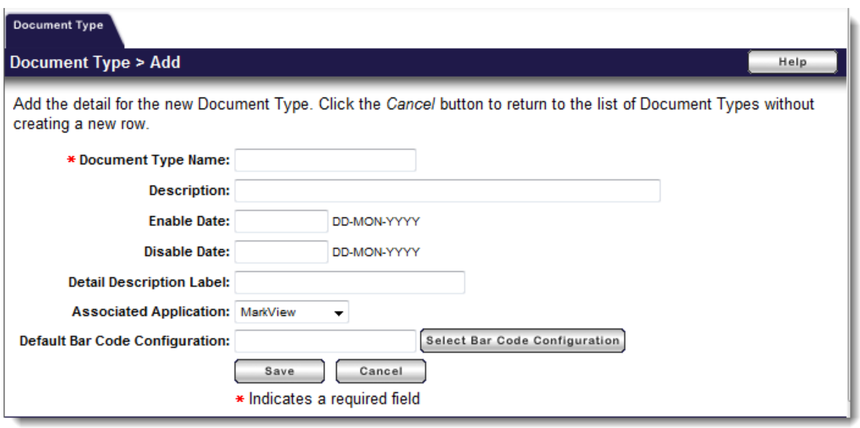
Manage document types

MarkView lets you create new document types. For example, you might need a document type that lets you provide a read-only view to a particular user group, or you might need a non-MarkView document type, for example, contracts, to save in MarkView Document Library.

Creating a document type for inclusion in a MarkView workflow requires the creation of a workflow infrastructure to support the new document type. Because creating a workflow infrastructure is not part of MarkView system administration, this guide contains no instructions for doing so.

Create document types

1. Log in to MarkView and navigate to **Administration** > **MarkView Admin**.
2. Select the **Document Types** tab and click **Add**.



3. Complete the page as follows.

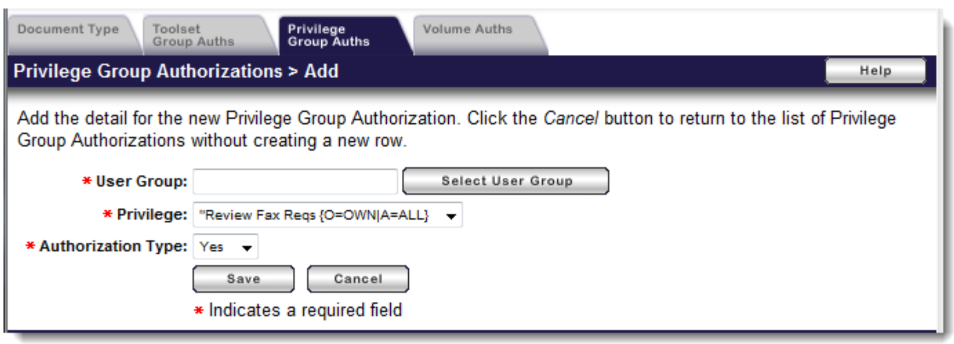
Field	Description
Document Type Name	Enter a unique name for the document type, for example, InsuranceClaimForms.
Description	Enter a description to identify the purpose of the document type, for example, "Needed for a MVDL implementation."
Enable Date	Enter a date to start the document type availability on a specific date.
Disable Date	Enter a date to stop the document type availability on a specific date.

Field	Description
Detail Description Label	Enter a short description to appear in the viewer when a user opens a document.
Associated Application	• MarkView: Specifies that the document type is related to MarkView processing. • Non-MarkView: Specifies that the document type is unrelated to MarkView processing.
Default Bar Code Configuration	Assigns a default bar code configuration to the document type. The bar code should be configured in MarkView before it appears for selection.

4. Click **Save**.
5. To make the document type accessible to users, add user group authorization as described in the following section.

Add user group authorization

1. Log in to MarkView and navigate to **Administration** > **Module Admin**.
2. Select the **Document Types** tab.
3. In the **Document Type** window, select the **Privilege Group Auths** tab.
4. Click **Add**.



5. Complete the page as follows.

Field	Description
User Groups	Select the User Group for whom to allow access.
Privilege	Select the type of access that the user has. For example, give the user access by selecting Access Document.

Field	Description
Authorization Type	Enter a date to start the document type availability on a specific date. Select an **Authorization Type** that matches the options available for the selected **Privilege**. Privileges with {Y|N} option: • Yes: Allows the user to use the privilege specified • No: Prevents the user from using the privilege Privileges with {OWN|ALL} option: • Own: Allows the user to exercise the privilege only on documents the user owns • All: Allows the user to exercise the privilege on all documents

6. Click **Save**.

Modify document types

1. Log in to MarkView and navigate to **Administration** > **Module Admin**.
2. Select the **Document Types** tab.
3. Locate the document type to modify and click the **Details** button next to the type name.
4. Make your changes and click **Save**.

Disable document types

For the best results, disable a document type by changing permissions instead of deleting the document type.

Although you can delete document types, doing so can disrupt audit-trail requirements for MarkView documents that completed processing. You also need to remove every transaction related to the document type before deleting the document type.

Disable an unused document type

If you create a document type and discover that you made a typographical error in the name, and no one has used the document type:

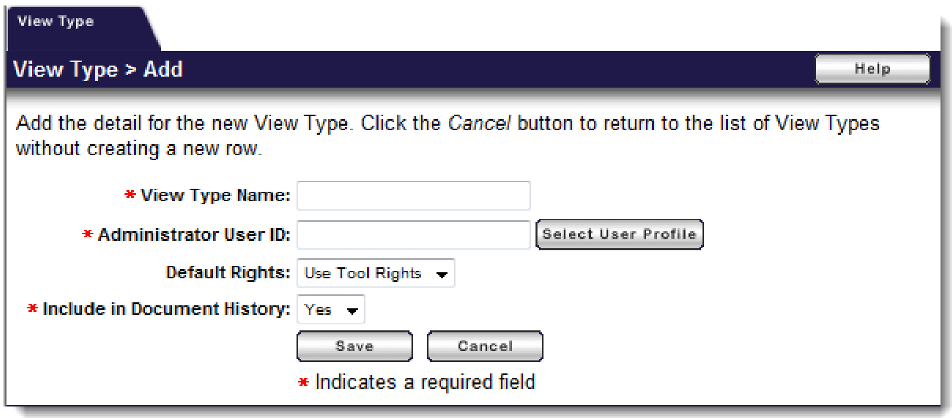
1. Log in to MarkView and navigate to **Administration** > **Module Admin**.
2. Select the **Document Types** tab.
3. Locate the **Document Type** name and click the **Details** button next to the name.
4. Click **Delete**.

Manage view types

View Types let you control the type of access that users have to a group of annotations on a document. When an administrator sets the Default Rights for a view type, all users accessing the view type inherit the security privileges specified.

Add view types

1. Log in to MarkView and navigate to **Administration** > **MarkView Admin**.
2. Select the **View Type** tab.
   The **View Type** page displays the view types already defined in MarkView. To modify an existing type, click the **Details** button next to the view type name.
3. Click **Add**.



4. Complete the page as follows.

Field	Description
View Type Name	Enter a unique name for the view type.
Administrator User ID	Enter the ID of the user who will administrator the view type. The administrator you select can change the default rights for the view type.
Default Rights	• Use Tool Rights: Use the default MarkView tool set. • Administrator: Lets users show, hide, move, edit, and delete tools that they create or place on a document. • Optional: Hides the tool by default. Lets the user show, but not move, edit, or delete the tool. • Default: Displays the tool by default. Lets the user hide, but not move, edit, or delete the tool. • Mandatory: Makes the tool always visible. The user cannot hide, move, edit, or delete it. • None: Hides the tool always. Does not let the user show, move, edit or delete the tool.

5. Click **Save**.

Modify view types

1. Log in to MarkView and navigate to **Administration** > **Module Admin**.
2. Select the **View Type** tab.
3. Locate the View Type to change and click the **Details** button next to the name.

4. Make your changes and click **Save**.

Delete view types

1. Log in to MarkView and navigate to **Administration** > **Module Admin**.
2. Select the **View Type** tab.
3. Locate the View Type to delete and click the **Details** button next to the name.
4. Click **Delete**.

Invoice deletion and cancellation

MarkView for Accounts Payable runs an automated process daily that moves work items associated with canceled or deleted invoices to the appropriate workflow queues.

You can manually initiate this process by executing the MVAP_utility.InvoiceSweep procedure.

Chapter 5

Prepare for mobile access

Use the following procedure as a guideline to set up your system to allow user access to MarkView Viewer through mobile devices.

1. Install and configure MarkView for Accounts Payable.
2. Contact your mobile device users and instruct them to do the following on their mobile browsers:
    a. Enable **Cookies**.
    b. Disable **Private Browsing**.

If your company uses reverse proxy for security purposes, you may need to perform additional mapping in the reverse proxy. For the mobile user to view document images, they need access to the MarkView document server.

If you mapped the proxy server on the MarkView server, you do not need to perform any additional setup.

(Optional) Information for adding a bookmark

Most users will follow a link in an email notification to access invoices in the mobile viewer. However, you might have users who want to add a bookmark to their mobile devices for easy access to their Web Inbox.

To allow users to create a bookmark, give them:

- The MarkView mobile-access URL, such as http://IP_address:port/mobile
- The host name, such as http://<host>:<port>/mobile

The URL or host name must access the MarkView application server. Access can be through wireless connection or through a VPN connected to the your network. The system setup must be able to accurately translate the server name to an IP address to allow access.

Giving users the mobile-access URL or host name is not required for mobile access. However, users need the mobile-access URL or host name to create bookmarks on their mobile devices.

Configure what appears on the mobile device

MarkView lets you control what appears when a mobile user accesses their Web Inbox or views an invoice in the viewer. Settings that you establish for viewing on a mobile device affect what appears on all mobile devices that access the system. However, the settings for mobile do not affect the settings that you establish for desktop access to the Web Inbox and viewer.

Use the following procedure as a guideline for configuring mobile devices. Details about using Module Admin appear throughout this guide, depending on what you are doing. For example, Configure MarkView menus on page 157 describes how to set the order in which items appear.

1. Log in to MarkView and navigate to **Administration** > **Module Admin**.
2. Continue as follows:
   - To configure what a mobile user sees in their Web Inbox, see Configure what appears in Web Inbox on page 95.
   - To configure what a mobile user sees when they view an invoices in the mobile viewer, see Configure what appears in MarkView Viewer.

Configure what appears in Web Inbox

By default, MarkView ships with a number of fields visible in Web Inbox, such as Invoice Number.

1. Log in to MarkView and navigate to **Administration** > **Module Admin**.
2. Select the **Display Type** tab.
3. Under **Name**, locate the option to make visible in the mobile Web Inbox, scroll to the **Query Page** column, and click **Show Query**.
4. Locate the line with the field name to appear, scroll to the far right, and click **Update**.
5. Under **Include in Mobile**, select Y to display the field, or select N to hide the field.
6. Under **Mobile Display Order**, enter a number to specify where in the order of fields the field will appear.
7. Click **Update**.
   When a user accesses the Web Inbox, the fields that you selected appear.

Configure what appears in MarkView Viewer

By default, MarkView ships with a number of fields associated with detail types visible when a user views an invoice in MarkView Viewer, such as the Supplier Name in the Invoice Details section.

1. Log in to MarkView and navigate to **Administration** > **Module Admin**.
2. Select the **Detail Type** tab.
3. Under **Detail Name**, locate the option to make visible in the mobile Web Inbox, scroll to the **Layout Page** column, and click **Show Layout**.
4. Locate the line with the field name to appear, scroll to the far right, and click **Update.**
5. Under **Layout Query**, click **Show Query**.
6. Locate the field name to appear, scroll to the far right, and click **Update**.
7. Under Include in Mobile, select Y to display the field or N to keep from displaying the field.
8. Under **Mobile Display Order**, enter a number to specify where in the order of fields the field will appear.
9. Click **Update**.

When a user views an invoice in MarkView Viewer, the field containing the information that you configured appears as part of the invoice details.

Chapter 6

Set up MarkView Viewer

This chapter describes the MarkView Viewer administration, which you control through MarkView preferences.

Minimum MarkView Viewer requirements

- Popup Blocking: Disabled.
- Compatibility View setting in Internet Explorer (if applicable): Disabled.

For the latest software requirements, see the *Kofax MarkView Technical Specifications* document on the Kofax MarkView Product Documentation site.

Configure the default MarkView Viewer layout

To enable a user to configure the MarkView Viewer layout, add them to the VIEWER ADMINISTRATOR user group in **Administration** > **MarkView Admin** > **User Groups**. The Settings Menu option becomes available in MarkView Viewer to the members of the VIEWER ADMINISTRATOR group.

Use layout settings to enable a user to load, save, delete, and configure the default layout on the user, group, or system levels.

About Accounting Details

When using MarkView Accounting Details, you associate configurations with a MarkView Organization. Some companies run multiple MarkView Accounting Details configurations, which are defined and created as part of their MarkView solution.

For example, a company might have:

- A US Organization that uses project distributions cost centers.
- A UK Organization that uses non-project (traditional general ledger) distributions.

Invoice processors would mark invoices associated with the US Organization with one MarkView Accounting Details configuration and invoices associated with the UK Organization with the other MarkView Accounting Details configuration.

If your MarkView solution has multiple Organizations that use the same MarkView Accounting Details configuration, associate each Organization with the same configuration.

For information about associating configurations with an Organization, see Map Accounting Details on page 70.

Configure the Email Document feature

The Email Document feature adds an Email button to the viewer. This feature lets an employee send an invoice PDF to another employee or external contact, like a supplier, to resolve questions. The invoice assignment remains with the employee sending the document.

For example, an employee looking at an invoice might want to double-check the invoice amount with the supplier. Using the Email Document feature, the employee can email the invoice PDF to the supplier without having the invoice reassigned to another employee.

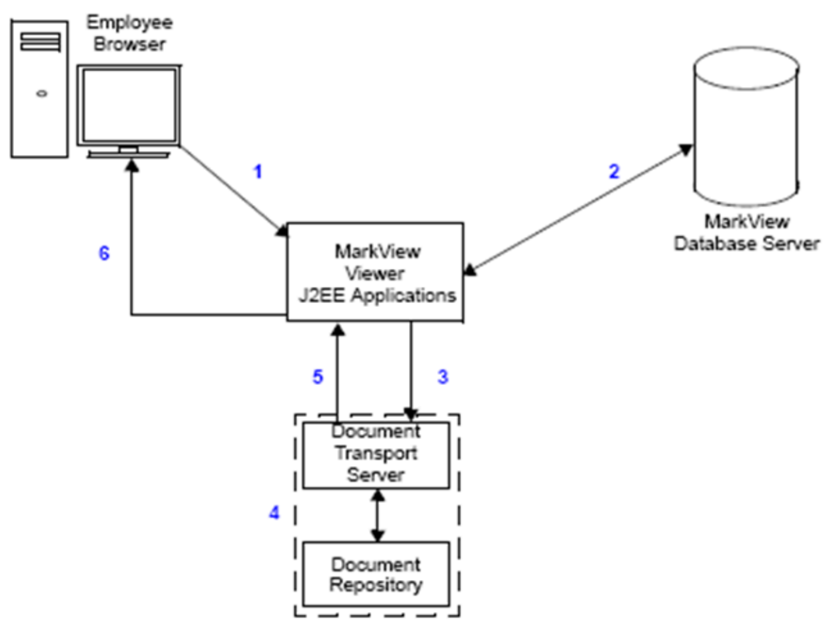
By default, this feature is enabled upon installation or upgrade. However, you set a default email address in the MarkView MVT_MAIL_FROM preference. MarkView uses the email address in the Mail From field if the sender has no assigned email address or if a server malfunction prevents including the identification of the sender.

Other preferences that let you customize the implementation include:

- VIEWER_INCLUDE_EMAIL: Set this preference to TRUE to include an email request button on the toolbar.
- VIEWER_INCLUDE_PDF_EXPORT: Set this preference to TRUE to let the user select the option to email a PDF attachment from the viewer.
- VIEWER_EMAILDOC_INTERNAL_DOMAINS: (Optional) Specify the domains of the internal contacts to whom an employee can send document links only.
- MVT_HISTORY_SHOW_EMAILDOC_HISTORY: Specify whether or not the email history of a document appears when viewing Document History.

Data flow

The data flow process involves exchanges between several components to display a document in MarkView Viewer. Numbers following the figure correspond to those in the figure.



MarkView Viewer Data Flow

1. An employee clicks an item in the Working Folder to view.
2. The viewer retrieves ERP data from the database, which includes the URL for the image.
3. The viewer calls the DTM to retrieve the image file from the Document Server. The DTM authenticates the user who initiated the request.
4. The DTM retrieves the image. The combination of volume path and workstation serial number determines the method used. For the best results, co-locate DTM and Document Server on the same host.
5. The DTM returns the image file to the viewer.
6. The viewer renders the image, combines it with the ERP data from Step 2, and presents it within the viewer.

Enable support for Java Web Start (JWS)

If Oracle E-Business Suite is configured to use Java Web Start to run Oracle Forms, every time the Oracle EBS user clicks Get Next to view a document, a MarkView Viewer instance with the image is opened in a new browser tab rather than in the existing one.

For more about the issue, refer to Oracle Support Note Doc ID 2386335.1: WEB.SHOW_DOCUMENT Target WindowName Does Not Work with JWS.

MarkView provides an interim solution for the issue.

If you integrate with Oracle E-Business Suite using Java Web Start to run Oracle Forms, follow these steps in the respective client browsers.

Microsoft Edge

Install the "Kofax MarkView Tab Control for JWS" extension.

1. To get the "Kofax MarkView Tab Control for JWS" extension from the Chrome Web Store, open the https://chromewebstore.google.com/detail/kofax-markview-tab-contro/ngbkomgeldbhhahmpnlldiaknnhmejop link in the Microsoft Edge browser.

   Do not switch to Chrome.
2. Get the extension.
3. Allow extensions from other stores.
4. Click **Add extension**.

   The extension is added to the Microsoft Edge browser.
5. Restart your browser.

Google Chrome

Install the "Kofax MarkView Tab Control for JWS" extension.

1. To get the "Kofax MarkView Tab Control for JWS" extension from the Chrome Web Store, open the https://chromewebstore.google.com/detail/kofax-markview-tab-contro/ngbkomgeldbhhahmpnlldiaknnhmejop link in the Google Chrome browser.
2. Click **Install**, and then click **Add extension**.

   The extension is added to the Google Chrome browser.
3. Restart your browser.

Mozilla Firefox

To install the "Kofax MarkView Tab Control for JWS" extension, download the FireFox_kofax_markview_tab_control_for_jws-1.0-fx.xpi file, open the Mozilla Firefox browser and, from the menu, select **Add-ons and themes**.

Option 1.

1. Open the Extensions menu and drag the downloaded file to the list of currently available extensions.
2. Click **Add** and, when prompted to activate the extension, restart your browser.

Option 2.

1. Click the gear icon and, from the menu, select **Install Add-on From File**.
2. Open the `FireFox_kofax_markview_tab_control_for_jws-1.0-fx.xpi` file.
3. Click **Add** and, when prompted to activate the extension, restart your browser.

Chapter 7

Set up Kofax Capture and Kofax Transformation Modules for MarkView

About Auto-Categorization

Auto-Categorization allows MarkView batch classes to bypass categorization in Kofax Capture to allow Kofax Transformation Modules to perform the categorization. Depending on the batch class property setting specified for RequireCategorizationInCapture, Kofax Capture handles batch classes as follows:

- 1 (ON): Prevents documents in the batch classes from moving out of Kofax Capture unless they are completely categorized.
- 0 (OFF): Allows documents in the batch classes to continue from Kofax Capture without being categorized.

If a document that has no categorization reaches Kofax Transformation Modules, Kofax Transformation Modules tries to categorize the document automatically based on extracted values.

Prerequisites:

- The Kofax Transformation Modules version is in compliance with the *Kofax MarkView Technical Specifications* document on the Kofax MarkView Product Documentation site.
- The Kofax Transformation Modules validation station is connected to the MarkView database.

Set the default document type for invoices without PO numbers

1. Start Kofax Transformation Modules Project Builder.
2. Open your MarkView Kofax Transformation Modules project and select **Script Variables**.
3. Near the bottom of the script variables table, locate **DefaultNonPODocumentType**.
4. Set the value to use as the default document type for invoices that enter the system without a PO number. Supported values include:
   - NON-PO INVOICE
   - PRE-APPROVED INVOICE

   By default, Kofax Transformation Modules uses NON-PO INVOICE, which you can override.
5. Click **OK**.
6. Save the project.

Set the RequireCategorizationInCapture property

The RequireCategorizationInCapture property specifies how Kofax Capture processes MarkView batch classes.

1. Open **Kofax Capture Administration**.
2. Right-click the **MarkView Invoice** or **MarkView Document** batch class and select **Properties**.
3. Select the **General** tab and look in the Batch Fields table to locate **RequireCategorizationInCapture**.
4. Set the Default setting to one of the following:
   - **1 (ON)** (default): Requires categorization.
   - **0 (OFF)**: Does not require categorization.

   > Batch class properties route documents from capture to MarkView. For a batch class that goes through Kofax Transformation Modules, the Kofax Transformation Modules extraction and validation process categorizes any documents in the batch class that are not categorized. For a batch class that does not go through Kofax Transformation Modules (for example, the MarkView Document batch class), any documents that are not categorized during capture must be manually categorized in the Uncategorized Documents workflow.
5. Click **OK**.
6. Save the batch class and proceed as follows:
   - For a MarkView Invoice batch class only, synchronize the batch class to the project and publish the batch class.
   - For a MarkView Document batch class, publish the batch class.

About the MarkView Workflow Agent

The MarkView Workflow Agent enables Kofax Capture to handle MarkView batches introduced through non-scan Kofax Capture products in the same way that Kofax Capture handles batches introduced through Kofax Scan.

Kofax Capture processes MarkView batches based on the batch class settings. For example, in a batch imported through Kofax Import Connector:

- If the Workflow Agent cannot communicate with MarkView, Kofax Capture routes the batch to the Quality Control queue.
- If AlwaysStopForReview specifies that all documents go to review, Kofax Capture routes all imported batches to the configured review queue.

Workflow Agent batch class properties

Two MarkView batch class properties define how Kofax Capture processes MarkView batch classes imported through an application other than Kofax Scan. These properties do not affect MarkView batch classes imported through Kofax Scan.

- AlwaysStopForReview: When enabled, routes every document in the batch to review in Kofax Capture, whether or not the documents have a valid bar code.
  - Disable (default): 0 (False)
  - Enable: 1 (True)
- ReviewQueue: Specifies the review queue to which Kofax Capture routes documents in the batch that need review.
  - Scan (default): Routes documents to the Scan queue
  - QC: Routes documents to the Quality Control queue

To change how Kofax Capture processes a MarkView batch imported through an application other than Kofax Scan, edit the batch class properties for the destination associated with the connection. Workflow Agent properties appear on the Batch fields tab.

> If you access the Document fields tab and change or add a value for the BarCode or Kofax.Separation.BarCodeValue fields, the Kofax.Separation.BarCodeValue always takes precedence.

See the Kofax Import Connector documentation for information about editing the destination.

Interaction between Kofax Capture and Workflow Agent batch class properties

The combination of batch class settings that you use determines how Kofax Capture processes non-scanned MarkView Invoice batch classes.

- If you set AlwaysStopForReview to 1 (ON), non-scanned documents always stop for review in the defined review queue.
- If you set AlwaysStopForReview to 0 (OFF) and RequireCategorizationInCapture to 1 (ON), non-scanned documents only stop for review if Kofax Capture cannot decode the bar code value.

> For MarkView batch classes imported through an application other than Kofax Scan, the RequireCategorizationInCapture property appears on the Batch Fields tab of the destination that handles the batch.

About Kofax Capture batch class templates

The following batch class templates are available when imported:

- MarkView Document: Used to separate documents that do not go through Kofax Transformation Modules.
- MarkView Invoice: Used to separate documents that go through Kofax Transformation Modules.

The batch class templates are set up with batch fields based on Kofax Capture Values, such as Batch Name, Batch ID, Batch Creation Date, Batch Creation Time, and Scan Operator.

Import the batch class templates

1. Log in to Kofax Capture as an administrator.
2. Select **Import**.
3. In the **Open** window, select <MarkView_KTM_project>\Markview.cab and click **Open**.
4. In the **Import/Export** window, click **OK** when the unpacking is completed.
5. In the **Import** window, click **Add All**.
6. Select **Save duplicates to new name**.
7. Click **Import**.
8. Follow the prompts to save the batch classes to a new name.
9. Click **OK** when the import is completed.

Prepare the batch class templates

1. Highlight the MarkView Document batch class.
2. Select **Properties**.
3. On the **Separation and Form Identification** tab, select **Custom**. In the list, select **MarkView Bar Code Separators** and click **Edit Profile**.
   The **Custom Separation and Form Identification Profiles** window opens.
4. Enter the following values:
   - Enable **Bar Code**.
   - In the list, select **MarkView Bar Code**.
   - Set **Found on stand-alone separator sheet** as follows:
     - To discard the bar code cover sheet after import, select this option.
     - To keep the bar code cover sheet with imported documents, deselect this option.
   - In the **Search Text** field, enter:
     ^(CP|DT)ID-
   - Enable **Treat search as regular expression**.
5. Click **Save** and **Close**.
6. Click **Apply**.
7. Select the MarkView Invoice batch class and repeat steps 2 through 6.

Prepare Kofax Import Connector to use MarkView Bar Code separators

1. From Kofax Capture Administration, highlight the MarkView Document batch class.
2. Expand the batch class to import through Kofax Import Connector until you see Sample Page 1 with a bar code.
3. Right-click **Page Level Bar Codes** and select **Properties**.
4. On the **Available Fields** pane, select **BarCode**, click **Add**, and click **Apply** to add the Bar Code index field.
5. Highlight the MarkView Document batch class.
6. Select **Properties**.
7. On the **Separation and Form Identification** tab, select **Custom**. In the list, select **MarkView Bar Code Separators12** and click **Edit Profile**.

   The **Custom Separation and Form Identification Profiles** window opens.
8. Enter the following values:
   - Enable **Bar Code**.
   - In the list, select **MarkView Bar Code12**.
   - Set **Found on stand-alone separator sheet** as follows:
     - To discard the bar code cover sheet after import, select this option.
     - To keep the bar code cover sheet with imported documents, deselect this option.
   - In the **Search Text** field, enter:

     ^(CP|DT)ID-
   - Enable **Treat search as regular expression**.
9. Click **Save** and **Close**.
10. Click **Apply**.
11. Select the MarkView Invoice batch class and repeat steps 2 through 10.

Enable invoice lines export from Kofax Capture

The **AfterExtractDeleteLineItems** variable specifies how Non-PO and Pre-approved invoice lines get exported from Kofax Capture to Oracle. By default invoices are exported without lines.

To enable Non-PO and Pre-approved invoice lines export you need to perform the following steps:

1. Start Kofax Transformation Modules Project Builder.
2. Open your MarkView Kofax Transformation Modules project and select **Script Variables**.
3. In the variables table, locate **AfterExtractDeleteLineItems**.
4. Set the value to FALSE to enable export of invoice line items.
5. Save the project.
6. Re-sync the batch class and republish it, then try again with a new batch.

Troubleshooting Kofax Transformation Modules

MarkView Kofax Transformation Modules project performance issues

Document processing through Kofax Transformation Modules may be time-consuming if the number of purchase order open lines exceeds 1,000. To improve performance, we recommend that you disable the purchase order discovery option in the LIM locator.

1. Start Kofax Transformation Modules Project Builder.
2. Open your MarkView Kofax Transformation Modules project.
3. In the Project Tree panel, navigate to **Project** > **Project Class** > **Invoice** > **Locators**.
4. Locate and double-click the LIM locator.
5. On the **Settings** tab, in the **Purchase Order** section, clear the **"Execute purchase order discovery"** check box.

   By default, the **"Execute purchase order discovery"** check box is selected.
6. Click **Close**.
7. Save the project.
8. Resynchronize your project and republish the corresponding batch class.

Chapter 8

Configure MarkView for Expense Management

MarkView for Expense Management integrates with Oracle Internet Expenses, giving you online access to your receipts. Using a MarkView Process workflow, a manager can review, audit, and approve employee expenses. All receipts are stored within Oracle and viewable with MarkView Viewer.

Enable and disable Expense Management

If your company purchases MarkView for Expense Management, the installation process enables the application system-wide by default. However, MarkView lets you enable and disable the application by organization.

For example, your company might decide to pilot an expense management process in the U.S. organization before rolling it out to your European organization. Using MarkView Organization Setup, you can disable Expense Management for the European organization and keep the application enabled for the U.S. organization. Once the pilot program proves successful, you can return to Organization setup and enable MarkView Expense Management for the European organization.

1. Log in to MarkView and navigate to **Administration** > **Module Admin**.
2. Select the **Organizations** tab.
   The Org Admin page opens.
3. Locate the organization to configure and click **Configuration**.
   The Preferences page for the organization opens.
4. Click **Update** to make preference options available.
5. Locate the question **Expenses: Is MarkView Expense enabled?**.
6. Select the setting to use:
   - **Yes**: Enables expense management.
   - **No**: Disables expense management.
7. Click **Update**.

Provide submission instructions

MarkView stores four lines of default submission instructions that appear as messages when an employee submits an expense report. MarkView saves the default lines in 4 message repositories, SUBMIT_INSTRUCTION_DEFAULT_LINE_XX (01 to 04). You can override the default message lines, but you cannot modify or delete them.

By default, the confirmation page contains the following instructions:

```
If there are any receipts associated with this expense
    report tape them to standard sheets of paper.
```

```
Print this cover page from your browser and place it on
    top of the receipt packet.
```

```
Your manager (or specified approver) will be notified
    requesting approval for this expense report.
```

If you localize text for custom messages, MarkView uses only the custom messages. For example, if you create 2 custom lines of localized instructions, SUBMIT_INSTRUCTION_LINE_01 and SUBMIT_INSTRUCTION_LINE_02, MarkView only displays the 2 lines. MarkView does not display any of the default lines.

Add invoice submission instructions

1. Log in to MarkView and navigate to **Administration** > **MarkView Admin**.
2. Select the **Messages** tab.
3. Locate the **SUBMIT_INSTRUCTION_LINE_XX (01 to 03)** message and click **Details**.
4. Select the **Message Text Translations** tab and click **Add**.
5. Select the language to use, for example, select "American" for American English.
6. In the **Text Translation** box, enter the text of the message.
7. Click **Save**.

Send receipt reminders to employees

When an employee submits an expense report that requires receipts, but does not submit receipts, the system sends an Oracle Notification to remind the employee. Configure the number of reminders and the frequency with which they are sent through the MarkView preference MVEXP_RECEIPTS_REMINDER_XX, where XX is a number from 01 to 99 that indicates the number of reminders to send. The value for the preference is the number of hours before the reminder is sent. For example:

Preference Name	Value
MVEXP_RECEIPTS_REMINDER_01	4
MVEXP_RECEIPTS_REMINDER_02	24
MVEXP_RECEIPTS_REMINDER_03	48

In this example:

- If no receipts are received for the expense report, the system sends a reminder to the preparer after 4 hours.
- If no receipts are received after 24 hours, the system sends a second reminder.
- If no receipts are received after 48 hours, the system sends a third reminder.

To send more reminders, add more preferences.

Set up receipt requirements

Using preferences, you can configure MarkView to make an expense report available for processing without the required receipts. Or, configure MarkView to put an expense report on hold until the employee submits receipts.

For information about setting preferences, see Change preference settings on page 198.

The following preferences control MarkView Expense Management behavior in a non-customized Oracle iExpense workflow.

- MVEXP_RECEIPTS_REQUIRED_FOR_AP_ONLY: Controls whether MarkView makes an expense report available for manager approval before the employee attaches receipts to the report.
  - Y: MarkView makes the expense report available for manager approval without the required receipts attached.
  - N (default): MarkView puts the expense report on hold and thereby prevents the manager from seeing the report until the employee attaches the required receipts.
- MVEXP_SKIP_LINES_WITH_MISSING_RECEIPTS: When determining if an expense report requires receipts, specifies whether MarkView skips lines requiring receipts if the employee enabled the Receipt Missing check box next to those lines in Oracle iExpense.
  - Y: MarkView notifies the manager that an expense report needs approval if an employee who is missing receipts enables the Receipts Missing check box. MarkView does not require the employee to submit the missing receipts.
  - N: MarkView does not notify the manager that an expense report needs approval if an employee who is missing receipts enables the Receipts Missing check box. MarkView requires the employee to submit the missing receipts or supporting documentation first.

    For example, an employee's company configured Oracle iExpense to require receipts for expenses that exceed $25.

    - If the employee's expense report does not contain any lines above $25, MarkView routes the expense report directly to the manager for approval.
    - If the expense report contains one or more lines that exceed the $25 limit, MarkView does not route the expense report to the manager, regardless of the status of Receipts Missing check box. MarkView requires the employee to submit receipts or supporting documentation first.

Chapter 9

Set up MarkView Document Library

MarkView Document Library lets an employee store different types of non-MarkView documents and related metadata in a central repository. MarkView Document Library provides permissions-based retrieval of documents stored in the library.

Paper documents must be converted to electronic documents. Once converted, employees can upload documents from their desktop.

Non-MarkView documents are stored in their native file format. For example, an employee can store PDF files, spreadsheet files, and other document types in Document Library.

An employee must belong to the right role and user group to add or retrieve documents from Document Library.

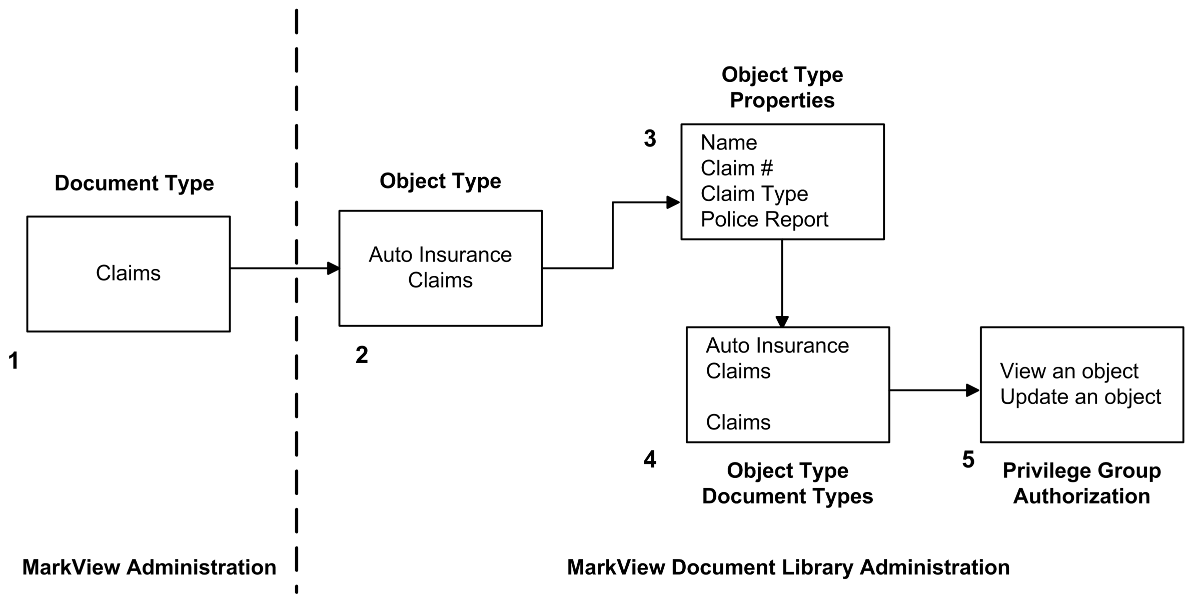
To set up the library for basic use, the MarkView Administrator:

- Creates Document Types to use in MarkView Document Library.
- Creates Object Types that provide a framework with which to associate document types.
- Creates Object Properties to facilitate indexing and searching the library.
- Associates Document Types with Object Types.
- Gives MarkView User Groups authorization to access Object Types and Document Types.
- Assigns users to the user group that will have access to MarkView Document Library.

Object types, document types, and privileges are interrelated to facilitate easy storage and access.

Scenario

Your company recently acquired an insurance firm and you need to set up Document Library to track auto insurance claims.



1. The document type helps you categorize the paperwork that you expect to receive. For example, Claims can be assigned to insurance claims forms.
2. The object type, Auto Insurance Claims, acts as the container for all auto insurance claims. You could have another object type for Home Insurance Claims.
3. Through Object Type properties, you define the type of information that you need to store in Document Library for the Object Type. This example shows a company that is storing Claims documents, therefore, "Claim # " is one of the properties defined.

   The properties defined help those using Document Library quickly locate the needed documents. To see object properties, a Document Library user does not need to open the document itself.
4. To create a link between them, you associate the object type with the document type.
5. Lastly, you specify which MarkView User Groups can access the object type and specify what actions members of the group can take.

If you have other documents, like reports and legal paperwork, to associate with claims, you create a document type for each. When you create the related Object Type, include properties that match some those of the Claims object type, for example, "Claim # ". The Document Library user can then enter the claim number and search by the property value for all documentation related to that claim number.

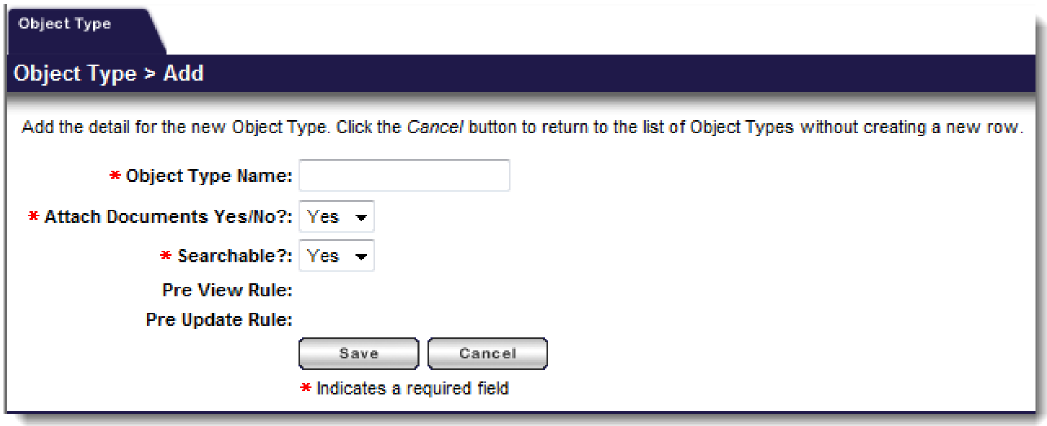
Create object types

When you create an object type, the object type inherits a set of standard properties, which include:

- CREATION_TIMESTAMP (Creation Timestamp)
- FILENAME (Filename)
- IS_DELETED (Is Document Deleted?)

- NAME (Name)
- OBJECT ID (Unique ID)
- ORIGINATOR (Owner)

1. Log in to MarkView and navigate to **Document Library** > **Admin**.
2. Select the **Objects Types** tab and click **Add**.



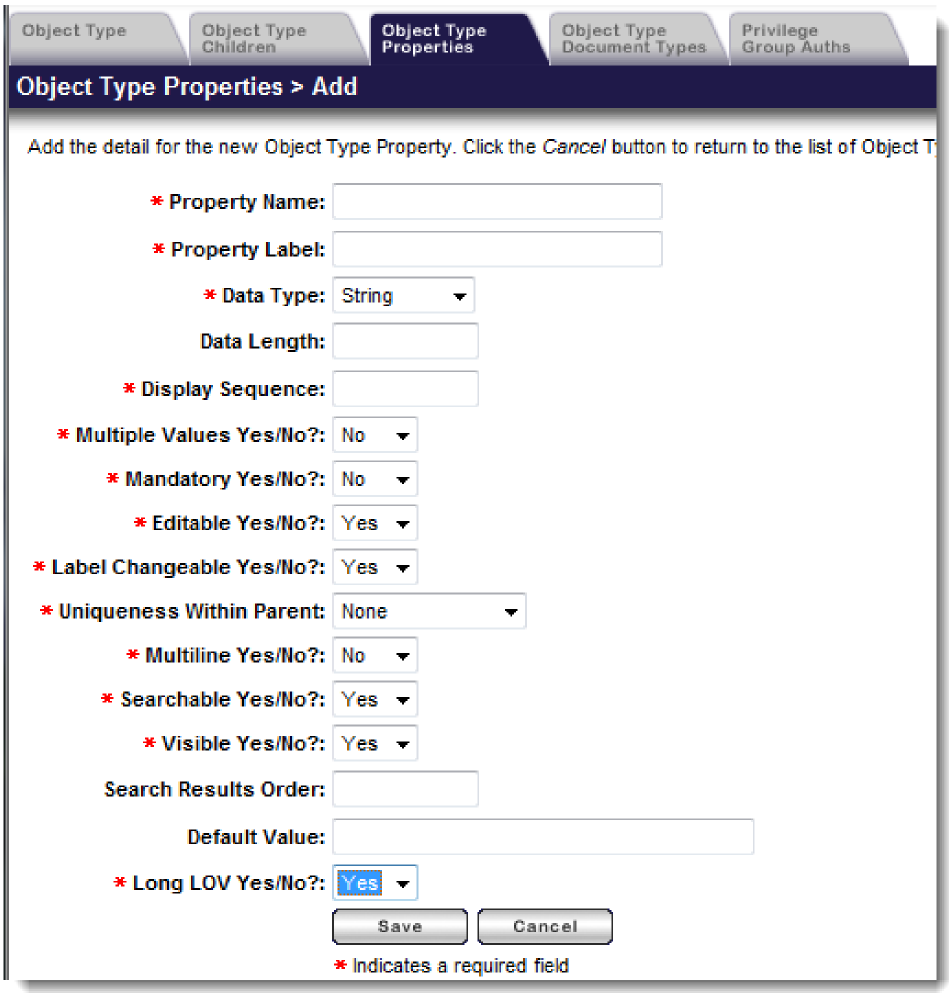
3. Complete the form as follows.

Field	Description
Object Type Name	Enter a unique name for the object type.
Attach Documents Yes/No?	Specify whether a user can attach documents to the Object Type.
Searchable	Specify whether a user can search on the content of this field.
Pre View Rule	Not used
Pre Update Rule	Not used

4. Click **Save**.
   MarkView displays a message stating that the Object Type was saved.
5. Click **List** to return to the Object Type page and continue to step 3 in Add object type properties to add properties.

Add object type properties

1. Log in to MarkView and navigate to **Document Library** > **Admin**.
2. Select the **Object Type** tab.
3. Locate the Object Type for which to add properties and click **Details**.
4. Select the **Object Type Properties** tab and click **Add**.



5. Complete the page as follows.

Field	Description
Property Name	Enter a unique name for the property. This name appears in uppercase, regardless of what you enter. For example, "Claim_Number" appears as CLAIM_NUMBER. Property Names cannot contain spaces.
Property Label	Enter text to appear as the field name for the property. This text appears in the case that you use. For example, "Insurance Claim" appears as" Insurance Claim."

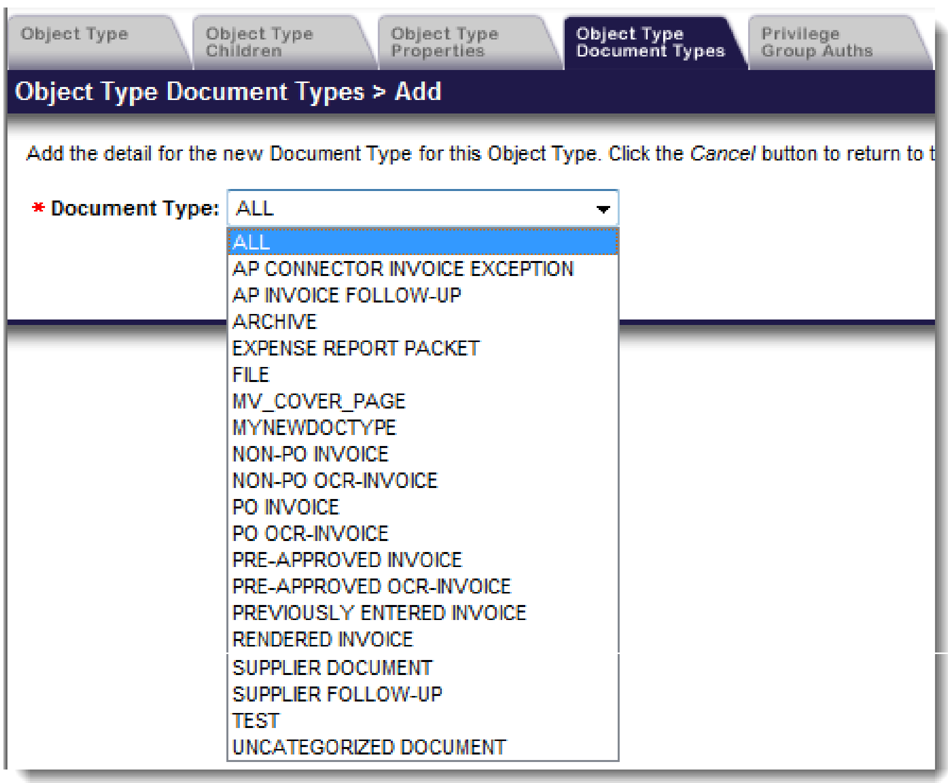
Field	Description
Data Type	Identify the data type that the property will accept: • String: Accepts a string of alphanumeric characters • Date: Accepts a date • Number: Accepts digits • Timestamp: Accepts a timestamp
Data Length	Specify how many characters the field accepts.
Display Sequence	Specify where in the sequence this property appears in relation to other properties.
Multiple Values	• Yes: Allows the user to enter multiple values for the property • No: Prohibits the entry of multiple values
Mandatory	• Yes: Makes the property a required value • No: Makes the property optional
Editable	• Yes: Allows the user to enter and change property content • No: Prevents the user from changing the value
Label Changeable	• Yes: Allows the user to change the label name • No: Does not allow the user to change the label name
Uniqueness Within Parent	Specify if values for this property must be unique across all objects of the same type. If you require a unique value, specify whether the system will consider case when determining the uniqueness of the value. • None • Case Sensitive • Case Insensitive
Multiline	• Yes: Allows the entry to be more than one line • No: Does not allow the entry to be more than one line
Searchable	• Yes: Allows the user to search the Object Type • No: Does not allow the user to search the Object Type
Visible	• Yes: Shows the Object property • No: Does not show the Object property
Search Results Order	Specify whether this property value is used when putting search results in order. For example, the **Claim Date** property has a Search Results Order of 1 and **Claim Number** has a Search Results Order of 2. After a search, MarkView shows the **Claim Date** first and the **Claim Number** second.
Default Value	Displays the default value of the property.
Long LOV	Allows the list of values to respond to query. Requires customization.

6. Click **Save**.
7. To associate document types with the object type, continue to step 4 in the next section.

Associate an object type and a document type

You can only associate an existing document type with an object type. To create a document type, see Create document types on page 89.

1. Log in to MarkView and navigate to **Document Library** > **Admin**.
2. Select the **Object Type** tab and locate the **Object Type** with which to associate a document type.
3. Click **Details**.
4. Select the **Object Type Document Types** tab and click **Add**.



5. In the **Document Type** list, select the document type to associate with the Object Type and click **Save**.

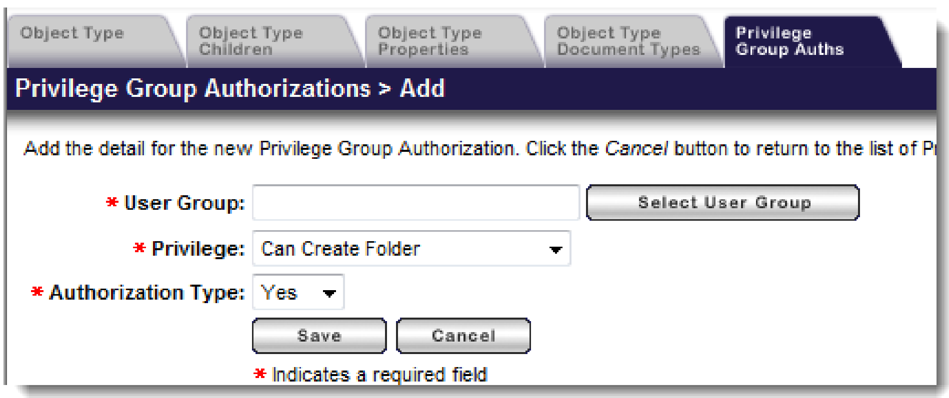
   The list displays document types that are defined in MarkView.

   You can associate more than one document type with an Object Type.
6. To authorize user groups to access the object type, continue to step 4 in Add object type privileges.

Add object type privileges

Users who are members of the ARCHIVE user group can create and modify documents throughout the library, assign users to the ARCHIVE user group, and grant permission to create top-level documents.

1. Log in to MarkView and navigate to **Document Library** > **Admin**.
2. Select the **Object Type** tab and locate the Object Type to which to add privileges.
3. Click **Details**.
4. Select the **Privilege Group Auths** tab and click **Add**.



5. Complete the form as follows.

Field	Description
User Group	Select the MarkView User Group to allow access to the Object Type.

Field	Description
Privilege	Select the type of action that the user can perform on this Object Type. • Can Create Folder • Can Delete Object • Can Delete Object's Children • Can File into Obj Children • Can File into Object • Can Freeze Object • Can Freeze Object's Children • Can Refile Object • Can Refile Object's Children • Can Transfer Object • Can Transfer Object's Children • Can Update Object • Can Update Object's Children • Can View Object • Can View Object's Children • Create Folder Object's Child • Is Vital Record • MVRM Edit Metadata Logic • Rest View Obj Objects' Child • Restrict View Object
Authorization Type	Select whether to allow privileges to members of the user group. • Yes: Allows the user to use the privilege specified • No: Prevents the user from using the privilege • Own: Allows the user to exercise the privilege only on documents the user owns • All: Allows the user to exercise the privilege on all documents

6. Click **Save**.

Add search fields

You can add custom fields to the Document Library Search page to enhance the search capability for users. You associate the custom search field with an object property. By default, Document Library examines all object types for a matching property.

Limit the number of custom search fields that you add to three (3). Adding more than three custom fields can degrade system performance.

When you add a search field, you link the field to an object property. The search returns results from every object type, or class, that contains the named property.

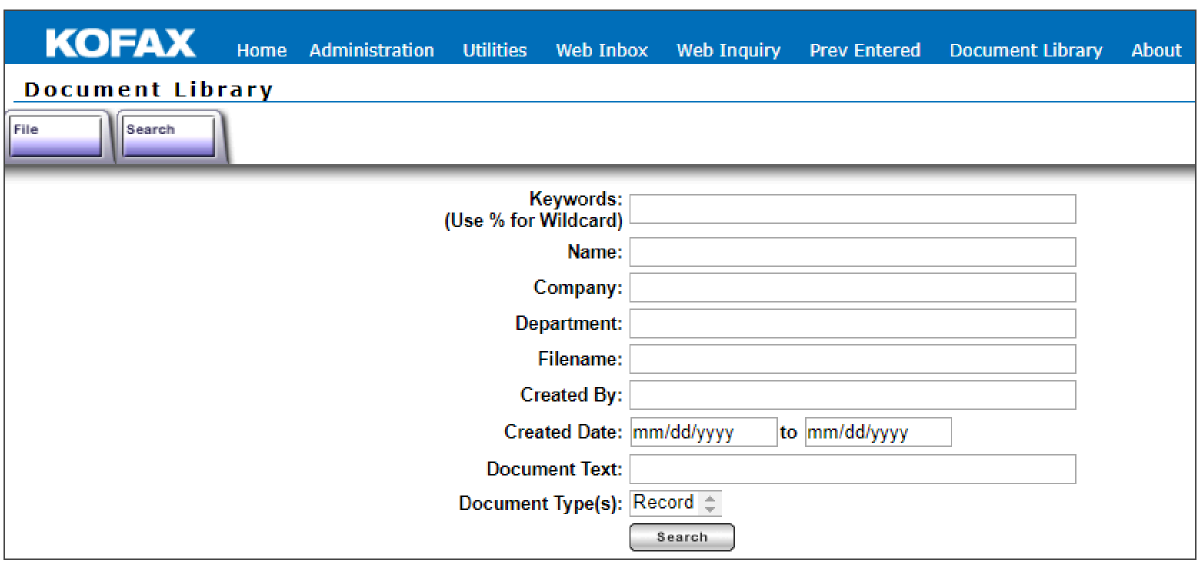
Setting the ADMIN_ACCESS_MVRM_SEARCH preference to ALL enables custom search field administration. For more information, see MarkView Document Library preferences on page 240.

1. Log in to MarkView and navigate to **Document Library** > **Admin**.
2. Select the **Search Fields** tab.
3. Click **Add** to open a new search field page.
4. Click **Select Property** to open a list from which to select a Property Name.

   The LOV, Active Object Types, includes a column that shows how many object types contain a property of the same name. Click the selection button next to the property. Doing so returns you to the add page.
5. Enter a Property Label in the text box provided. This label appears on the search page.
6. Enter the Display Order as an integer in the text box provided. This number indicates where this custom field appears on the search page relative to other custom fields.
7. Click **Save**.

   By default, custom search fields appear between the Name and the Filename fields on the search page.

   The following example shows two custom fields, Company and Department, added to the search page.



If you change the property name in the object type, manually update the custom search field entry to reflect the change. It is necessary to do because there is no direct tie between the search field property name and the object types where the properties exist.

Exclude an object type from the search

Custom search fields are joined with the other fixed search fields on the page so that all criteria must be satisfied to return a match (Boolean AND).

1. Log in to MarkView and navigate to **Document Library** > **Admin**.
2. Select the **Object Types** tab.

3. In the object types list, click **Details** next to the object type to exclude.
4. In the **Searchable** list on the Edit page, select **No**.
5. Click **Save**.

Create object type children

Through the Object Type Properties subtab, you can link other object types as children to an object type. The child object type inherits the properties of the parent.

Upload documents

A user creates library documents by uploading a document into the library. Once a document is uploaded, it becomes a library document, consisting of the document itself and the document metadata.

The following documents reside in MarkView Document Library:

- System Document: The top document in Document Library, the System Document, provides search capability that starts at a single point. Users cannot see the System Document nor can you assign privileges at this level. The System Document is required. Do not edit or delete this document.
- Documents: Documents make up MarkView Document Library. Users can search for and retrieve documents and their metadata.
- Filed Documents: A document is filed once all of its mandatory property values are specified and it is placed in the library. When a document has been filed, it leaves the unfiled documents queue, and appears in Document Library.
- Non-Electronic Documents: MarkView treats non-electronic documents in the same manner as other documents. The only difference is that there is no electronic image associated with the document. Instead, MarkView Document Library stores a description of the physical location of the document, as well as the document metadata. A user can attach an electronic image later.

Chapter 10

Monitor queues with Process Monitor

MarkView Process Monitor lets you view real-time information about queues and work items within queues. You can monitor queues across multiple workflows and monitor multiple work item classes within multiple queues. With Process Monitor, you can:

- Monitor all of the queues that comprise a workflow.
- Determine how many work items are currently in each queue.
- Identify which work items are in a queue.
- View work item history and properties, and, with the correct authorization, view the document image in MarkView Viewer.

Process Monitor lets you view a subset of work items in the queue. For example, using filters, you can identify high-value invoices, high-priority contracts, or purchase orders from an organization.

This chapter describes how to create MarkView Process Monitor configurations to monitor selected workflows and queues, and how to change your view of what appears in the process monitor.

> Accessing MarkView Process Monitor requires that you log in using MarkView credentials. To change the log-in method to single sign-on, see the *MarkView Installation Guide*.

Work with monitor views

The MarkView Process Monitor interface consists of a toolbar and a display area. The makeup of the toolbar and the contents of the display area change, based on the activity you initiate. The display area can contain the following:

- Bar graph (queue-level display)
- List of work items (queue-item display)
- Work item details (history and properties)
- Preferences and configuration windows

Work with configurations

MarkView Process Monitor includes prepackaged configurations that you can use as is, edit for a single use, or use as a template to create additional configurations. The MarkView Process Monitor stores configurations in the database where they are available from any client computer.

You can monitor any number of workflows, any number of queues in the workflow, and any number of work item classes. However, you can only monitor workflows, queues, and work item classes that already exist in MarkView.

Scenario

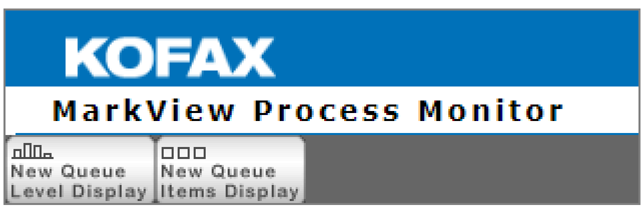
The AP Manager uses Process Monitor to check the work assignments within the AP group. The manager looks at the PO invoice entry queue and sees that the queue contains a backup of pending items, including a large number of invoices for one particular organization. The manager takes corrective action by assigning AP processors to work on the invoices for that organization.

While using Process Monitor, the AP Manager looks to see if Business Users are actually taking action on invoices that were forwarded to them for processing (for example, for approval, coding, comment). By checking queues that contain work items for the business users to process, the Manager can determine if their queues contain old invoices that need immediate attention.

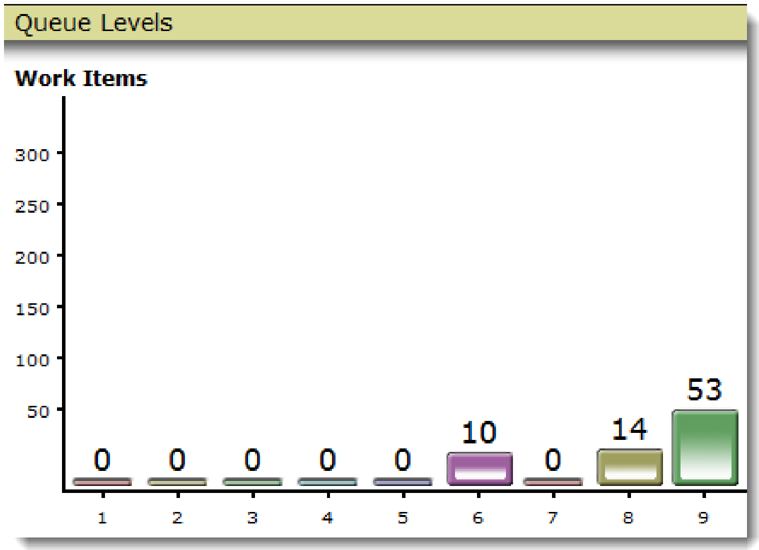
Use Process Monitor to look at the Workflow Admin queue to ensure that no invoices or documents are stopped due to errors and require your attention.

Create a configuration

1. Log in to MarkView and navigate to **Utilities** > **Process Monitor**.



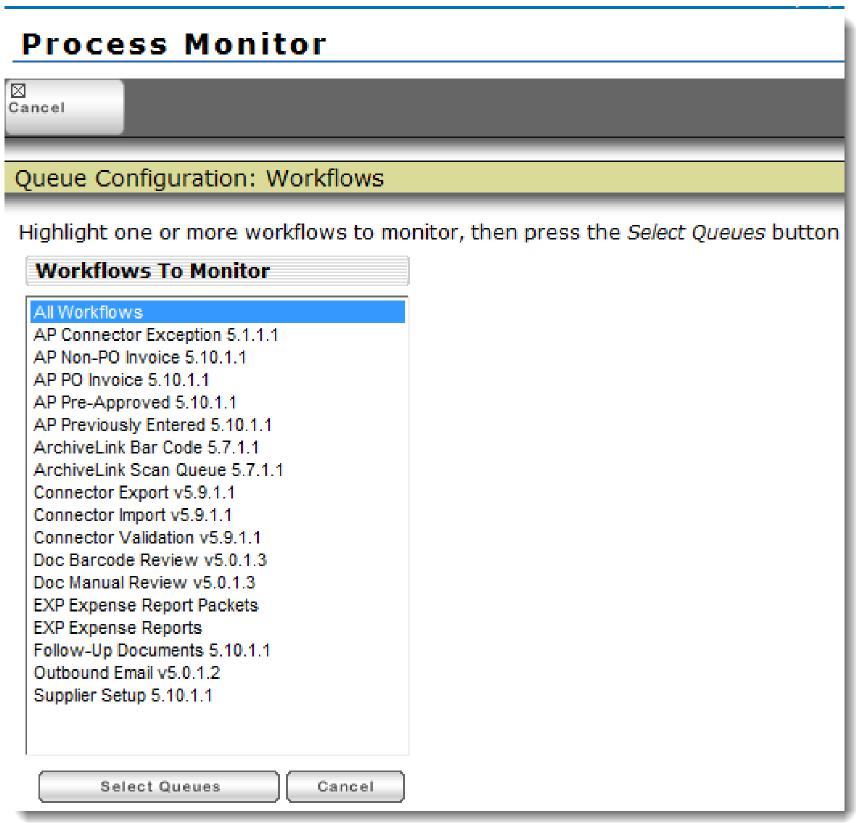
2. On the toolbar, click one of the following New Queue buttons.
    - **New Queue Level Display**: Creates a view that displays a bar graph of aggregate data (one bar for all of the work items in each queue).



- **New Queue Items Display**: Creates a list of work items, showing the current queue where the work item is located, and providing links to access more work item details.

			Description	Date Received	From	Priority	Retrieved By	Type
			Copy Document: Document ID 110	03/31/2011 09:32 AM	Original Documents	20		Uncategorized Document
			Fax from: {ATTR1}, Faxed to: MARKVIEW_FAX on Fax Line 1 at February 11, 2011 18:39:49	03/31/2011 09:32 AM	Original Documents	20		Uncategorized Document
			Copy Document: Document ID 112	03/31/2011 09:32 AM	Original Documents	20		Uncategorized Document
			Copy Document: Document ID 113	03/31/2011 09:32 AM	Original Documents	20		Uncategorized Document

3. Navigate to **Queue Configuration** > **Workflows** and select the workflow to monitor. By default, MarkView monitors all workflows.



Ctrl-click or Shift-click to select multiple workflows.

4. Click **Select Queues**.
5. Navigate to **Queue Configuration > Queues & Work Item Classes** .
   a. On the left-hand pane, select at least one queue to monitor. You can monitor multiple queues.

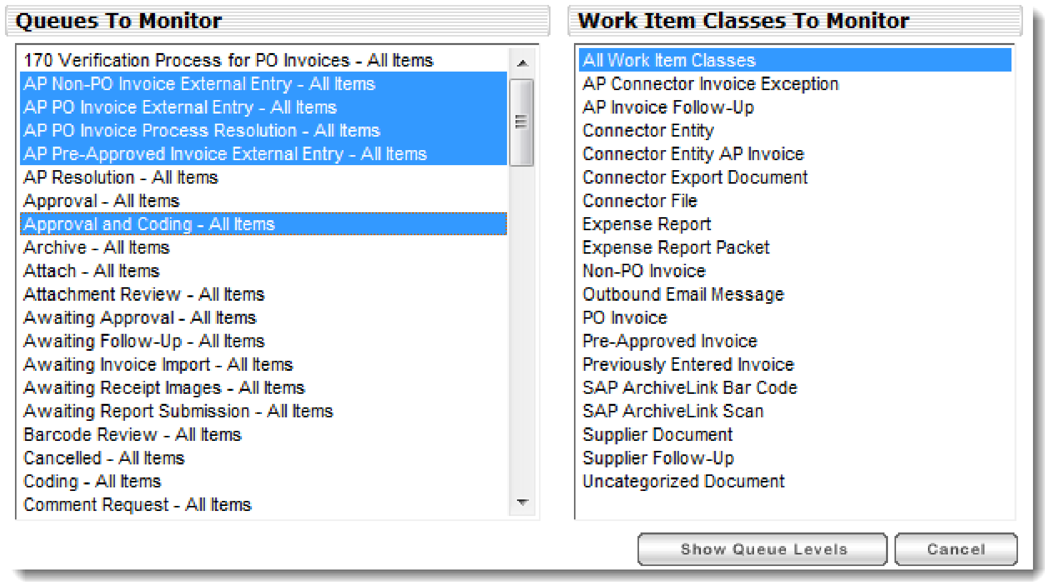
      Only those queues used by the workflows you selected on the workflows page appear in the panel.

      To change the workflow selection, click **Select Workflows**.

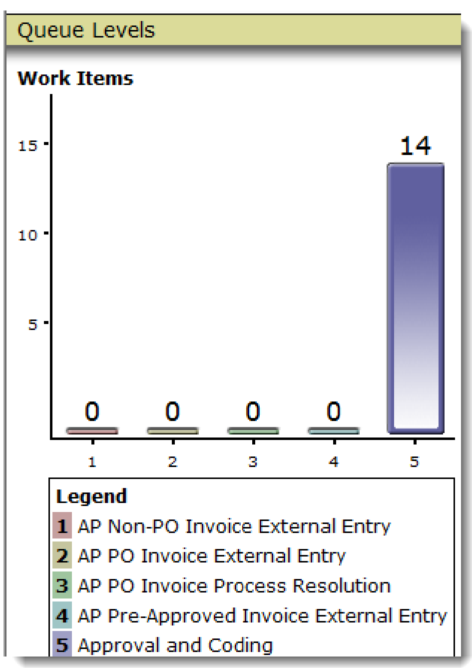
      In the list, the queue name appears to the left of the hyphen and the queue filter to the right. The default filter, All Items, includes all available items in the queue. If you configured Sub Types, additional queues will be available by Sub Type and Organization.

      For example, in the entry **Non-PO Invoice Entry - All Items**, "Non-PO Invoice Entry" is the queue name, and "All Items" is the work item class for that queue.
   b. On the right-hand pane, select the work item classes to monitor.

      A workflow can have more than one authorized work item class, which enables you to monitor a subset of classes across the set of queues. By default, MarkView monitors all work item classes.

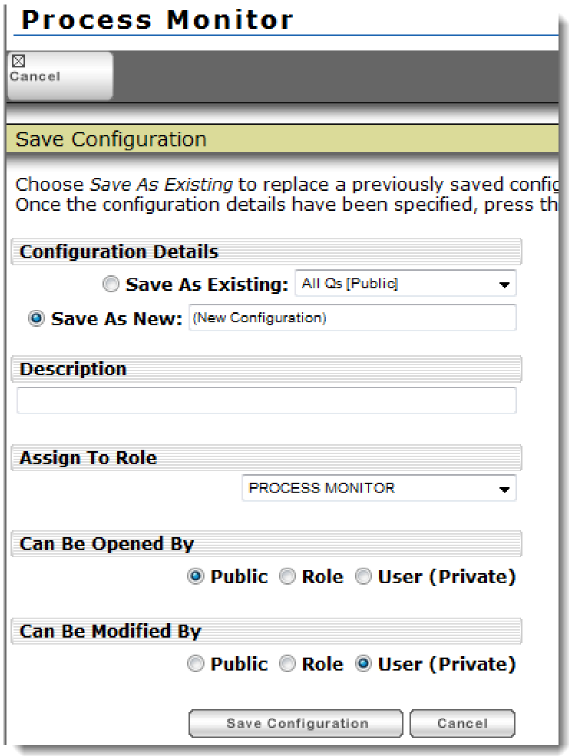


6. When you finish, click **Show Queue Levels** or **Show Queue Items**. (The button available depends on the type of display you selected.)



To change the queues and work item classes being monitored on the bar graph page, click the name or number on the horizontal axis of the graph, or click the queue label in the Legend.

7. Click **Save Configuration**.
A Configuration Details page opens.



8. Complete the Configuration Details page with the following information.

Setting	Description
Save As Existing	Select to overwrite or modify a configuration.
Save As New	Select and enter a name to save the configuration as a new configuration.
Description	Enter text that helps identify the purpose of the configuration.
Assign to Role	In the list, select a role that has authorization to open or modify the configuration. The following fields establish the authorization parameters.
Can Be Opened By	Select who can open the configuration: • Public: Any MarkView Process Monitor user • Role: Any user assigned to the role selected in the Assign To Role field • User (Private): Only the user who created the configuration
Can Be Modified By	Select who can modify the configuration: • Public: Any MarkView Process Monitor user • Role: Any user assigned to the role selected in the Assign To Role field • User (Private): Only the user who created the configuration You cannot allow someone to modify the configuration without first granting them authorization to open the configuration.

9. Click **Save Configuration**.

Edit a configuration

1. Log in to MarkView and navigate to **Utilities** > **Process Monitor**.
2. Select the configuration to edit and click **Open Configuration**.
3. Edit the configuration criteria.
4. Click **Save Configuration**.
   - Create a new configuration by selecting **Save as New** and entering a new name.
   - Modify the configuration you opened by selecting **Save as Existing**.
5. Click **Save Configuration**.

Delete a configuration

1. Log in to MarkView and navigate to **Utilities** > **Process Monitor**.
2. Select any configuration and click **Open Configuration**.
3. On the toolbar that appears, click **Delete Configuration**.
4. In the list, select the configuration to delete and click **Delete Configuration**.
   A confirmation window opens.
5. Click **Delete Configuration** to confirm the deletion.

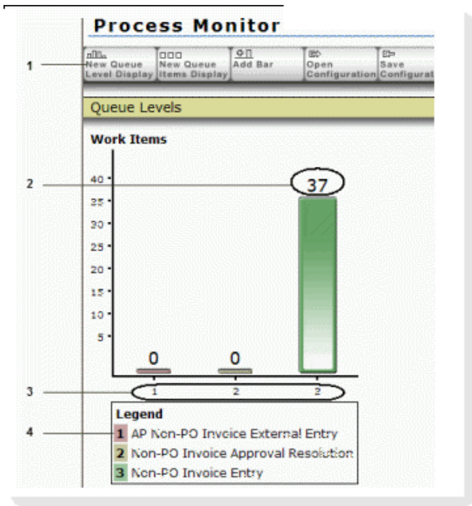
Monitor multiple queues in one bar

1. Log in to MarkView and navigate to **Utilities** > **Process Monitor**.
2. Select a queue-level configuration and click **Open Configuration** or create a new one.
3. Click a bar label under the bar graph.
4. On the **Queue Configuration: Queue & Work Item Classes** page, select the queues to monitor in the current bar. Ctrl-click or Shift-click to make multiple selections.
5. Click **Show Queue Levels** to generate a new queue level display.

> Remember to change the bar label when you change the queue or set of queues that the bar represents.

Work in the bar graph view

To see a queue-level display (which shows the bar graph), open a Process Monitor Configuration and click **Show Queue Levels**. A display similar to the following opens.

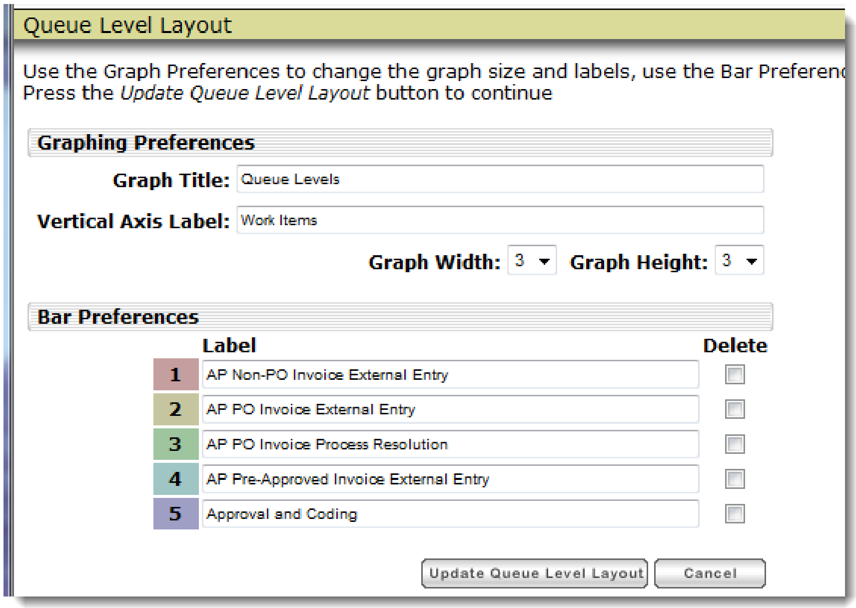


Sample Queue Level Display

1. Process Monitor buttons
2. The number of work items in the queue for the work item class
3. Queue number
4. The queue label corresponding to the queue number

Change the bar graph appearance

1. Log in to MarkView and navigate to **Utilities** > **Process Monitor**.
2. Select a queue-level configuration and click **Open Configuration** or create a new one.
3. To change the layout of the bar graph display, on the toolbar, click **Edit Queue Level Layout**.



4. Edit the **Graph Title** and **Vertical Axis Label** to describe monitoring activities. The defaults are **Queue Levels** and **Work Items**, respectively.

   For example, if the graph monitors only queues within Non-PO Invoice workflow, name the graph "Non-PO Invoices".
5. To control the scale of the bar graph, set the **Width** and **Height**.
6. To change the labels used in the legend for each queue, modify the label.
7. To delete a queue and the associated label, select the **Delete** check box.
8. Click **Update Queue Level Layout**.
9. To save your changes, click **Save Configuration** and complete the **Save** window.

Add a bar to the graph

1. Log in to MarkView and navigate to **Utilities** > **Process Monitor**.
2. Select a queue-level configuration and click **Open Configuration** or create a new one.
3. On the toolbar, click **Add Bar**.

   The **Queue Configuration: Workflows** page opens.
4. Select the queues and work item classes to monitor and click **Show Queue Levels**.

   The queue level display appears with the new bar appended on the right of the graph, irrespective of alphabetical order. If you select multiple queues, the single bar includes them all.

   When you create a new queue level display in which you select multiple queues, the resulting bar graph has a bar for each queue, in alphabetical order. To create a queue level display in a specific order, in which each queue has its own bar, add bars one a time in the preferred order.

Delete a bar from the graph

1. Log in to MarkView and navigate to **Utilities** > **Process Monitor**.

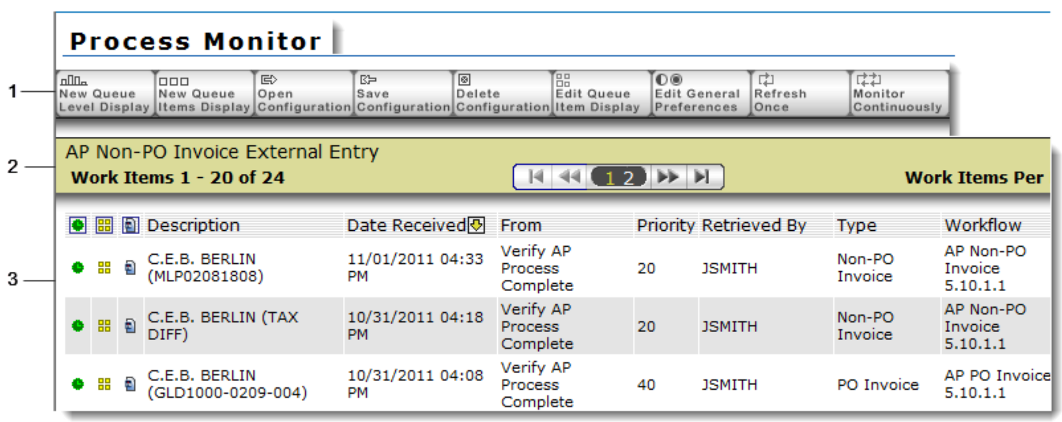
2. Select a queue-level configuration and click **Open Configuration** or create a new one.
3. On the toolbar, click **Edit Queue Level Layout**.
4. Select the check boxes next to the bars to delete.
5. Click **Update Queue Level Layout**.
   The queue level display is refreshed with the bars removed.

Access details about work items in a queue

On a Queue Level Display bar graph, see the work items that are currently in a queue by clicking the queue bar in the bar graph. Clicking the bar opens a Queue Item Display list.

Work with a queue items display list

A Queue Items Display list shows which work items are currently in a queue. For example, the following figure shows the work items in the Non-PO Invoice Entry queue.



Queue Items Display List

1. Process Monitor buttons
2. Queue name and the number of work items in the queue for the work item class and page controls
3. Work item list with icons to access details

In the queue list view:

- When you access the list view from a queue-level graph that monitors multiple queues, the process monitor displays the name of the queue that occurs first alphabetically.
- Page controls let you page forward or backwards, a page at a time, or to the last or first page. If all items fit on a single page, the page control does not appear.
- A control on the right lets you adjust the number of items per page. Enter a number in the text box and click **Apply** to change the display.

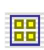
To reorder the list appearance, click a column heading.

To sort in ascending order or descending order, click the column heading. A yellow arrow identifies the sort column and order.

Access work item details

1. Log in to MarkView and navigate to **Utilities** > **Process Monitor**.
2. Select a queue-items configuration and click **Open Configuration** or create a new one.
3. Click an icon to the left of the work item description.
   The table describes the details that each icon displays.

Work Item Details

<table>
<tr><th>Icon</th><th>Description</th></tr>
<tr><td></td><td>Displays the work item history. Each line represents a queue that the work item visited in the course of a workflow. The work item history header provides the same paging and sorting capabilities as the queue items display (see Work with a queue items display list on page 129). The following is an item history example.
<table>
<tr><th>Queue</th><th>Enqueued</th><th>Retrieved</th><th>Retrieved By</th><th>Disposed</th><th>Event</th><th>Event Properties</th></tr>
<tr><td>Starting Point</td><td>10/31/2011 01:48 PM</td><td></td><td></td><td></td><td>WorkItemEnteredQueue</td><td>WorkItemEnteredQueue (Queue='Starting Point')</td></tr>
<tr><td>AP Non-PO Invoice External Entry</td><td>10/31/2011 01:48 PM</td><td></td><td></td><td></td><td>APCNAsyncContinueProcessing</td><td>APCNAsyncContinueProcessing</td></tr>
</table>
</td></tr>
<tr><td></td><td>Displays the selected work item properties and attributes. To view work item properties, scroll through the list. The following is an item properties example.
<table>
<tr><th>Property</th><th>Value</th></tr>
<tr><td>Current Hold</td><td></td></tr>
<tr><td>Current Routing Role</td><td></td></tr>
<tr><td>Current Routing Sequence</td><td></td></tr>
<tr><td>PO Match Type</td><td>3 WAY</td></tr>
<tr><td>AP Created User</td><td>MV_COMM_USER</td></tr>
<tr><td>Accounting Document Number</td><td>5100000008</td></tr>
</table>
</td></tr>
<tr><td></td><td>Opens the corresponding MarkView document in MarkView Viewer.</td></tr>
</table>

Edit a queue items display

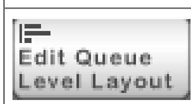
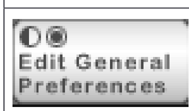
1. Log in to MarkView and navigate to **Utilities** > **Process Monitor**.
2. Select a queue-items configuration and click **Open Configuration** or create a new one.
3. On the toolbar, click **Edit Queue Item Display**.
4. On the **Queue Configuration: Queues & Work Item Classes** page, change your selections as appropriate.
5. To change the workflows selection, click **Select Workflows** to go back to the **Queue Configuration: Workflows** page.
6. When you finish making your selections, click **Show Queue Items** to display the updated version.

Toolbar buttons

Toolbar buttons drive activity and let you navigate in MarkView Process Monitor. As you move between pages in the MarkView Process Monitor, the toolbar changes to reflect what you can do in that particular view. The following table describes the buttons that appear in the toolbar as you change views. Not all buttons appear in every view.

Use toolbar buttons for refresh and paging activities instead of the browser buttons.

Toolbar Buttons and Actions

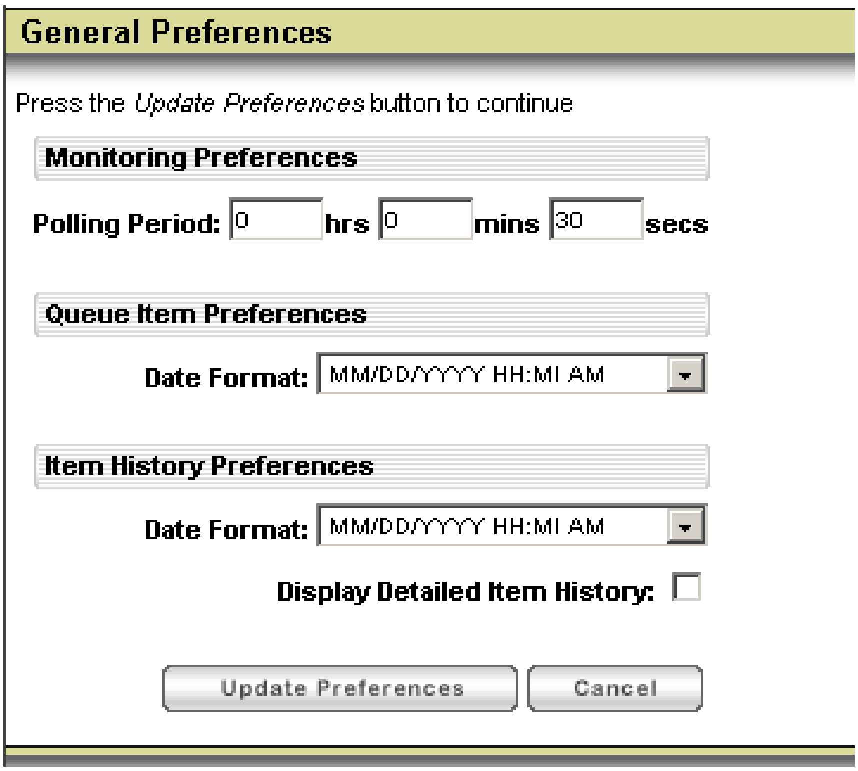
Button	Description
	Opens the Queue Configuration pages to display a new queue bar graph.
	Opens the Queue Configuration pages to display a new queue items view.
	Adds a single bar to the current queue level display.
	Displays a list of stored queue configurations from which to select one to open.
	Saves the current queue level or items display as a stored configuration in the database.
	Displays a list of stored queue configurations from which to select one to delete.
	Changes the wording and appearance of the queue level display.
	Sets preferences for monitoring frequency and date formats in item detail displays.

Button	Description
Refresh Once	Refreshes the data in the current queue level or item display.
Monitor Continuously	Begins periodic refresh activity at the specified polling frequency. Click this button to toggle the Stop Monitoring button.
Stop Monitoring	Stops periodic refresh activity. Click this button to toggle the Monitoring Continuously button. Kofax recommends that you stop monitoring continuously when you no longer require refreshed data.
Show Queue Levels	Returns to the previous queue level display from an queue items display or drill-down view.
Show Queue Items	Returns to the previous queue items displayed from a drill-down view.
Work Item Properties	Switches to the work item properties view from the history view for the currently selected work item. Clicking this button toggles the Work Item History button.
Work Item History	Switches to the history view from the work item properties view for the currently selected work item. Click this button to toggle the Work Item Properties button.
170 MarkView Document	Displays the MarkView document image linked to the currently selected work item from the work item properties or history view.
Select Workflows	Returns to the Queue Configuration: Workflows page from the Queue Configuration: Queues & Work Item Classes page.
Edit Queue Item Display	Changes the configuration of the current queue items display.
Cancel Changes	Reverts changes made in the Queue Configuration pages to the previous queue items display.

Button	Description
	Closes the current page and return to the previous view.

Change Process Monitor characteristics

1. Log in to MarkView and navigate to **Utilities** > **Process Monitor**.
2. Select a configuration and click **Open Configuration** or create a new one.
3. On the toolbar, click **Edit General Preferences**.
   The General Preferences window opens.



4. Make your changes.

Setting	Description
Monitoring Preferences > Polling Period	Set the frequency at which MarkView refreshes the data displayed during continuous monitor mode. Click **Monitor Continuously** on the toolbar to set the mode. Use any combination of hours, minutes, and seconds (default: 30 seconds).
Queue Item Preferences > Date Format	Select the date format to use in the queue item displays.
Item History Preferences > Date Format	Select the date format to use in work item history lists.
Item History Preferences > Display Detailed Item History	Select this option to include the complete set of available columns tracked in a work item history. The default displays a standard set of columns. Additional columns include: • Queue ID • Requeued • Even Occurrences • Out Transition ID

5. Click **Update Preferences**.

   The following preferences control the default date and time formats that appear in the **Process Monitor** lists. To change the format, change the preference settings.
   - MONITOR_HISTORY_DATE_FORMAT
   - MONITOR_WORKITEMS_DATE_FORMAT

Display UTF-8 characters

Configure the MarkView Process Monitor to display UTF-8 characters, which might be used in localized versions of the application.

To display UTF -8 characters, your computer must have the Arial Unicode MS font installed, which is installed by Microsoft Office.

1. Log in to MarkView and navigate to **Administration** > **Process Admin**.
2. Select the **Preferences** tab.
3. In the **Preferences** list view, filter on the preference **MONITOR_WEB_I8N_STYLESHEET**.
4. Select the **System Preferences** tab and click **Add**.
5. Set the preference value to **TRUE** and click **Save**.
   The preference uses Arial Unicode MS to display UTF-8 characters.

Monitor special cases

You may need monitoring to extend beyond standard practices. For example, you might want to display a bar graph, where each bar shows items in the same queue, differentiated by a specific work item property. Do this by setting up different role queue privileges to filter the item property value.

Use Automatic User Setup and Synchronization (AUSS) to map the role to users and to verify that the appropriate responsibility maps to both the user group and the role. See Set up MarkView users with AUSS on page 28 for information about AUSS.

For information about creating roles and assigning roles to users manually, see About MarkView users, user groups, and roles on page 136.

1. Create a role for monitoring purposes and call it "MONITOR ON PROPERTY."
2. Create a filter to verify a filter parameter against the work item property to monitor.
3. Set up role queue privileges on the queue to monitor for the role you created.
   Use the filter created in the preceding step with a privilege code of **Examine** and a filter parameter equal to the item property value. Do this for each property value defined.
4. Assign the role you created to the users who monitor the queue.

Chapter 11

About MarkView users, user groups, and roles

This section describes manual processes for adding users to user groups and roles and should be used by customers who do not use Automatic User Setup and Synchronization (AUSS). If your company uses AUSS, the AUSS synchronization process overwrites many manual assignments. AUSS ignores manual assignments to user groups and roles that do not have related responsibilities in the ERP system.

The manual processes here are used to help clarify how users, user groups, and roles interact. If your company does not use AUSS, these manual assignments only change if someone modifies them.

This chapter describes the MarkView principles behind users, user groups, and roles; how users, user groups and roles work together; and how to ensure that users have the access and tools they need to do their jobs.

- MarkView Users: Each person who uses MarkView is a MarkView user and requires a profile in MarkView. The user profile is a MarkView record that includes:
  - MarkView user name
  - Date when the MarkView user first has access to MarkView
  - Print and export queues the user has assigned for work item processing
  - Date when access to MarkView should end, if applicable
- MarkView User Groups: A user group contains sets of privileges and authorizations that typically match those of a job function in a company, for example, Accounts Payable Clerk. A user group gives members access to MarkView:
  - Document types
  - Menus and tabs
  - Toolsets
  - Viewer

  MarkView users must be members of the All Users user group to access MarkView. You can add users through AUSS or manually if your company does not use AUSS.

  User groups allow members access to specific document types and views of the document. For example, a user group might give members read-only access to Administration tabs. The user group also controls which tools the user has available.

You can associate a user group with an individual organization or globally with all organizations. (For information, see Set up organizations on page 51.)

A user can be a member of many user groups; a user group can have many members. Members of a user group inherit the privileges granted to that group.

> LOCALE user groups display the interface in the localized language. For example, LOCALE_de displays MarkView in German; LOCALE_fr displays MarkView in French. Therefore, if a user belongs to more than one LOCALE user group, the interface appears in only one language. MarkView uses the language with the lowest ID number.
>
> Also, to view the MarkView interface in the localized language, make sure that you add the corresponding language support in Oracle EBS.

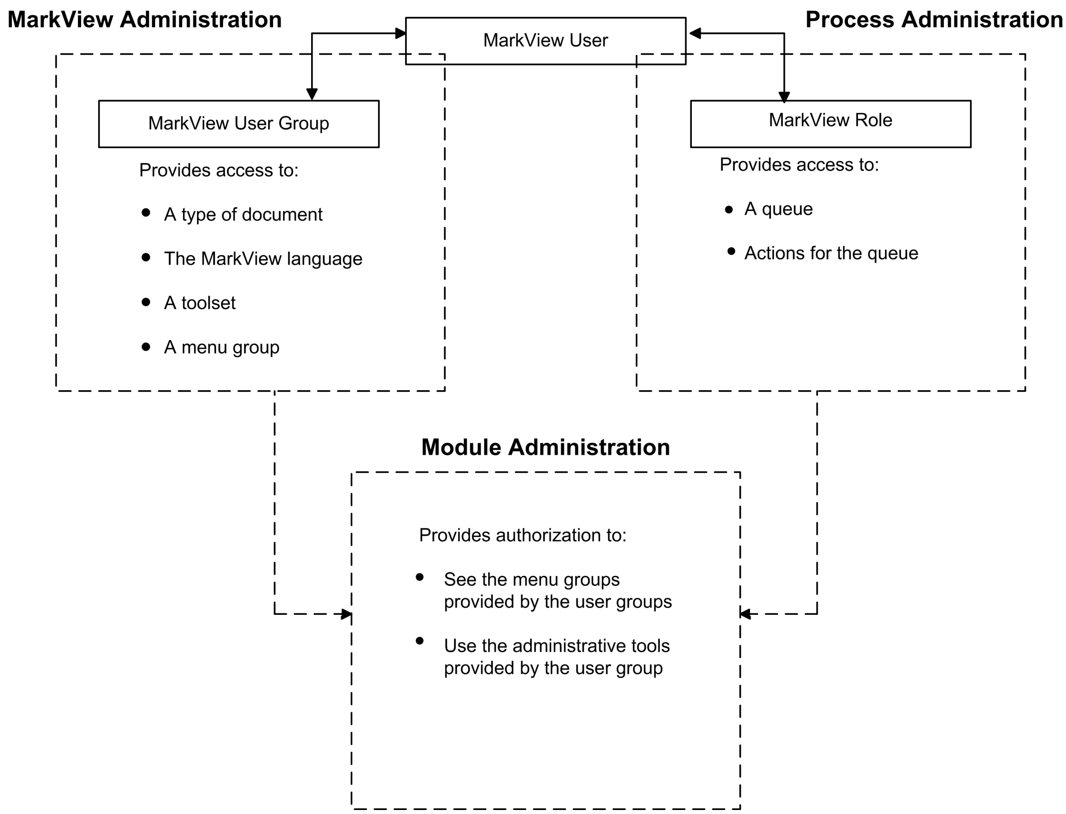
- MarkView Roles: Roles provide members with the authority needed to access workflow queues from which they can retrieve work items. Roles can be global or associated with an organization.

  A user can be a member of many roles. A role can have many members. A role may or may not be associated with a user group.

Three areas of MarkView administration work together to give MarkView User Groups and Roles functionality and security.

- MarkView Administration: Lets you assign a set of preferences to a user group for advanced access security.
- MarkView Process Administration: Lets you create and configure view and retrieval access for a set of queues for a role, or a set of preferences for a role.
- MarkView Module Administration: Lets you authorize which menus a user group can see. This module provides security by ensuring that the user who wants to act on a document belongs to both the right user group and role.

The following figure shows the interaction in MarkView.



Give MarkView users access to MarkView

MarkView requires that users be assigned to user groups for access to the MarkView interface, and to roles for access to queues and the authority to retrieve and act upon work items in those queues.

- A user assigned to only a user group cannot retrieve documents because the user has no access to the queues where the documents wait, nor does the user have authority to retrieve documents.
- A user assigned to only a role can retrieve documents from a queue, but cannot see the MarkView interface required to do so.

The installation process adds default MarkView User Groups and Roles to the system. The user groups and roles are assigned basic toolsets and privileges. For information about installed user groups, roles, and responsibilities, see the table under About job functions on page 149.

Scenario: Separate tasks into groups

Your Accounts Payable department has MarkView users who process PO Invoices. You want to separate them into groups that handle invoice entry and review. To save time, you want members of each group to see only those invoices that are ready to undergo the processing specialty of that group.

To do so:

- Add MarkView users to the PO entry user group (AP ENTRY PO) and role (AP ENTRY PO)

  > When the MarkView User Group and MarkView Role have the same name (AP ENTRY PO), you do not need to add the user to the MarkView Role. MarkView automatically associates user groups and roles with each other and grants all role authorizations and actions to members of the user group with the same name.

  Members of the AP ENTRY PO user group and role can retrieve and examine invoices from PO Invoice Entry queues.
- Add MarkView users to the approval user group (AP RESOLUTION PO APPROVAL) and role (AP RESOLUTION PO APPROVAL)

  Members of the AP RESOLUTION PO APPROVAL user group and role can retrieve and examine invoices from PO Invoice Approval Resolution queues.

> The user groups and roles named in this scenario are default roles provided during MarkView installation.

A PO Invoice entry group member enters the invoice, identifies the invoice entry as completed, and moves the invoice to the next queue, which is the Review Required queue. Until the invoice moves to the Review Required queue, no one in the review user group can see or retrieve the invoice. Nor does anyone in the approval queue see the invoice.

A review user group member completes the invoice review and moves the invoice to a Verify AP Process Complete system queue.

Scenario: Restrict access to MarkView

Your management team has given you an additional resource to handle day-to-day MarkView User management tasks, like setting an alternate user for someone who is absent from the office unexpectedly. You want your assistant to see only those menu items that relate to user management. To do so:

- Create a new user group, for example, MarkView userAdmin
- Add the following user group preferences and set each to ALL
  - ADMIN_ACCESS_MV_USER_GROUP
  - ADMIN_ACCESS_MV_USER_GROUP_MEMBER
  - ADMIN_ACCESS_MV_USER_PREFERENCE
  - ADMIN_ACCESS_MV_USER_PROFILE
- Give the user group authorization to view MarkView menu items through Module Admin (see Assigning Menu Items to User Groups).
  - Administration: MarkView Admin
  - Administration: Process Admin
- Create a new role (see Creating Users).

  Although your assistant does not need to access documents in workflow queues, create a related role to limit what the assistant can access.

Add the following role preferences and set each to ALL:
- ADMIN_ACCESS_SF_USER_PROFILE
- ADMIN_ACCESS_SF_USER_ROLE_GRANT

- Assign a user to the new user group and the new role.

MarkView user ID and password requirements

Under the following conditions, MarkView supports the ISO-8859-1 character set in User IDs and passwords for Western European and US locales.

- If a user name or password contains Western European characters, the user's workstation locale must be set to either a US or Western European locale to log in to MarkView.

  For example, a user whose login name contains Norwegian characters can only log in from a workstation that uses a Western European or US locale. The user cannot log in from a workstation using another locale like Russian.
- When using the Safari browser, a user whose name or password contains non-English characters must enable the option "remember my password" when logging in to MarkView.
- Users logging into sites that use the MarkView Authorization schema (WEBCLNT_SEC_AUTH_TYPE) cannot use non-English characters in their passwords. This includes the MarkView ADMIN user.
- MarkView supports the same special characters in a user ID that the ERP system supports, except for the hash (#).
- MarkView supports the same special characters in a password that the ERP system supports, except for the colon (:).

Manage users

Ensure that every MarkView user has a corresponding Oracle HR record with a valid email address. Users without email addresses cannot participate in MarkView workflows.

Create users

MarkView requires that user IDs be all uppercase with no spaces. Do not try to distinguish user IDs based on capitalization. When matching an ERP operator ID to a MarkView user ID, MarkView performs a case-insensitive comparison and cannot distinguish between users with the same ID in different cases.

For example, although jsmith, JSmith and JSMITH might be different operators in the ERP system, MarkView sees them as the same person.

Once saved, add the user to MarkView user groups and roles to give them permission to view and process work items. Also, users who you create in MarkView Administration will appear in Process Administration windows. To appear in Web Inquiries, the user must belong to MarkView user groups and roles.

1. Log in to MarkView and navigate to **Administration** > **MarkView Admin**.

2. Select the **User Profiles** tab.
   The User Profiles page opens, listing existing users.
3. Click **Add**.
4. On the Add page, complete the new user information and click **Save**.

Disable users in MarkView

Before disabling a user in the ERP system, set a permanent alternate user (who has no end date) in the MarkView system. Failure to set the alternate user in MarkView first can cause you to lose access to in-process documents assigned to the user to disable. For more information, see Handle termination cases on page 145.

You cannot delete a user who has interacted with any MarkView documents. This allows MarkView to retain an accurate history of the document process. However, you can disable a user and therefore stop access to MarkView.

1. Log in to MarkView and navigate to **Administration** > **MarkView Admin**.
2. Select the **User Profiles** tab.
   The **User Profiles** page opens, listing existing users.
3. Locate the user to disable and click the **Details** button next to the user name.
4. In the **Disable Date** field, enter the date when access to MarkView should stop.
5. Click **Save**.
   MarkView displays a message confirming the change.

Delete users

You cannot delete a user who has interacted with any MarkView documents. This allows MarkView to retain an accurate history of the document process. You can delete users who have not accessed any MarkView documents. For example, if you create a user and misspell the name, you can create a new user with the correct name spelling and remove the misspelled user.

1. Log in to MarkView and navigate to **Administration** > **MarkView Admin**.
2. Select the **User Profiles** tab.
   The User Profiles page opens, listing existing users.
3. Locate the user to delete and click the **Details** button next to the user name.
4. Click **Delete**.
   MarkView displays a message confirming the deletion.

Assign users manually

Manual assignments to MarkView users may be overwritten. During an AUSS session, such changes affect MarkView users that have a valid record in the ERP system and at least one responsibility mapped to a MarkView profile in the following cases:

- For manually created users, if you select **Override manually created MarkView users**.
- For users created or managed by AUSS, if you run **Synchronize one user** for this user.

- For all users, if you select **Force full synchronization**. Additionally, users that are not active in Source System will be disabled in MarkView.

In these cases, any manual user assignment to groups and roles is removed and the users are added only to the groups and roles that are mapped to the responsibilities of the users in the ERP system. In other cases, AUSS synchronization does not overwrite manual assignments.

Use the following procedures to manually add MarkView users to groups and roles. Users must already exist in the MarkView system before you can assign them.

Add users to user groups

1. Log in to MarkView and navigate to **Administration** > **MarkView Admin**.
2. Select the **User Groups** tab.
   The **User Groups** page opens, listing existing user groups.
3. Locate the **MarkView User Group** and click the **Details** button next to the name.
   The **User Group Edit** page opens.
4. Select the **User Group Members** tab.
5. Click **Add**.
6. Do one of the following to add a user:
   - Enter the **User ID**.
   - Click **Select User Profile** to browse through a list of users.
   - Next to the user name to add, click the angle arrow.
7. Click **Save**.
   The user is added to the group.
8. For each MarkView user to add, repeat steps 4 to 6.

Add users to a role

If your company does not use AUSS for user, user group, and role mapping, assign ERP responsibilities to MarkView organizations. Otherwise, the users you assign will be unable to process documents in MarkView.

1. Log in to MarkView and navigate to **Administration** > **MarkView Process Admin**.
2. Select the **Roles** tab.
3. Locate the role to assign to the user and click **Details**.
4. Select the **User Role Grants** tab and click **Add**.
5. Click **Select User Profile** and locate the user to add to the role.
6. Click **Select** in the row to the left of the User ID.
7. Click **Save**.
8. For each MarkView user to add, repeat steps 3 to 7.

Manage alternate users

As the MarkView Administrator, you might need to assign an alternate user to handle the tasks for a MarkView user who is currently unavailable or who has left the company.

- To assign an alternate user for someone else, you must be a member of the ALTERNATE USER ADMINISTRATION group.
- The alternate you assign must belong to the same MarkView groups and roles as the original user and have authority to perform the same actions.
- A user may substitute for several users simultaneously. For example, the same user (Jon) may be an alternate user to several users (Donna, Chris, etc.).
- Work items of a user may be forwarded to only one alternate user within the same period. **Examples. 1.** Donna may have Jon as an alternate user from October 2nd to October 14th and then Emma from October 15th to October 18th, but not at the same time. **2.** While Donna has an alternate user (Jon), she may not be an alternate user to other users, because her tasks are being forwarded to Jon. **3.** While Jon is an alternate user to Donna, he cannot have an alternate user himself, so that Donna's work items are not forwarded further to a third, forth, etc. party.

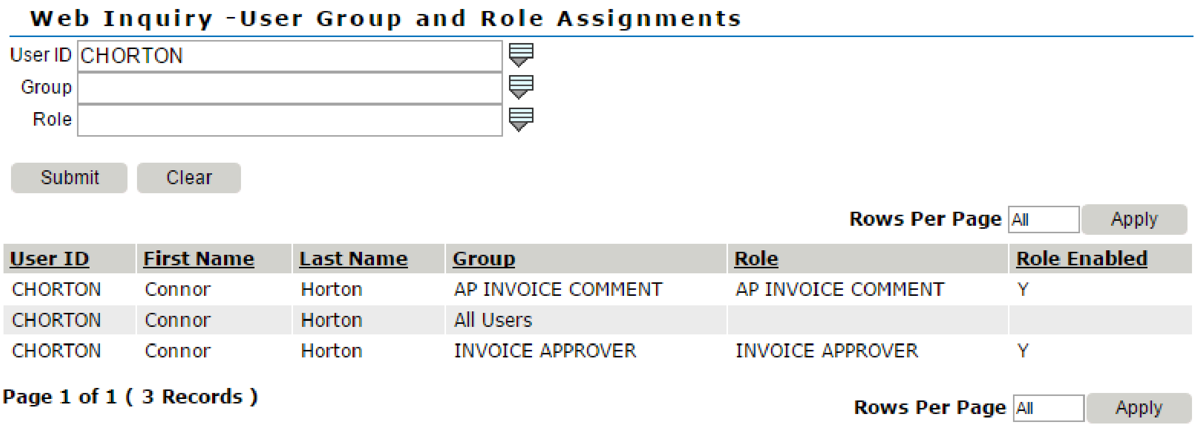
Find a qualified alternate user

To assign an alternate user who is qualified to perform the duties of the original user, determine the privileges, roles, groups for both users.

1. Log in to MarkView and navigate to **Utilities** > **Interactive Query** > **Compliance and Controls** > **User Privileges**.

   This query helps track privileges assigned to employees.
2. Enter the search criteria, when prompted. All of the fields are optional, but at least one must contain data.
   - User ID
   - Group
   - Role

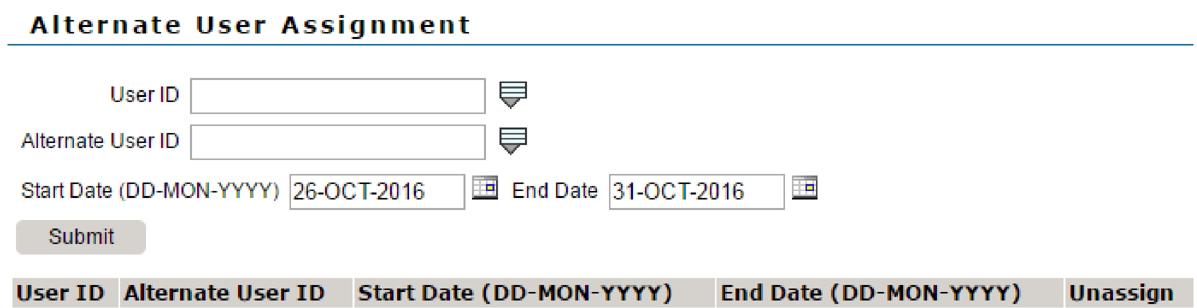
   If searching for a user ID, MarkView returns a line of data for each group and role assignment granted to that user. The search result contains an indication whether the role is enabled. For example, the following figure shows information for User ID CHORTON.



User ID	First Name	Last Name	Group	Role	Role Enabled
CHORTON	Connor	Horton	AP INVOICE COMMENT	AP INVOICE COMMENT	Y
CHORTON	Connor	Horton	All Users		
CHORTON	Connor	Horton	INVOICE APPROVER	INVOICE APPROVER	Y

Add an alternate user assignment

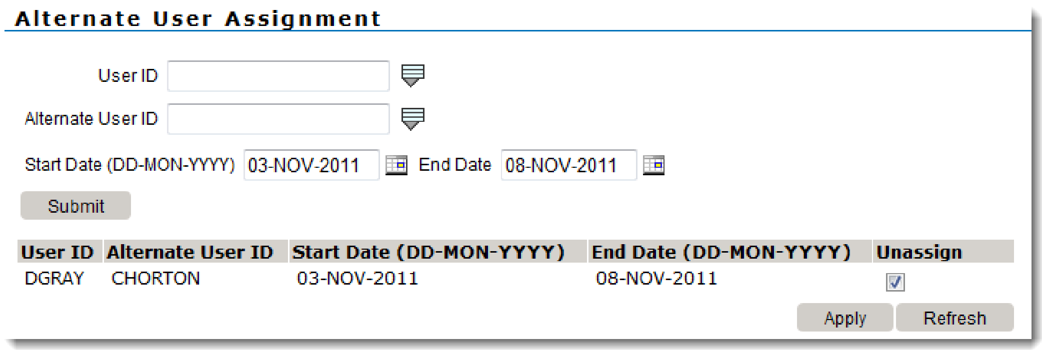
1. Log in to MarkView and navigate to **Administration** > **User Admin** > **Alternate User Assign**.



2. In the **User ID** field, enter the User ID for whom to assign an alternate user, or click the **Select User** button to the right of the field.
3. In the **Alternate User ID** field, enter the User ID of the person who will serve as the alternate user, or click the **Select Alternate User** button next to the field.
4. To specify a start and end date for the assignment, enter or select the start and end dates.
5. Click **Submit**.

Remove an alternate user assignment

1. Log in to MarkView and navigate to **Administration** > **User Admin** > **Alternate User Assign**.



2. Locate the alternate user assignment to remove and select the **Unassign** check box.
3. Click **Apply**.

Handle termination cases

Because the Alternate User assignment interface only shows users who are active in ERP, always assign a permanent alternate user in MarkView before disabling a user in the ERP. The alternate user who has no end date is considered permanent.

Manage MarkView user groups

To assign menus to MarkView User Groups, see Assign menu items to user groups on page 160.

Create user groups

1. Log in to MarkView and navigate to **Administration** > **MarkView Admin**.
2. Select the **User Groups** tab.
   The User Groups page opens, listing existing user groups.
3. Click **Add**.
4. Enter the name of the new user group and click **Save**.
   You can now add users and assign permissions to the group.

Assign permissions to user groups

1. Log in to MarkView and navigate to **Administration** > **MarkView Admin**.
2. Select the **User Groups** tab.
   The User Groups page opens, listing existing user groups.
3. Click **Details** next to the group to update.
4. Click the tab for the authorization to change:
   a. **Document Privilege Auths**: For the selected document type, specify the action that members can take, for example, allow group members to enter self-service invoices.

b. **Document Toolset Auths**: For the selected document type, specify the toolset available to group members, for example, allow group members to take an Increase Priority action on a document.

c. **User Group Org Auths**: Specify the MarkView organizations for which members can view documents.

d. **Tool Privilege Auths**: For the selected document type, specify additional tools available to group members.

5. Edit the permissions and click **Save**.

Authorize user groups access by an organization

To give all MarkView users access to an organization, add organization authorization to the All Users group. For example, if you work for a small company with only one MarkView organization, you may need to give all MarkView users access to that organization. (For information about setting up organizations, see Set up organizations.)

1. Log in to MarkView and navigate to **Administration** > **MarkView Admin**.
2. Select the **User Groups** tab.
   The User Groups page opens, listing existing user groups.
3. Search for the group called **All Users** and click **Details** next to the group name.
   The **User Groups** page opens, listing existing user groups.
4. Select the **User Group Org Auths** tab.
5. Click **Add**.
6. Enter the Org Short name to which all users should have access.
7. Click **Save**.

Delete user groups

You cannot delete a user group that has the following:

- User Group Members
- Document Privileges Authorizations
- User Group Organization Authorization
- Tool Privileges Authorization

1. Log in to MarkView and navigate to **Administration** > **MarkView Admin**.
2. Select the **User Groups** tab.
   The User Groups page opens, listing existing user groups.
3. Locate the user group to remove and click the **Details** button next to the user name.
4. Click **Delete**.
   MarkView displays a message confirming the deletion.

Manage user roles

Roles provide members with the authority needed to access workflow queues from which they can retrieve work items. Roles can be global or associated with an organization.

Create roles

1. Log in to MarkView and navigate to **Administration** > **MarkView Process Admin**.
2. Select the **Roles** tab and click **Add**.
3. In the **Role ID** field, enter a role name.

   If you give the role the same name as a MarkView User Group, MarkView assigns the role authorizations and actions to the members of the User Group. However, each role name must be unique within MarkView.

4. Click **Save**.

Configure roles

When you configure a role, you establish how role members can interact with what they view. For example, you can specify that role members have view-only access to the Process Monitor. Assigning the Role Preference, MONITOR_READ_ONLY, lets role members use existing configurations in the Process Monitor, but prohibits them from creating new configurations.

1. Log in to MarkView and navigate to **Administration** > **MarkView Process Admin**.
2. Select the **Roles** tab.
3. In the **Roles** list, locate the line with the role to configure and click **Details**.
4. Add users to the role as follows:
   a. Select the **User Role Grants** tab and click **Add**.
   b. Locate the row with the user to add and click the angle arrow next to the User ID.
   c. Click **Save**.
5. Configure Role Preferences as follows:
   a. Select the **Preferences** tab and click **Add**.
   b. Locate the row containing the preference to add and click the angle arrow.
   c. Select the setting to use and click **Save**.
6. Specify queues that role members can access:
   a. Select the **Role Queue Privileges** tab and click **Add**.
   b. Select the queue, actions that the role members can take, and the items on which the role members can act.
   c. Click **Save**.

MarkView no longer uses two tabs that might appear: **Role Routable Queues** and **Role Action Auths**.

Delete roles

1. Log in to MarkView and navigate to **Administration** > **MarkView Process Admin**.
2. Select the **Roles** tab.
3. Locate the role to remove and click the **Details** button next to the user name.
4. Click **Delete**.

Scenario: Limit Request Comment

For example, your company uses AUSS and wants to limit the users who can request and respond to comments. Because all users are members of the AUSS Everyone profile, which includes the COMMENTER role, all users have the ability to request and respond to comments.

Restrict Request Comment to a limited set of users

1. Log in to MarkView and navigate to **Administration** > **MarkView Process Admin**.
2. Select the **Roles** tab.
3. Remove the COMMENTER role from the AUSS Everyone Profile.
4. Add the COMMENTER role to an existing profile, for example, AP Manager, or create a new profile to which to add the role.

   If you do not use AUSS, add the COMMENTER role to those users who will be available for commenting.

Enable Request Comment for a user group

1. Log in to MarkView and navigate to **Administration** > **MarkView Admin**.
2. Select the **User Groups** tab.
3. Locate the line for the group to award Request Comment privileges and click **Details**.
4. Select the **Document Toolset Auths** tab.
5. Click **Add**.
6. Select the <Document Type>.
7. Select the **Comment Request** toolset.
8. Click **Save.**

Disable Request Comment for a user group

1. Log in to MarkView and navigate to **MarkView Admin** > **User Group**.
2. Locate the line for the group that has Request Comment privileges to remove and click **Details**.

3. Select the **Document Toolset Auths** tab.
4. Locate the Document Type from which to remove the Request Comment privileges and click **Details**.
5. Select the **Comment Request** toolset and click **Delete**.
6. Click **Save**.

About job functions

The table lists default MarkView User Groups, MarkView Roles, and job functions.

User Group and Role Job Functions

User Group	Role	Job Function
ACTIONS ADMINISTRATOR		Provides access to the Automated Actions menu item and Automated Actions Configuration window.
ACTIONS MANAGER		Enables a user to perform actions on invoices.
ALTERNATE USER ADMINISTRATOR		Enables a MarkView user to administer alternate user assignments.
AP CODING PROJECT ACCOUNTING		Enables a MarkView user to assign distribution lines based on project data.
AP ENTRY NON-PO	AP ENTRY NON-PO	Enables a MarkView user to enter non-PO invoices. When implemented, the Sub Type feature lets a MarkView user enter invoices based on the Sub Types to which they have access.
AP ENTRY PO	AP ENTRY PO	Enables a MarkView user to enter PO invoices. When implemented, the Sub Type feature lets a MarkView user enter invoices based on the Sub Types to which they have access.
AP ENTRY PRE-APPROVED	AP ENTRY PRE-APPROVED	Enables a MarkView user to enter pre-approved invoices. When implemented, the Sub Type feature lets a MarkView user enter invoices based on the Sub Types to which they have access.
AP ENTRY SUPPLIER	AP ENTRY SUPPLIER	Enables a MarkView user to enter supplier information.

User Group	Role	Job Function
AP INVOICE CODER	AP INVOICE CODER	Enables a MarkView user to code an invoice by adding accounting details.
AP INVOICE COMMENT	AP INVOICE COMMENT	Provides access to non-PO invoices that require comment.
AP INVOICE ENTRY REVIEW	AP INVOICE ENTRY REVIEW	Enables a MarkView user to review invoices that fail the entry-complete check point.
AP INVOICE FOLLOW-UP	AP INVOICE FOLLOW-UP	Enables a user to review a follow-up document that failed because the attachment did not attach to the invoice document record.
AP INVOICE FOLLOW-UP COMMENT	AP INVOICE FOLLOW-UP COMMENT	Enables a user to provide insight about a follow-up document attachment that failed.
AP PO COMMENT	AP PO COMMENT	Enables a user to provide insight about a PO invoice.
AP PRE-APPROVED COMMENT	AP PRE-APPROVED COMMENT	Provides access to pre-approved invoices that require comment.
AP RESOLUTION	AP RESOLUTION	Provides access to all items in the AP Resolution queue and enables an AP user to resolve AP invoice issues. When implemented, the Sub Type feature lets an AP user access items based on the Sub Type roles to which they are assigned.
AP RESOLUTION NON-PO	AP RESOLUTION NON-PO	Provides access to non-PO work items requiring AP intervention during the non-PO approval process. When implemented, the Sub Type feature lets a MarkView user access items based on the Sub Type roles to which they are assigned.
AP RESOLUTION NON-PO APPROVAL	AP RESOLUTION NON-PO APPROVAL	Provides access to non-PO work items in the AP resolution queue.
AP RESOLUTION PO	AP RESOLUTION PO	Provides access to PO work items in the AP resolution queue. When implemented, the Sub Type feature lets a MarkView user access items based on the Sub Type roles to which they are assigned.

User Group	Role	Job Function
AP RESOLUTION PO MATCH ERROR	AP RESOLUTION PO MATCH ERROR	Provides access to PO work items in the AP resolution queue. When implemented, the Sub Type feature lets a MarkView user access items based on the Sub Type roles to which they are assigned.
AP RESOLUTION PO PURCHASING	AP RESOLUTION PO PURCHASING	Provides access to invoices with purchasing holds.
AP RESOLUTION PO RECEIVING	AP RESOLUTION PO RECEIVING	Provides access to invoices with receiving holds.
AP RESOLUTION PRE-APPR COMMENT	AP RESOLUTION PRE-APPR COMMENT	Provides access to invoices requiring AP intervention during the pre-approved comment process.
AP RESOLUTION PRE-APPROVED	AP RESOLUTION PRE-APPROVED	Provides access to pre-approved work items in the AP Resolution queue.
AP RESOLUTION PREVIOUSLY ENTER	AP RESOLUTION PREVIOUSLY ENTER	Provides access to previously entered work items in the AP Resolution queue.
AP RETURNED INVOICE RECOVERY		Enables a MarkView user to recover returned invoices using the Recover Invoice action.
AP SENIOR FINANCIAL AUDIT	AP SENIOR FINANCIAL AUDIT	Provides access to work items in the Senior Financial Audit queue.
AP VERIFY PO INVOICE RECEIPT	AP VERIFY PO INVOICE RECEIPT	Provides access to PO work items requiring receipt verification, such as 2-way matched invoices.
AP VIEW ALL DOCUMENTS		Allows a MarkView user to bypass the document/workflow security rules for AP invoice documents.
AP VIEW SUPPLIER DOCUMENTS		Allows a MarkView user to bypass the document/workflow security rules to view documents.
APPROVAL HIERARCHY ADMIN		Enables the system administrator to configure the MarkView hierarchy.
ARCHIVE		Enables a MarkView user to archive selected document types to Document Library.
All Users		Provides access to basic tools and documents. This group is the default MarkView user group. ASdd this group to all MarkView suite users.

User Group	Role	Job Function
	COMMENTER	Allows users to respond to a Request Comment action. By default, all MarkView users are assigned to this COMMENTER role.
CONFIDENTIAL		Allows a MarkView user to mark an invoice as Confidential using the Confidential action.
	CONNECTOR ADMIN	Enables a MarkView user to monitor all connector workflow queues.
	CONNECTOR EXPORT MONITOR	Enables a MarkView user to monitor work items in connector export queues.
	CONNECTOR IMPORT MONITOR	Enables a MarkView user to monitor work items in connector import queues.
CONNECTOR REVIEW	CONNECTOR REVIEW	Enables a MarkView user using quick invoices to retrieve connector work items for review. The CONNECTOR_REVIEW role must have a valid email address.
	CONNECTION VALIDATION MONITOR	Enables a MarkView user to monitor workflow items in connector validation queues.
COPY DOCUMENT		Provides access to the Copy Document action. Enables a MarkView user to create duplicates of the document image.
EMAIL DOCUMENT		Enables a MarkView user to send email containing a link to the document image.
EMAIL DOCUMENT ATTACHMENT		Enables a MarkView user to send email containing an attached document image.
EXP VIEW ALL DOCUMENTS		Allows a MarkView user to bypass the document/workflow security rules to view expense documents.
EXTERNAL APPROVER		Allows MarkView users to review Connector invoices sent to them through the Request External Review action.
FREIGHT REVIEW NON-PO	FREIGHT REVIEW NON-PO	Provides access to non-PO invoices in the Freight Review Required queue.

User Group	Role	Job Function
FREIGHT REVIEW PRE-APPROVED	FREIGHT REVIEW PRE-APPROVED	Provides access to pre-approved invoices in the Freight Review Required queue.
FREIGHT REVIEW PO	FREIGHT REVIEW PO	Provides access to PO invoices in the Freight Review Required queue.
INTERACTIVE QUERIES		Provides access to Interactive Queries.
INVOICE APPROVER	INVOICE APPROVER	Enables users to approve non-PO invoices. To let users assigned to this group or to this role approve multiple invoices, set MVT_WIB_ALLOW_APPROVE = TRUE for the group or role.
INVOICE AUDIT		Enables users to access the Invoice Audit utility and all MarkView document types.
LOCALE_de		Specifies German as the interface language for group members.
LOCALE_en		Specifies US English as the interface language for group members.
LOCALE_es_ES		Specifies Castilian Spanish as the interface language for group members.
LOCALE_fr		Specifies French as the interface language for group members.
LOCALE_ja		Specifies Japanese as the interface language for group members.
LOCALE_it		Specifies Italian as the interface language for group members.
LOCALE_pl		Specifies Polish as the language that group members see in the interface.
LOCALE_pt_BR		Specifies Brazilian Portuguese as the interface language for group members.
LOCALE_zh_CHS		Specifies Simplified Chinese as the interface language for group members.
MANUAL REVIEW	MANUAL REVIEW	Provides access to the Uncategorized Document queue. Enables a MarkView user to recategorize documents.

User Group	Role	Job Function
MarkView Administration Group		Used by the default system-assigned user only. Not required by other MarkView users.
MarkView RECORDS MGMT ADMINISTRATOR		Enables a MarkView user to administer MarkView Document Library.
MarkView WEB ADMINISTRATOR		Provides access to MarkView Web Administration.
MODULE ADMINISTRATOR		Enables a MarkView user to administer MarkView business modules.
MVCN VIEW ALL DOCUMENTS		Allows a MarkView user to bypass the document/workflow security rules for transformation and e-Invoice document types.
PO INVOICE REVIEW - PURCHASING	PO INVOICE REVIEW - PURCHASING	Enables a MarkView user to assign PO numbers to invoices that the AP user could not process.
PREVIOUSLY ENTERED INVOICES	PREVIOUSLY ENTERED INVOICES	Provides access to the Previously Entered Web application.
PROCESS MONITOR	PROCESS MONITOR	Enables MarkView users to access to the Process Monitor.
	PROCESS WEB ADMINISTRATOR	Provides access to Process Administrator functions.
QA	QA	Provides access to all document types to attach document images to existing ERP records.
QA NON-PO	QA NON-PO	Provides access to non-PO documents to attach document images to existing ERP records.
QA PO	QA PO	Provides access to PO documents to attach document images to existing ERP records.
QA PRE-APPROVED	QA PRE-APPROVED	Provides access to pre-approved documents to attach document images to existing ERP records.
RECYCLE REVIEW	RECYCLE REVIEW	Provides access to work items in the Recycle Requested queue.
RESCAN	RESCAN	Enables a MarkView user to rescan document images.
RETURNED INVOICE REVIEW	RETURNED INVOICE REVIEW	Provides access to work items in the Return to Supplier Requested queue.

User Group	Role	Job Function
REVIEW	REVIEW	Provides access to all work items in the Review Requested queue.
REVIEW NON-PO	REVIEW NON-PO	Provides access to non-PO work items in the Review Requested queue.
REVIEW PO	REVIEW PO	Provides access to PO work items in the Review Requested queue.
REVIEW PRE-APPROVED	REVIEW PRE-APPROVED	Provides access to pre-approved work items in the Review Requested queue.
REVIEW PRE-APPROVED COMMENT	REVIEW PRE-APPROVED COMMENT	Provides access to pre-approved work items that require comment.
	SQL*FLOW ADMINISTRATION	Provides access to work items in the Workflow Administration queue.
	SQL*FLOW MAIL GATEWAY	MarkView Mail Gateway uses this role. Do not assign this role to users.
SAVE ROTATION USERS		Enables users to save image rotations.
SCAN USERS		Provides settings and privileges needed for a MarkView user to scan documents into MarkView and validate documents in Kofax Transformation Modules.
SUPPLIER FOLLOW-UP	SUPPLIER FOLLOW-UP	Enables a MarkView user to review a follow-up document that failed because the attachment did not attach to the supplier record.
SUPPLIER FOLLOW-UP COMMENT	SUPPLIER FOLLOW-UP COMMENT	Provides access to supplier follow-up invoices that require comment.
SUPPLIER MAINTENANCE	SUPPLIER MAINTENANCE	Provides access to work invoices in the Supplier Maintenance queue.
SUPP SENIOR FINANCIAL AUDIT	SUPP SENIOR FINANCIAL AUDIT	Provides access to Web Inbox menu Supplier Documents. MarkView users can retrieve and review supplier work items in the Senior Financial Audit queue.
TAX REVIEW NON-PO	TAX REVIEW NON-PO	Provides access to non-PO invoices in the Tax Review Required queue.
TAX REVIEW PRE-APPROVED	TAX REVIEW PRE-APPROVED	Provides access to pre-approved invoices in the Tax Review Required queue.
TAX REVIEW PO	TAX REVIEW PO	Provides access to PO invoices in the Tax Review Required queue.

User Group	Role	Job Function
WEB INQUIRY		
WORKFLOW ADMINISTRATOR	WORKFLOW ADMINISTRATOR	Enables MarkView users to monitor the Workflow Administration queue in all workflows.
	WORKFLOW ADMINISTRATION	Enables MarkView users to access the Recycle Bin queue.

Chapter 12

Configure MarkView menus

This section describes how to control the menu items that appear in the MarkView interface and the behavior of items accessed through MarkView.

Only use MarkView Business Module menu items not described in this guide under the direction of Kofax Professional Services or Technical Support.

About menu items

You can configure the menu items that appear in MarkView Home and submenu items that appear under primary menus. Use Module Admin to rename, delete and add menu items, or change what happens when a user selects an item.

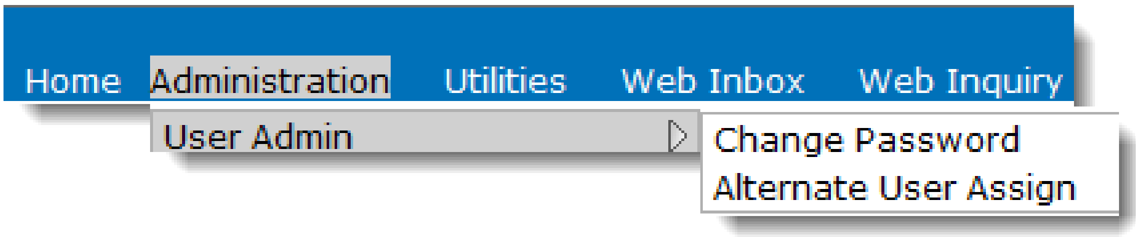
Keep track of menu changes you make. Applying patches or upgrading the system could revert those changes.

MV Home Menu Item Admin

Menu Description	Menu Sequence (Order)	Default Item Label	Item Label Message	Item Type	Item Value
Administration	1	User Admin		MENU	User Admin
Administration	2	MarkView Admin		URL	MV_Admin_Home.Hor
Administration	3	Process Admin		URL	SF_Admin_Home.Hon
Administration	4	Module Admin		URL	MVT_Toolkit_Admin.H
Administration	5	Verify MarkView		URL	MVW_Folder.ShowFo
Administration	6	Work Item Details		URL	MVAP_WorkItem_Hist
Administration	7	Approval Hierarchy Admin		URL	mvt_approval_hierar

Each column defines the characteristics of a row entry and each row defines a menu item.

- **Menu Description**: Shows the menu name and the names of all menus that have submenu items. For example, the MarkView Home page has a menu item "Administration." Under Administration is a submenu item, "User Admin," which has two submenu items of its own.



Because both Administration and User Admin have submenus, they appear in the Menu Description column. The submenus associated with them appear in the Default Item Label column.

Menu Description	Menu Sequence	Default Item Label
User Admin	1	Change Password
User Admin	2	Alternate User Assign

- **Menu Sequence (Order)**: Shows the order in which submenu items appear. In the main menu, lower numbers push a menu item further to the left. In submenus, lower numbers push a menu item higher.

  For example, in the preceding figure, number 1 specifies that Change Password appears first, followed by the submenu item with the sequence assignment of 2, Alternate User Assign.

  MarkView sorts menu items first by the Menu Description, then by Menu Sequence number.
- **Default Item Label**: Shows the default name that appears in the interface.
- **Item Label Message**: Shows the localized message that appears when the user accesses a localized interface.
- **Item Type**: Specifies if the item is a menu or submenu item, or a link to the URL page.
  - MENU: Generates a submenu when a user selects the item. Set the Item Value to the name of the menu. When a user clicks the menu, a submenu pops up.
  - URL: Triggers an action when a user selects the item. Set the Item Value to one of the following:
    - A full URL, such as http://aphost.nonesuch.com:8889/sfasmm. When a user clicks Load Hierarchy Data, the system accesses the specified URL.
    - The full name of a PL/SQL procedure or an argument that passes to the PL/SQL procedure using CGI format.

      When a user selects Verify MarkView, no submenu appears; instead the system invokes the following PL/SQL procedure:

      MVW_Folder.ShowFolder

      Because the system uses CGI format to pass arguments (FolderID=1) to the target PL/SQL procedure, the Item Value is set to the following:

      MVW_Folder.ShowFolder?FolderID=1
- **Item Value**: Stores reference to a page or a URL to which the menu item is connected.

- **MarkView Home Aware**: Determines how the window refreshes.
  - Y (yes): Retains the current MarkView top frame; does not refresh the window. Used for partial URLs that usually call a procedure.
  - N (no): Redraws the MarkView top frame. Used for fully qualified URLs.

To edit a menu item, click **Update**.

To delete a menu item, click **Delete**.

Add a menu item

When you add a menu item, the item remains inactive until you assign it to a user group (see Assign menu items to user groups on page 160).

1. Log in to MarkView and navigate to **Administration** > **Module Admin**.
2. Select the **Menu Item** tab.
3. Scroll to the bottom of the page and click **Insert**.
4. Scroll to the bottom of the page and complete the form. (For detailed descriptions of the boxes to fill in, see About menu items on page 157.)
   - **Menu Name**: Select a menu name.
   - **Menu Sequence**: Enter a number to specify where the item appears in the menu:
     - In the main menu, lower numbers to push a menu item to the left.
     - In submenus, lower numbers push a menu item higher in the list.
   - **Item Type**: Specify if the item is a menu item, a link to the URL page, or a command sequence.
     - **MENU**: Generates a submenu when a user selects the item. Set the Item Value to the name of the menu. When a user clicks the menu, a submenu pops up.
     - **URL**: Triggers an action when a user selects the item. Set the Item Value to a full URL or a PL/SQL procedure.
   - **Default Item Label**: Enter the default name that appears in the interface.
   - **Item Label Message**: Leave this field blank unless you already have a MarkView Message to use for the menu item label.
   - **Item Value**: Stores reference to a page or a URL to which the menu item is connected.
   - **MarkView Home Aware**: Accept the default value.
5. Click **Insert**.
6. Assign the menu item to the appropriate user groups (see Assign menu items to user groups on page 160).

Modify a menu item

1. Log in to MarkView and navigate to **Administration** > **Module Admin**.
2. Select the **Menu Item** tab.
3. Locate the line containing the item to change and click **Update**.

4. Complete the form and click **Update** again.

Remove a menu item

You cannot remove a menu if submenu items are associated with it, if the menu is assigned to any user groups, or if the menu item has foreign relationships configured.

1. Log in to MarkView and navigate to **Administration** > **Module Admin**.
2. Select the **Menu Item** tab.
3. Locate the line containing the item to remove and click **Delete**.
4. Click **Delete** again to confirm the deletion.

Assign menu items to user groups

Before a new menu or submenu item becomes activated, the item must be assigned to a user group. User groups have different sets of menus based on the tasks the user group performs. For example, Administrative groups access a different set of menus than Invoice Approver groups.

Assign menu items to user groups, not to individual users.

The Module Administrator user group can view a full set of menus. Other user groups can view only the Change Password menu (other user groups may need access to additional menus). Enable the appropriate set of menus for each user groups.

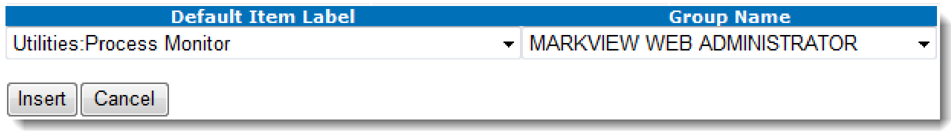
1. Log in to MarkView and navigate to **Administration** > **Module Admin**.
2. Select the **Menu Item Group Auth** tab.

MV Home Menu Item Group Admin

Item Menu	Default Item Label	User Group
Administration	AUSS Mapping Administration	AUSS MAPPING ADMINISTRATOR
Administration	Approval Hierarchy Admin	APPROVAL HIERARCHY ADMIN
Administration	Approval Hierarchy Admin	MODULE ADMINISTRATOR
Administration	Load Hierarchy Data	MODULE ADMINISTRATOR
Administration	MarkView Admin	MODULE ADMINISTRATOR
Administration	Module Admin	MODULE ADMINISTRATOR
Administration	Process Admin	MODULE ADMINISTRATOR
Administration	User Admin	All Users

3. Click **Insert**.
4. At the bottom of the page, locate the **Default Item Label** list and select the **Item Label** for the menu item to assign.
5. In the **Group Name** list, select the Group for which to authorize the menu item.

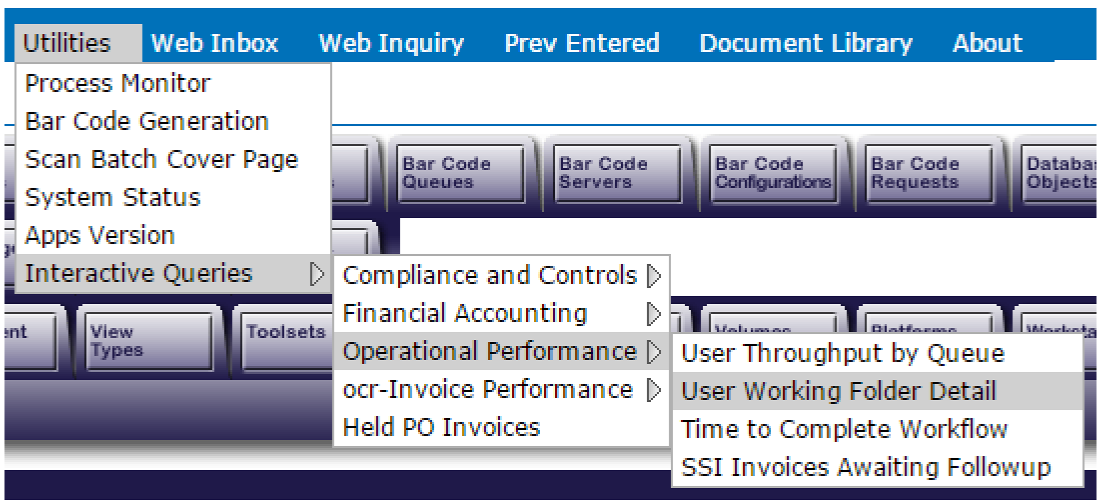
   For example, the following shows how to enable everyone in the MarkView Web Administrator user group to see the Utilities > Process Monitor menu:



6. Click **Insert** again.
7. If you assign a submenu item to a user group, also assign the parent menu item to the user group. Otherwise, the user group cannot view the menu item.

   For example, you need to give a user group access to the interactive query that lets members see working folder details.

   The MarkView System Administrator can allow access to each inquiry based on user permissions. For example, the company controller can access the Unprocessed Invoice Liability query, which provides the total value of invoices the AP department is processing. However, the controller does not need access to User Working Folder Detail, a query that provides detail of individual employee Working Folders.



To allow access, you need to run the process 4 times to award the user group access to each of the following menu items:

- Utilities
- Interactive Queries
- Operational Performance
- User Working Folder Details

Chapter 13

MarkView approval hierarchy

If your company does not use an ERP approval hierarchy, you can create and deploy one in MarkView.

Set up hierarchy components

Approval hierarchies consist of Organizations, jobs (assignments and supervisor assignments), and users. You can create instances of these components and maintain existing components.

Maintain approval organizations

Organizations fall into two categories: ERP and non-ERP. ERP Organizations are defined in Module Administration (see Configure MarkView menus). All non-ERP Organizations are categorized under a single ERP Org ID, -1 .

Create an approval organization

1. Log in to MarkView and navigate to **Administration** > **Approval Hierarchy Admin**.
2. Select the **Approval Organization** tab.
   The Approval Organization Admin page opens. Organizations that are already set up for approval appear in a list below the page.
3. In the list, select an ERP Org ID.
   The list is populated with Organizations defined in Module Administration. The –1 (Non-ERP) option is reserved for non-ERP Organizations.
4. Click **Insert**.
   The ERP Org ID that you set up appears in the approval list.
5. Next to the ERP Org ID name, click **Update**.
6. Select how the hierarchy determines the approval limit:
   - **By User**: MarkView users each have an approval limit assigned to them and they can approve up to that approval limit.
   - **By Job**: MarkView users who are assigned to a job title can approve up to the approval amount assigned to the job title.
7. Click **Update**.

Update approval organizations

1. Log in to MarkView and navigate to **Administration** > **Approval Hierarchy Admin**.

2. Select the **Approval Organization** tab.
3. Click the **Update** link to the right of the Organization to update.
   The Approval Organization Admin - Update page opens.
4. On the **Update** page, change the **Org Name** or **Authorization** and click **Update**.

Delete approval organizations

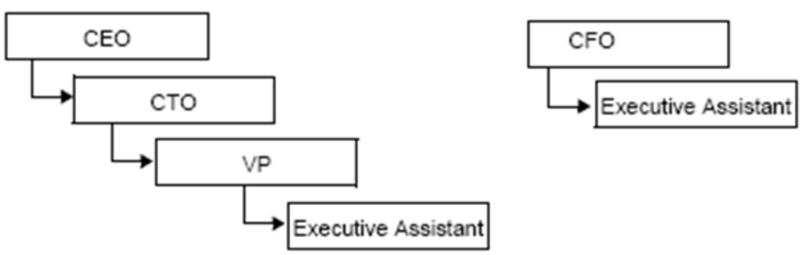
You can only delete an Organization that has no current job assignments.

1. Log in to MarkView and navigate to **Administration** > **Approval Hierarchy Admin**.
2. Select the **Approval Organization** tab.
3. Click the **Delete** link to the right of the Organization to delete.
   The Approval Organization Admin - Delete page opens.
4. Confirm the deletion by clicking **Delete**.

Maintain job titles

A job title is a specific designation of a post within an organization and is normally associated with a job description that details the tasks and responsibilities of the job. In MarkView, each job title becomes part of a reporting structure that includes supervisory job titles.

Once you assign a job title to a reporting structure for the first time, the job title is locked into that reporting structure. You cannot then assign the job title to a superior in a different structure. For example, your company might have many Executive Assistants who report to managers who are not part of the same reporting structure as shown in the following figure.

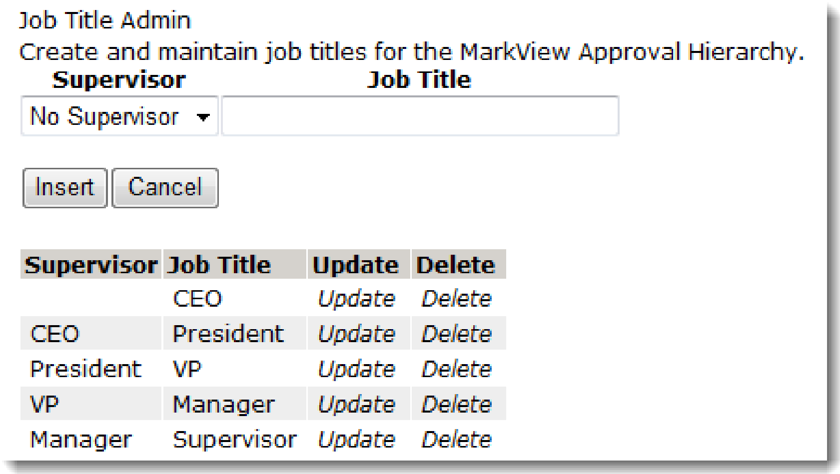


In the first chain, the CEO can have an Executive Assistant, the CTO can have an Executive Assistant, and the VP can have an Executive Assistant. In the second chain, the CFO can have an assistant who has a different job title, for example, "Executive Assistant B."

When creating a new job title, you also assign a supervisor, as applicable.

Create a job title

1. Log in to MarkView and navigate to **Administration** > **Approval Hierarchy Admin**.
2. Select the **Job Title** tab.
   The Job Title Admin page opens. Jobs that are set up for approval appear in a list below the page.



3. In the list, select a Supervisor, or keep the default **No Supervisor**.
4. In the text field, enter a Job Title that is unique within the hierarchy subsystem.
5. Click **Insert**.

Update job titles

1. Log in to MarkView and navigate to **Administration** > **Approval Hierarchy Admin**.
2. Select the **Job Title** tab.
3. In the list on the Job Title Admin page, click the **Update** link to the right of the job title to update.
   The Job Title Admin - Update page opens.
4. In the update page, change the Job Title or Supervisor Assignment, as appropriate.
5. Click **Update**.

Delete a job title

You can only delete a job title if no subordinate users are assigned.

1. Log in to MarkView and navigate to **Administration** > **Approval Hierarchy Admin**.
2. Select the **Job Title** tab.
3. On the Job Title Admin page, click the **Delete** link to the right of the job title to delete.
   The **Job Title Admin - Delete** page opens.
4. Confirm the deletion by clicking **Delete**.

Maintain approval users

You set up approval users from available MarkView User IDs. Approval users must be members of the MarkView Invoice Approvers user group to receive invoices for approval.

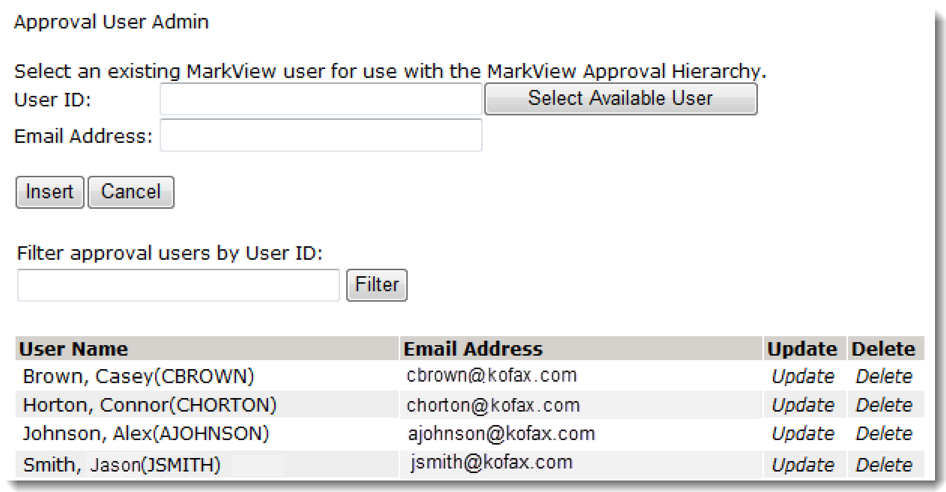
Add users who will be approvers in the hierarchy to the Invoice Approvers user group before or after creating an approval hierarchy. See MarkView approval hierarchy, to use AUSS or Add users to user groups on page 142 to add users manually.

Create approval users

1. Log in to MarkView and navigate to **Administration** > **Approval Hierarchy Admin**.
2. Select the **Approval User** tab.

   The Approval User Admin page opens. Users who are already set up for approval appear in a list below the page.

   To reduce the list, enter a partial user ID in the **Filter** field and click **Filter**.



3. Click **Select Available User**.

   The Approval User Admin - Select User page opens.
4. As needed, use the filter field to narrow the scope of the list:

   a. Type a partial name to filter the list to a subset of user IDs.

   b. Use a percent sign (%) as a wild card to match zero or more characters following the string that you type.

   c. Click **Filter** after you enter the filtering criteria.

   Adjust the number of rows that appear by typing a number in the box provided and clicking **Apply**.
5. In the list of MarkView users, click the user to assign as an approval user.

   Selecting the user returns you to the Approval User Admin page, where the user name appears the User ID field.
6. Enter the user's email address.
7. Click **Insert**.

   The user becomes available for inclusion as part of an approval hierarchy. The user ID no longer appears in the list of available MarkView users.

Update approval users

1. Log in to MarkView and navigate to **Administration** > **Approval Hierarchy Admin**.
2. Select the **Approval User** tab.
3. In the list on the Approval User Admin page, locate the user to update and click the **Update** link to the right of the user.
   The **Approval User Admin - Update** page opens.
4. On the update page, change the user’s email address.
5. Click **Update**.

Delete approval users

1. Log in to MarkView and navigate to **Administration** > **Approval Hierarchy Admin**.
2. Select the **Approval User** tab.
3. In the list on the Approval User Admin page, locate the user to delete and click the **Delete** link to the right of the user.
   The **Approval User Admin - Delete** page opens.
4. Confirm the deletion by clicking **Delete**.
   The user ID returns to the pool of available MarkView users.

Create hierarchies

A user hierarchy associates a M user to an Organization and job title, allocates an approval limit, and optionally assigns a supervisor. Each level in a hierarchy requires you to complete a 2-step process.

1. Log in to MarkView and navigate to **Administration** > **Approval Hierarchy Admin**.
2. Select the **User Hierarchy** tab.
   The **User Hierarchy Admin - Insert (Step 1 of 2)** page opens.
3. To complete step 1:
   a. Select an **Org Name** in the list.
   b. Select a **Job Title** in the drop-down list. The job title must be authorized for the selected Organization, and there must be an assignment available for the job title.
   c. Click **Next**.
      The **User Hierarchy Admin** page opens.
4. To complete step 2:
   a. Select the Supervisor, if applicable, appropriate for the Job Title selected previously.
      If only one person qualifies as a supervisor, the field is preselected. Each selection identified the MarkView user ID, job title, and approval limit.
   b. Click **Select User** to open the **Approval Hierarchy Admin - Select User** page.
      The list displays all approval users in the selected job who are not yet assigned. Clicking a user ID in the list populates the **User** field and associates a MarkView user ID with the job.

c. Enter a positive number that represents a whole currency amount to assign an Approval Limit to the user. The amount cannot be greater than the approval limit of the supervisor.

d. Click **Insert**.

   If no conflicts exist between users and job assignments in the Organization, the new user hierarchy is created.

Maintain an approval hierarchy

Hierarchy maintenance consists of updating the supervisor, user, and the user's approval limit, as appropriate, for the selected job and Organization. Maintenance also involves the deletion of job assignments, and an assignment hierarchy, where a supervisor assignment and all subordinate assignments are removed.

Find an approval hierarchy

1. Log in to MarkView and navigate to **Administration** > **Approval Hierarchy Admin**.
2. Select the **Query Hierarchy** tab.
   The Query Hierarchy page opens.
3. Enter selection criteria:
   a. Select search criteria for any or all of the respective categories: Org Name, Job title, User ID by clicking the respective button and selecting in the available lists.
   b. Select **Maximum Depth** in the list, where the number selected represents the depth of the hierarchy to display relative to the selected Job Title or user ID.
      - When searching by Job Title, depth is displayed for both upward and downward directions in the hierarchy.
      - When searching by User ID, the depth displayed is relative to the selected user and subordinates. For example, if you select a maximum depth of 3, the displayed hierarchy shows the selected user, any subordinates, and any subordinate subordinates.

      The default for Maximum Depth is "all."
4. Click **Query**.
   The Query Hierarchy page is refreshed to show the results of the query.

Update an hierarchy

1. Find an hierarchy.
2. In the query results list, click the **Update** link to the right of the hierarchy to update.
   The **User Hierarchy Admin (Step 2 of 2)** page opens.
3. Change the Supervisor, User, and Approval Limit, as appropriate.
4. Click **Delete**.
   The list displays the updated hierarchy.

Delete a job assignment

1. Find an hierarchy.
2. In the query results list, click the **Delete** link to the right of the job to delete.
   The **User Hierarchy Admin - Delete** page opens.
3. Confirm the deletion by clicking **Delete**.
   The deletion releases the user ID and a job assignment (count) back to the pool of availability for use in other hierarchies within the Organization.

   You cannot delete a supervisor who has subordinates assigned.

Delete a job assignment and subordinate assignments

1. Find an hierarchy.
2. In the query results list, click the **Delete Hierarchy** link to the right of the job hierarchy to delete.
   The **User Hierarchy Admin - Delete Hierarchy** page opens.
3. Confirm the deletion by clicking **Delete**.
   The deletion releases the user ID, a job assignment (count), and subordinate job assignments back to the pool of availability.

Assign a different user to a job

1. Find a job.
2. Click the **Update** link for the job.
3. Click **Select User** to display the list of available users, and select the User ID of the user to assign to the job.
4. Click **Update**.

Delete user association to a job

1. Find a job.
2. Click the **Delete** link next to the user association.
3. Confirm the deletion by clicking **Delete**.

Change the supervisor/subordinate relationship

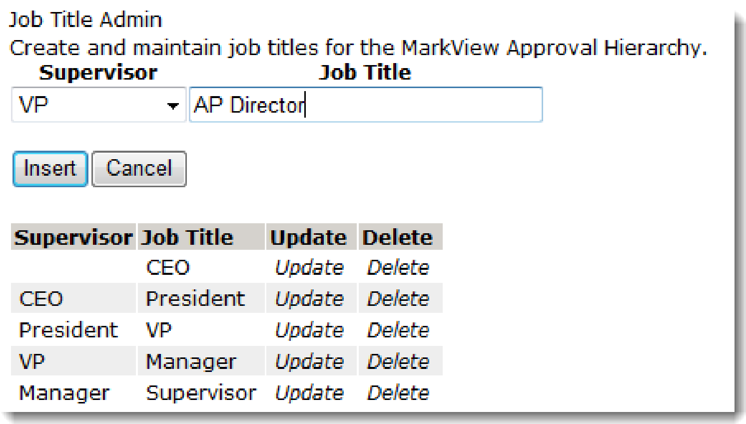
1. Log in to MarkView and navigate to **Administration** > **Approval Hierarchy Admin**.
2. Select the **Job Title** tab.
3. In the **Job Titles** list, click the **Update** link for the job.
4. On the Update page, select a new supervisor in the list.
5. Click **Update**.
6. To reassign jobs affected by the change, select **Query Hierarchy** and update the affected jobs.

Update an approval limit for a job

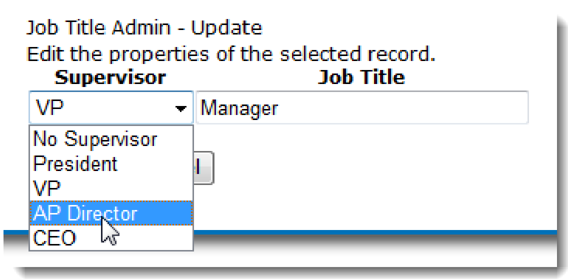
1. Find a job.
2. Click the **Update** link for the job to change.
3. Change the approval limit.
   An approval limit of a subordinate cannot exceed that of the supervisor.
4. Click **Update**.

Add a new level in a hierarchy

1. Log in to MarkView and navigate to **Administration** > **Approval Hierarchy Admin**.
2. Select the **Job Title** tab.
3. Create a job title for the new level to add to the approval hierarchy.
   For example, create an AP Director who will report to the VP. The VP wants the managers who currently report to the VP to report the AP Director.



4. Click **Insert**.
   The new position appears in the job title list.
5. In the job list, locate the Manager job title and click **Update**.
6. Change the Manager's supervisor from the VP to the AP Director and click **Update**.



7. Select **User Hierarchy**.

8. On the first Insert page, select the Org Name where the new job title belongs, select the new job title, and click **Next**.
9. On the second Insert page:
    a. Select the supervisor to whom the new job title reports.
    b. Click **Select User** and select the user who will fill the new job title.
    c. Specify an approval limit, if appropriate.
    d. Click **Insert**.
10. Use the **Query Hierarchy** feature to perform a query on the job title you created. Update the supervisor assignments for all users who will report to the new job title.

Chapter 14

Maintain MarkView add-on products

This section describes how to set up and maintain optional MarkView products, and answers the following questions.

- How do I set up and configure the Self-Service Invoice application?
- How do I set up MarkView to print batches of invoices?

Set up MarkView Export Server

This chapter describes how to set up Export Server instances in MarkView, including setting up one to handle batch print requests.

Setting up MarkView Application Server Export Server enables employees to:

- Email a PDF or TIFF image from the viewer to a user outside of MarkView
- Apply the Return to Supplier action to email a PDF to the supplier.
- Write PDF or TIFF copies of MarkView documents to a local file system.
- Create batch print jobs.

To let employees see the email button in the viewer and allow them to send email, verify the following preferences are set to TRUE:

- VIEWER_INCLUDE_EMAIL
- VIEWER_INCLUDE_PDF_EXPORT

Configure an export server

An export server is an application server servlet with access to an SMTP server. The MarkView installation process adds a default export server (DEFAULT_EXPORT_SERVER) and export queue (DEFAULT_EXPORT_QUEUE), which you can use with minimal configuration changes.

Use MarkView Administration to modify or add an export server. Adding a server creates a record and registers the server with database objects. After adding an export server, also add an export queue.

Assigning the export queue to the export server allows the components to communicate with each other and for items in the queue to be recognized for processing.

Add an export queue

1. Log in to MarkView and navigate to **Administration** > **MarkView Admin**.
2. Select the **Export Queues** tab and click **Add**.

3. Enter a **Queue Name** and **Description**.
4. Click **Save**.

Add an export server

1. Log in to MarkView and navigate to **Administration** > **MarkView Admin**.
2. Select the **Export Servers** tab and click **Add**.
3. Enter a **Server Name** and Description.
4. Enter the **Location**.
5. Click **Save**.
6. Assign the server to the Export Queue you created as follows:
    a. Select the **Queue Assignments** tab.
    b. Complete the fields as follows.

Field	Description
Queue Name	Enter the name of the export queue or click **Select Export Queue** to select a queue from the list.
SMTP Address	Enter the SMTP address of the SMTP server that you use to send exported document images. This applies only if this Export Server instance is also handling email requests.
Priority	Reserved for future use.
Servlet Address	Enter the URL location of the MarkView Export servlet. The URL must be in the following format: http://server:port/viewer/view/exportDocument
Servlet Username	Enter the user name that MarkView uses to identify itself to the servlet, or click Select User Profile to select a user from the list. This user must be able to authenticate against the MarkView schema. This user must have optional access to any views and document types for export, for example, ADMIN.
SMTP User	Enter the user name if you use mail authentication on the SMTP server.
SMTP Password	Enter the password associated with the SMTP User for mail authentication on the SMTP server.
Confirm SMTP Password	If you enter a password, retype the password for verification.

7. Click **Save**.

Batch printing

The batch printing option enables employees to print some or all of the documents displayed in a Web Inquiry page.

Setting up an instance of MarkView Export Server as a batch print server involves:

- Setting up an export server and queue (see Configure an export server)
- Setting up a print server and queue (see Set up a print server)

- Assigning the export queue and the print queue you added to the print server (see Assign the queues to the print server on page 173).
- Setting the MVT_WIQ_API_BATCH_PRINT preference to a value such as ALL. By default, batch printing is disabled.

If a single server reaches maximum capacity, have the system administrator scale the number of JVMs per server or use clusters across servers.

Set up a print server

Add a print server

1. Log in to MarkView and navigate to **Administration** > **MarkView Admin**.
2. Select the **Print Servers** tab and click **Add**.
3. Enter a <Server Name> and <Description>.
4. Enter the <Location> of the server.
5. Click **Save**.

Add a print queue

1. Log in to MarkView and navigate to **Administration** > **MarkView Admin**.
2. Select the **Print Queues** tab and click **Add**.
3. Enter a <Queue Name> and <Description>.
4. Click **Save**.

Assign the queues to the print server

1. Log in to MarkView and navigate to **Administration** > **MarkView Admin**.
2. Select the **Print Servers** tab.
3. Locate the **Print Server** and click the **Details** button next to the server name.
4. Select the **Queue Assignments** tab and click **Add.**
5. Complete the fields as follows:

Field	Description
Queue Name	Enter the name of the print queue, or click **Select Print Queue** to select a queue from the list.
Printer Name	Add the printer name, which must include the full path by which the printer is known on the machine where **Document Export** is running.
Priority	Reserved for future use.
Export Queue Name	Enter the name of the export queue, or click **Select Export Queue** and select a queue from the list.

6. Click **Save**.

Associate only one Print Server and one printer per print queue. Otherwise, the Export Server cannot handle print requests.

MarkView DTM

MarkView Document Transport Module (DTM) provides a secure means to transport image information from your database to the document server.

Use the information in this chapter to modify the authorization method that the system uses.

For information about maintaining DTM, see *MarkView Administrator's Guide, Volume 2*.

Configure DTM for the application server

After installing MarkView DTM, configure database preferences to enable communication between DTM and the database server. For information about these preferences, which begin with MVAS_DTM, see MarkView DTM preferences on page 241.

The installation process sets defaults for most of these preferences, which you can review and modify as needed to optimize performance.

Volume path setup

The volume path ties the logical volume where MarkView document pages reside to an access platform and the associated workstation. The workstation is a client machine or other component seeking document access. The combination of these values determines access to and location of MarkView documents.

Set the volume path for DTM

1. Log in to MarkView and navigate to **Administration** > **MarkView Admin**.
2. Select the **Platforms** tab.
3. Locate the platform to map (for example, HTTPS_TO_DTM), and click the **Details** button next to the name.
4. Select the **Volume Paths** tab and click **Add**.
5. Click **Select Volume** and select the volume path to add.
6. Enter the **Path** URL using the following format:

   dtm:https://<server:port>/<mvasdtm/markview>

   Where server:port is the URL of the application server process, and mvasdtm/markview is the root of the DTM map location.

   > Use the prefix dtm for the path.

7. Click **Save**.

Set up a workstation for applications

You can set up any number of workstations to allow DTM to communicate with different applications.

1. Log in to MarkView and navigate to **Administration** > **MarkView Admin**.

2. Select the **Workstations** tab.
3. Click **Add** and complete the page as follows:
   a. Enter a descriptive workstation name.
   b. Enter a serial number, for example, WEB_CLIENT. This value maps to the WEBCLNT_WKSTN_SERIAL_NO preference.
   c. Click **Select Platform** and select HTTPS_TO_DTM from the LOV.
4. Click **Save.**

Configure the volume path for Document Server

1. Log in to MarkView and navigate to **Administration** > **MarkView Admin**.
2. Select the **Platforms** tab.
3. If you plan to store the documents on the file system, specify the document server for your operating system:
   - UNIX: Click **Details** next to UNIX_FS_TO_DOC_SERVER.
   - Windows: Click **Details** next to WINDOWS_FS_TO_DOC_SERVER.
4. If you plan to store the documents using network transfer protocol, select one of the following document servers and click **Details**:
   - FTP_TO_DOC_SERVER
   - HTTP_TO_DOC_SERVER
   - HTTPS_TO_ DOC_SERVER

   > If you plan to store the documents on HTTP or HTTPS server, create the `x/x/x/x/` directory structure,
   > where `x` is a numeric value from 0 to 9 with each folder containing 10 subfolders.
   > For example, the full paths of the saved documents will be as follows:
   > http://docserver:welcome01@engrhel5.kofax.com:8080/0/0/0/0/00000000.tif
   > http://docserver:welcome01@engrhel5.kofax.com:8080/0/1/7/1/00000171.tif
   > http://docserver:welcome01@engrhel5.kofax.com:8080/9/9/9/9/00009999.tif

5. Select the **Volume Paths** tab.
6. Locate the volume (for example, PRODUCTION), and click the **Details** button next to the name.
7. In the **Path** field, specify the path:
   - UNIX_FS_TO_DOC_SERVER: Set Path to a local directory, for example, `/export/home/working_dir/kofaxmarkview/docserver/`
   - WINDOWS_FS_TO_DOC_SERVER: Set Path to a local folder, for example, `C:\kofaxmarkview\docserver\`
   - FTP_TO_DOC_SERVER: Set Path to the FTP Server, for example, `ftp://docserver:welcome01@engrhel5.kofax.com/`
     where `docserver:welcome01` is the login and password to the http server
   - HTTP_TO_DOC_SERVER: Set Path to the HTTP Server, for example, http://docserver:welcome01@engrhel5.kofax.com:8080/

where `docserver:welcome01` is the login and password to the http server, and `engrhel5.kofax.com:8080/` is http server url

- HTTPS_TO_DOC_SERVER: Set Path to the HTTPS Server, for example, https://docserver:welcome01@engrhel5.kofax.com:8080/

  where `docserver:welcome01` is the login and password to the https server, and `engrhel5.kofax.com:8080/` is https server url

8. Click **Save**.

Set up a workstation for the platform

1. Log in to MarkView and navigate to **Administration** > **MarkView Admin**.
2. Select the **Workstations** tab.
3. Click **Add** and complete the pages as follows:
   a. Enter a descriptive workstation name.
   b. Enter a serial number, for example, MVAS_DTM_1. This value maps to the MVAS_DTM_WORKSTATION_SERIAL_NO preference.
   c. Click **Select Platform** and select the server where you plan to store the documents. For example, select UNIX_FS_TO_DOC_SERVER, WINDOWS_FS_TO_DOC_SERVER, HTTP_TO_DOC_SERVER, or FTP_TO_DOC_SERVER.
4. Click **Save.**

Authorize the document types

1. In MarkView Administration, locate the volume with path that you set and click **Details.**
2. Select the **Document Type Auths** tab.
3. Add or edit the document types to authorize for this volume.
4. Click **Save.**

Self-Service Invoice

Self-Service Invoice (SSI) enables MarkView users to generate invoices from their desktops. The invoices go to the Accounts Payable department, where they are imported into the Oracle E-Business Suite Accounts Payable module. SSI includes a best practices workflow that guides the created invoices through the appropriate processes and payment channels.

> The instructions in this section assume that you have installed and configured MarkView for Accounts Payable and SSI according to the instructions in the *Kofax MarkView Installation Guide* or *Kofax MarkView Upgrade Guide*.

Access SSI administration windows from MarkView home, by selecting **Administration** > **Module Admin** > **Organization** > **Self-Service Invoice**, where Organization could be Global Configuration or configuration for an Organization.

Changing global settings changes system-level values. If an Organization has values set, the Organization settings override the global settings. As a best practice, use global settings for default values shared by most organizations. Use organization-level settings to customize values different from the defaults.

The SSI administration windows list these options:

- Invoice Header Fields and Invoice Line Fields- See Set Invoice Header and Line fields on page 177.
- Invoice Header DFF Fields and Invoice Line DFF Fields- See Managing Descriptive Flexfields (DFFs) on page 179.
- Follow-Up Document Submission See Manage follow-up documents on page 179.

For information about setting SSI preferences, see MarkView Self-Service Invoice preferences.

Set Invoice Header and Line fields

The configuration settings on the Module Administration pages control which fields are visible on the SSI Invoice and Invoice Line user windows. You can set both global values and organization-specific overrides. The Administration pages show:

Description
A description of the field. This matches the field name on the SSI user window.

Show/Hide
Indicates whether the field appears on the SSI user window. The Show/Hide field is not updated to show the result of the join point call; it always shows the value defined in the configuration UI.

Customized?
The join point type for any field customization.

Click **Update** to enable the Show/Hide settings for your organization. You cannot edit certain fields like Invoice Amount which are always on the SSI user windows.

The format of the Date fields is based on the date format set in MarkView.

SSI Invoice Header and Line fields

These are the default values for the Invoice Header and Invoice Line fields. Use the SSI interface to configure which optional fields are visible on the SSI user interface:

Default Invoice Header Settings

Description	Definition	Show/Hide
Approver	The name of the Accounts Payable user who will verify that this invoice is payable after it is submitted.	Show

Description	Definition	Show/Hide
Auto-Calculate Tax	Optional. Auto Calculate Tax specifies that Oracle automatically calculates the tax amount for this invoice.	Show
Description	An optional description that will appear in the header for this invoice. Although Description always appears, this field can be left blank.	Show*****
Exchange Rate	The exchange rate used for payment calculations.	Hide
Exchange Rate Date	The date associated with this exchange rate.	Hide
Exchange Rate Type	Additional information about the exchange rate.	Hide
Invoice Amount	The total cost for this invoice.	Show*****
Invoice Currency	The currency for the charges on the invoice.	Show
Invoice Date	The date on which the invoice was issued.	Show*****
Invoice Number	The unique invoice number. The system may generate a default value.	Show*****
Invoice Received Date	The date on which the invoice was received.	Hide*****
Pay Alone	Optional. Specifies that only one check should be issued for this invoice. Otherwise, this invoice may be paid in a batch with other invoices for this supplier.	Hide
Pay Group	Optional. The group with which this invoice is associated. In most cases the pay group determines when and how the invoice is paid.	Hide
Payment Currency	The currency used to pay the invoice.	Show
Payment Method	The method used to pay the invoice.	Hide
Terms	The terms for payment of the charges on this invoice.	Hide
*Not editable.		

Default Invoice Line Settings

Description	Definition	Show/Hide
Account	The payment account for this invoice.	Show
Accounting Date	The date the invoice was entered into accounting. This date can differ from the Invoice Date.	Show*****
Description	The optional user-supplied description of the line item. For example, "laser printer".	Show*****
Distribution Amount	The <cost> of the distribution for this invoice line. The field name displays the currency for this invoice.	Show*****
Distribution Set	The name of this distribution.	Show
Line Set	The list of line items and relative percentages for this distribution.	Show*****
Project Master lines	Additional custom fields.	Hide
*Not editable.		

Descriptive Flexfield pages

Descriptive Flexfields (DFFs) collect additional information during invoice entry as part of the invoice header or invoice line. DFFs are specific to your organization; the pages you see may not include any DFFs. For more information about entering data into the DFFs for your organization, contact your Accounts Payable department.

Managing Descriptive Flexfields (DFFs)

DFFs are optional invoice header or invoice line fields to collect additional information during invoice entry. DFFs are specific to your organization and are set up by your Accounts Payable Department in Oracle.

To show or hide individual DFFs on the SSI user screens:

1. On the SSI administration screen, click either **Invoice Header DFF Fields** or **Invoice Line DFF Fields**.
   The **DFF Configuration** window opens and lists the available DFF fields and their current Show/Hide settings.
2. Click **Update** to open the **Update SSI DFF Configuration** window.
3. Edit the Show/Hide settings for each DFF.
4. Click **Update** to save the new settings or click **Cancel** to return to the **DFF Configuration** window.

Tax fields

The SSI_TAX_ENTRY_MODE preference controls the type of tax fields that appear on the SSI user windows. See MarkView preferences on page 201 for information about maintaining preferences. See MarkView Self-Service Invoice preferences for more information about the tax fields.

Manage follow-up documents

Depending on your configuration, an SSI user can submit follow-up documents via Scan or Email.

> Although the Fax option is still seen in the UI, it is deprecated. Only Scan and Email settings are used.

If Enable Fax/Scan or Enable Email is set to Yes, MarkView stores these values:

Scan Text

Specifies the message name that contains the default instructions for scanning follow-up documents. The default message name is COVER_PAGE_FAX_SCAN_TEXT_DEFAULT. See Update Scan and Email instructions on page 180 for information about changing the message text.

Email Text

Specifies the message name that contains the instructions for sending follow-up documents in an email message. The default is COVER_PAGE_EMAIL_TEXT_DEFAULT. See Update Scan and Email instructions on page 180 for information about changing the message text.

Email Address

Specifies the default email address for follow-up document submission. The email address is stored in the SSI_EMAIL_ADDRESS preference. See Change preference settings on page 198 for information about changing the email address preference setting.

In the SSI administration windows, click **Follow-Up Document Submission** to open the SSI Configuration for Follow-Up Document Submission window and review the current settings.

MarkView Self-Service Invoice system requirements for email submission

If you plan to enable MarkView Self-Service Invoice (SSI) users to submit follow-up documents in email messages, Kofax Import Connector (KIC) must be installed with the MarkView system and the SSI user's client machine must have an email client installed.

Enable Scan or Email

1. In the **SSI Configuration for Follow-Up Document Submission** window, click **Update**.
   The **Update SSI Configuration for Follow-Up Document Submission** window opens.
   You see these fields:
   - **Enable Fax/Scan**: Specifies whether a user can submit follow-up documents via scan. The default setting is **Yes**.
   - **Fax/Scan Text**: Specifies the message name that contains the Scan instructions. The default is **COVER_PAGE_FAX_SCAN_TEXT_DEFAULT**.
   - **Enable Email**: Specifies whether a user can submit follow-up documents in email messages. The default setting is **No**.
   - **Email Text**: Specifies the message name that contains the Scan instructions. The default is **COVER_PAGE_EMAIL_TEXT_DEFAULT**.
2. Select the correct values from the lists and click **Update** again to save the settings.
   The **SSI Configuration for Follow-Up Document Submission** window reopens.

See Update Scan and Email instructions on page 180 for information about changing the text of the instruction messages.

Update Scan and Email instructions

1. In the **SSI Configuration for Follow-Up Document Submission** window, click **Update Scan and Fax Instructions** or **Update Email Instructions**.
   The **Messages > List** window opens and shows the current Instruction message information.
2. Click **Details** to edit the message.
3. Select the **Message Text Translations** tab and click **Details**.
4. Select the language to use, for example, select **American** for American English.
5. In the **Text Translation** text box, enter the Scan instructions:
   a. To add text, enter the message text.
   b. To add the invoice number to an email message, include the attribute {invoice_number}.
6. Click **Save**.

The new message appears in the **Message Test Translations > List**. When you return to the**SSI Configuration for Follow-Up Document Submission** window, you see the updated text.

Maintain supplier information

Your company must choose a strategy for maintaining supplier information such as company name and addresses:

- Your team can allow self-service invoice creators to request the addition or modification of supplier information. The Accounts Payable department approves and makes the changes or denies the request.
- Your team can keep self-service invoice creators from requesting the addition or modification of supplier information. Using this option implies that another organization, such as the Accounts Payable department, maintains supplier information.

If invoices come from a new supplier or new supplier sites where an established purchase agreement or supplier setup has not been made, allowing invoice creators to add or modify supplier information can streamline supplier maintenance.

If SSI invoice creators cannot find a Supplier or Supplier Site, or if Supplier data has changed, they can submit create or update requests when they create invoices. The MarkView workflow routes the supplier and invoice information to Supplier Maintenance personnel. The Supplier Maintenance personnel can update the Supplier data and return the invoice to the invoice creators with instructions for using the new supplier information and resubmitting the invoice. For companies with frequent supplier maintenance issues, this workflow processing is typically much faster than out-of-band, manual correspondence.

For companies with mostly established suppliers, SSI can be configured to not allow Supplier Maintenance Requests and instead maximize the simplified invoice entry user interface.

Chapter 15

Migrate environments

Migrate your MarkView production environment to a non-production environment to test new functionality, train new users, or troubleshoot issues which you might encounter in your production environment. Use a third-party tool to clone the MarkView production database. Then, use the MarkView Migration utility to generate an SQL script to update the environment-specific MarkView URLs and design-time data on the non-production environment.

Also, you can use the MarkView Migration utility to move to a new application server without upgrading MarkView.

To migrate Kofax Analytics for MarkView from a production to non-production environment, additional setup is required. For more information, see the *Kofax Analytics for MarkView Administrator's Guide*.

- **Migrating Data to Existing Non-Production Environments**: If you already have a functioning non-production environment, refresh the database with a more recent copy of the production environment. See Migration Utility: Configure an existing non-production environment.
- **Migrating Data to New Non-Production Environments**: To migrate data to a new non-production environment, see Refresh a new non-production environment on page 184. To configure a new non-production environment, see the *Kofax MarkView Installation Guide* or *Kofax MarkView Upgrade Guide*.

Migration Utility: Configure an existing non-production environment

Follow these steps before you use the Migration Utility:

1. Copy your production database schema to your non-production database.
2. Copy your production document server to your non-production document server.
3. Log in to a working MarkView environment (for example, your production environment) as an Administrator who is a member of the MODULE ADMINISTRATOR group.
4. Select **Administration** > **Migration Utility**.

Use the Migration Utility

1. Complete the values for your site using the following information.

Section	Field Name	Description
Application Server Post Migration	**Application Server**	• WebLogic • JBoss (use for WildFly and JBoss EAP)
	Fully Qualified Hostname	Enter the fully qualified hostname of the target application server.
	HTTP Port	Enter the HTTP port of the target application server.
Configuration to be Updated to Reference Application Server Post Migration	**Preferences**	Select to update the MarkView preference URLs to use the target application server.
	Volume Paths	Select to update the MarkView volume paths to use the new application server.
	Volume Path To Leave Open	If you select **Volume Paths**, select the **Volume Path To Leave Open** in the list. Values include: • Close All • DEVELOPMENT • PRODUCTION • TEST
	Menu Items	Select to update the MarkView menu item URLs to use the new application server.
	Export Server Queue Assignments	Select to update the MarkView export queue assignments to use the new application server.
Data Cleanup Tasks	**Enable SSL (HTTPs) on Application Server**	Select to update the MarkView URLs to use HTTPs. This option also generates the SQL to update the WEBCLNT_HTTP_TYPE to the correct value (http or https) depending on whether SSL is enabled.
	SSL Wallet Location	If you select **Enable SSL (HTTPs) on Application Server**, enter the SSL Wallet Location. (Required for SSL wallets only.)
	SSL Wallet Password	If you select **Enable SSL (HTTPs) on Application Server**, enter the SSL Wallet Password. (Required for SSL wallets only.)
	Clear Pending Export Requests	Select to clear the pending export requests.

Section	Field Name	Description
	Route New Mail to Complete Mail Queue	Select to route the new mail items to the Complete Mail queue.
	Override Outbound E-mail Destination	Select to update the MarkView Outbound Destination email address override preference, MVT_TEST_EMAIL_ADDRESS, to use a new email address.
	E-mail Address	If you select **Override Outbound E-mail Destination**, enter the email address (required). The email address must meet the RFC2822 standards for valid syntax. See http://tools.ietf.org/html/rfc2822#section-3.4.1 for more information about the RFC2822 standards.
E-Mail Import Configuration	The fields in this section are no longer supported.	

2. Select **Generate SQL** to generate the script and direct where to save the script.
3. Execute the script against the MarkView schema on the target database.

Refresh a new non-production environment

For information about configuring a new non-production environment, see the *Kofax MarkView Installation Guide* or *Kofax MarkView Upgrade Guide*.

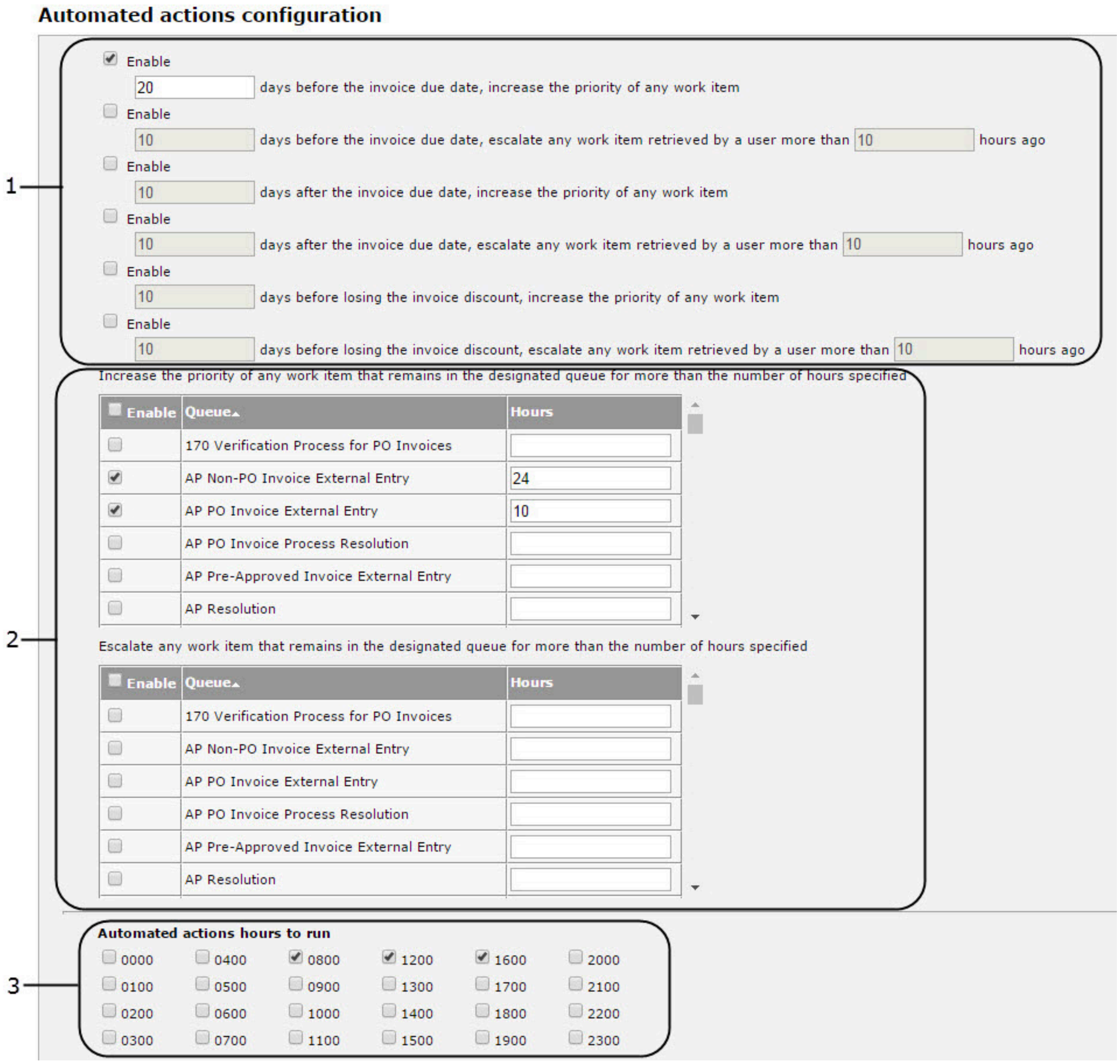
Chapter 16

Automated actions setup

This chapter describes how to configure the system to automate some tasks.

Use the automated workflow actions to manage workflow productivity. The automated actions automatically increase the priority of an invoice or escalate an invoice work item based on particular conditions and are configurable for each workflow queue.

Navigate to Kofax MarkView **Administration** > **Automated Actions** to enable, disable, and configure parameters to define rules that enable MarkView to initiate workflow actions (Escalate) or increase the priority of an invoice (Increase Priority) without any human intervention.



1. Select or clear the required automated action rule to enable or disable parameters.

   If you disable a rule, the inputs associated with that action are disabled. The user cannot enter a value until they select the **Enable** check box. For example, if you select the first check box, the field associated with "days before the invoice due date, increase the priority of any work item" is enabled.

2. Use the provided user interface tables to increase the priority of any work item or escalate any work item that remains in the designated queue for more than the number of hours specified.

   Each table contains all MarkView queues. Enable and disable automated actions for individual queues by selecting or clearing the check box in the first column of the table. If you mark a queue, make sure that you set the value in the **Hours** column for the selected queue.

Otherwise, you will see the error message, after you click **OK**. Select the **Enable** column header check box to mark all queues.

3. Use the "Automated actions hours to run" section to set the time when the system automatically escalates invoices or increases the priority for the invoices that meet the configured criteria.

   In the "Automated actions hours to run" section, the default values for automated actions are 0800, 1200, and 1600 (8am, 12 noon, and 4pm). Select at least one check box in this section. Otherwise, you will see the error message, after you click **OK**.

Chapter 17

User authentication

To validate the identity of users and prevent unauthorized use of a user name, you can authenticate users by using any combination of the methods described in this chapter.

For the authentication feature to work correctly, verify that a user enables browser cookies.

Kofax MarkView supports the following authentication methods:

- Oracle E-Business Suite authentication
- MarkView Internal authentication
- Microsoft Active Directory
- Oracle Internet Directory
- General LDAP Server
- Custom authentication

Oracle E-Business Suite authentication

If you select the Oracle E-Business Suite authentication method, MarkView performs the authentication against Oracle E-Business Suite instance calling the standard FND_WEB_SEC.VALIDATE_LOGIN function.

To configure this authentication method, navigate to **MarkView Admin** > **Preferences** and set the **WEBCLNT_SEC_AUTH_TYPE** preference value to **ERP**. You can set this preference at the system, group, or user level.

MarkView Internal authentication

If you select the MarkView Internal authentication method, MarkView performs the authentication against the internal user database without any calls to external systems.

To configure this authentication method, navigate to **MarkView Admin** > **Preferences** and set the **WEBCLNT_SEC_AUTH_TYPE** preference value to **MV**. You can set this preference at the system, group, or user level.

Microsoft Active Directory

To configure the Microsoft Active Directory authentication method, you must fill in the required fields in **Administration** > **Authentication Configuration** and set the corresponding **WEBCLNT_SEC_AUTH_TYPE** preference value.

1. Log in to MarkView and navigate to **Administration** > **Authentication Configuration**.
2. Select the **Microsoft Active Directory Configuration** tab.
3. Enter values in the following fields:
   - **MSAD Server URL**: Set the URL address of the Domain Controller server, such as:

     `ldap://dc.example.com:389`
   - **Connection user name**: Set the user name used to check the connection to the MSAD server, such as:

     `cn=manager,dc=example,dc=com`
   - **Connection password**: Set the user password used to check the connection to the MSAD server.
   - **Domain Root DN**: Set the root DN for this connection in the following format:

     `cn=Users,dc=example,dc=com`

     The Distinguished Name (DN) attribute refers to a user account and its position in the Active Directory tree hierarchy.
   - **Domain name**: Set the target domain name, such as:

     `example.com`
   - **Connection note**: Enter a short description for the MSAD connection.
4. Use the **Clear Configuration** option to clear the manually entered configuration data and reset the field parameters to the default values.
5. Use the **Test Connection** option to test your system connection using the provided information.
6. Click **Save and Publish** to save the configuration to a database schema and to create the corresponding authentication provider in the MarkView authentication subsystem.

   A message indicates that Microsoft Active Directory was successfully configured.
7. Navigate to **MarkView Admin** > **Preferences** and set the **WEBCLNT_SEC_AUTH_TYPE** preference value to **MSAD**.

   You can set this preference at the system, group, or user level.

Oracle Internet Directory

To configure the Oracle Internet Directory authentication method, you must fill in the required fields in **Administration** > **Authentication Configuration** and set the corresponding **WEBCLNT_SEC_AUTH_TYPE** preference value.

1. Log in to MarkView and navigate to **Administration** > **Authentication Configuration**.
2. Select the **Oracle Internet Directory Configuration** tab.

3. Enter values in the following fields:
   - **OID Server URL**: Set the OID server or servers connection string value, such as:
     `ldap://ldapserver.example.com:389/dc=example,dc=com`
     Use a semicolon (:) as a path delimiter.
   - **Connection user name**: Set the user name used to connect to the OID server, such as:
     `cn=manager,cn=users,dc=example,dc=com`
   - **Connection password**: Set the user password used to connect to the OID server.
   - **User DN(s)**: Set a pattern used to build the user DN, such as:
     `cn={0};uid={0}`
     Make sure that you enter the key {0} that is substituted with the user name. Use a semicolon (;) as a path delimiter.
   - **User Search Base DN**: Set the user search base DN, such as:
     `cn=Users`
     The user search base DN is used to locate a user if a simple bind authentication failed. For example, if you enter a wrong user DN.
   - **User Search Filter**: Set the OID search filter, such as:
     `(&(objectClass=user)(userPrincipalName={0}@example.com))`
     The OID search filter is used to locate a user if a simple bind authentication failed.
   - **Connection note**: Enter a short description for the OID connection.
4. Use the **Clear Configuration** option to clear the manually entered configuration data and reset the field parameters to the default values.
5. Use the **Test Connection** option to test your system connection using the provided information.
6. Click **Save and Publish** to save the configuration to a database schema and to create the corresponding authentication provider in the MarkView authentication subsystem.
   A message indicates that Microsoft Active Directory was successfully configured.
7. Navigate to **MarkView Admin** > **Preferences** and set the **WEBCLNT_SEC_AUTH_TYPE** preference value to **OID**.
   You can set this preference at the system, group, or user level.

General LDAP Server

To configure the General LDAP Server authentication method, you must fill in the required fields in **Administration** > **Authentication Configuration** and set the corresponding **WEBCLNT_SEC_AUTH_TYPE** preference value.

1. Log in to MarkView and navigate to **Administration** > **Authentication Configuration**.
2. Select the **General LDAP Configuration** tab.
3. Enter values in the following fields:
   - **LDAP Server URL**: Set the LDAP server or servers connection string value, such as:
     `ldap://ldapserver.example.com:389/dc=example,dc=com`
     Use a semicolon (:) as a path delimiter.

- **Connection user name**: Set the user name to connect used to the LDAP server, such as:
  `cn=manager,cn=users,dc=example,dc=com`
- **Connection password**: Set the user password used to connect to the LDAP server.
- **User DN(s)**: Set a pattern used to build the user DN, such as:
  `cn={0};uid={0}`
  Make sure that you enter the key {0} that is substituted with the user name. Use a semicolon (;) as a path delimiter.
- **User Search Base DN**: Set the user search base DN, such as:
  `cn=Users`
  The user search base DN is used to locate a user if a simple bind authentication failed. For example, if you enter a wrong user DN.
- **User Search Filter**: Set the LDAP search filter, such as:
  `(&(objectClass=user)(userPrincipalName={0}@example.com))`
  The LDAP search filter is used to locate a user if a simple bind authentication failed.
- **Connection note**: Enter a short description for the LDAP connection.

4. Use the **Clear Configuration** option to clear the manually entered configuration data and reset the field parameters to the default values.
5. Use the **Test Connection** option to test your system connection using the provided information.
6. Click **Save and Publish** to save the configuration to a database schema and to create the corresponding authentication provider in the MarkView authentication subsystem.
   A message indicates that Microsoft Active Directory was successfully configured.
7. Navigate to **MarkView Admin** > **Preferences** and set the **WEBCLNT_SEC_AUTH_TYPE** preference value to **LDAP**.
   You can set this preference at the system, group, or user level.

Custom authentication

If you select the Custom authentication method, MarkView performs the authentication calling a custom PL/SQL function MVW_Authenticate_Custom.Authenticate from the MarkView database schema.

To configure this authentication method, navigate to **MarkView Admin** > **Preferences** and set the **WEBCLNT_SEC_AUTH_TYPE** preference value to **CUSTOM**. You can set this preference at the system, group, or user level.

Chapter 18

Invoice Audit

The Invoice Audit utility processes user-supplied CSV files representing a list of invoices, and batch-prints all associated MarkView documents. The CSV files must be in a specific format. The batch print requests are stored in a special batch print queue so they do not interfere with normal print operations. You can send the printed documents to the appropriate tax authorities or to an independent accountant for review.

If the CSV file refers to an invoice with no attached MarkView document, no document is printed. However, the utility generates a summary message of how many invoices it successfully processed, as well as a detailed list of any invoices it was unable to process. If an invoice has multiple MarkView attachments, the utility prints them all.

If the CSV file includes deleted invoices, Invoice Audit still batch-prints all MarkView documents associated with the deleted invoices.

Configure the Invoice Audit utility

1. Assign users to the INVOICE AUDIT user group. This enables users to access the Invoice Audit utility and all MarkView document types. See Manage MarkView user groups on page 145.

   The next time the users log in to MarkView, they see the **Invoice Audit** utility under **Utilities**.
2. Check the default settings for the new **Invoice Audit** preferences. See MarkView Invoice Audit preferences on page 251.
3. Configure the **Queue Assignment** for the **Print Queue** DEFAULT_BATCH_QUEUE. See Batch printing on page 172.

Invoice Audit CSV file format

The CSV file must contain the following header row and all data rows must match the order of the header row. Capitalization and underscores must all match the data lines. The utility only supports spaces contained in data within double quotes.

```
INVOICE_NUMBER,ORGANIZATION_ID,VENDOR_NAME
```

For example:

```
INVOICE_NUMBER,ORGANIZATION_ID,VENDOR_NAME
"CPS-001","204","Advantage Corp"
"CPS-101","458","G.E. Capital"
```

Invoice Audit security considerations

The INVOICE AUDIT user group automatically grants members the Access Ignore Security privilege for ALL MarkView Document Types in the system.

Invoice Audit performance implications

As a batch processing utility, Invoice Audit can consume considerable system resources while locating and printing invoices. Be aware of this behavior when processing large batches.

Use Invoice Audit

Supply a CSV file through an interface, have the file return a report on what invoices in the CSV can be printed, and batch print those invoices.

Sample Invoice Audit report

```
    1                                 4
Fri Feb 17 10:11:16 EST 2012 imported OracleInvoiceList.csv
=====================================================================================================
1999 of 2000 rows were processed successfully.                                          (2)
=====================================================================================================

ERRORS:

ROW NUMBER INVOICE_NUMBER  ORGANIZATION_ID   VENDOR_NAME  DOC ID     ERROR MESSAGE
=====================================================================================================
3          1900000021      2014              ABC COMPANY             Invalid invoice or no MarkView
                                                                     Documents                (3)
```

1. The date and time when the report ran.
2. The number of invoices successfully processed and the total number of invoice rows in the CSV file.
3. The CSV row for any invoice that was not successfully processed. In this example, row 3 contained invalid invoice information.
4. The name of the CSV file, OracleInvoiceList.csv.

Chapter 19

About MarkView preferences

Preferences let you configure MarkView suite components at the system level, group level, or user level.

You cannot add preferences through MarkView or the Process Monitor using the MarkView Administration. You can only configure Preferences using seed data scripts that come with the MarkView suite or through MarkView API commands.

When you set up the system, the questions that you answer change the settings for most of the preferences that you need. Other types of preferences that you might change include:

- MAIL preferences for email options
- URL preferences to accommodate export configuration changes

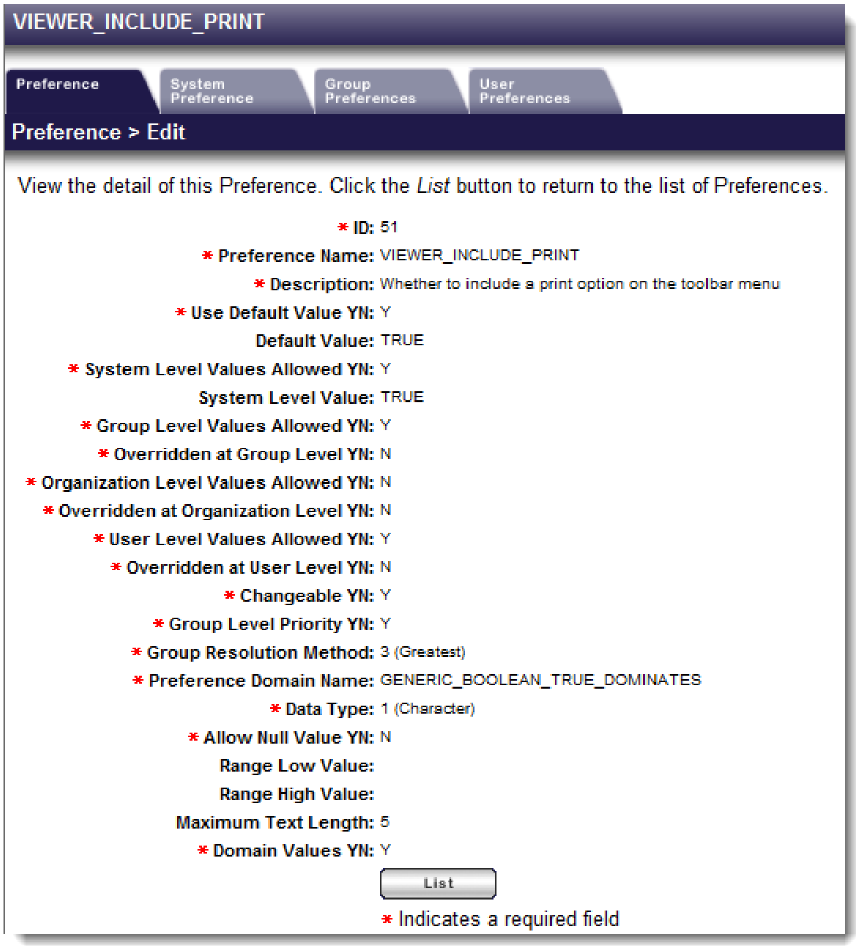
Preference attributes

Preferences configure MarkView characteristics and behavior. Each preference uses attributes that determine how the preference interacts with MarkView.

The attributes displayed in the Details page of MarkView or MarkView Process Administration are set by the MarkView Installation application.

For the best results, leave shipped preferences in their existing configurations.

The following image shows a typical preference and attributes.



MarkView Window for Setting Preference Attributes

ID

The preference ID is an integer used by MarkView to identify the preference. The MarkView installer generates this number, which is visible only in the Administration interface.

Preference Name

The name of the preference, such as VIEWER_INCLUDE_PRINT.

Description

A brief description of the preference and its purpose in MarkView. This field can contain up to 200 characters. For example, the VIEWER_INCLUDE_PRINT description states whether to include a print option on the toolbar menu.

System Level YN

This attribute specifies whether the preference is available at the system level. System level preferences affect all users across the system. Use this attribute to set broad system defaults. If you set this attribute Y, you, as the administrator, can set system-level values. If you set this attribute to N, you cannot set system-level values. In the event of a conflict, group/role and user level preferences override system level preferences.

Group or Role Level YN

This attribute specifies whether or not the preference is available at the MarkView group or role level. Group level preferences affect users in a specific group; role level preferences affect users assigned to a specific role. For example, an AP user group might have preference settings that differ from a Purchasing user group. If you set this attribute to Y, then you, as the administrator, can set different values for different groups or roles. If you set this attribute to N, then you cannot set different preference values for different groups or roles. In cases where a user belongs to multiple groups or is assigned to multiple roles with conflicting preference settings, MarkView resolves the conflict using the Group|Role Resolution Method attribute.

User Level YN

This attribute specifies whether or not the preference is available at the user level. If you set this attribute to Y, then you, as the administrator, can set different values for different users. If you set this attribute to N, then you cannot set different preference values for different users. User level preferences are the most granular level of preference. They affect only a specific user, and they override all group or role level and system level preference settings.

Changeable YN

This attribute specifies whether or not the administrator can edit the preference value. The MarkView installer permanently sets some preference values at installation. If you set this attribute to Y, you can later change the value for this preference at all available levels. If you set this attribute to N, the installer sets a permanent value for this preference.

For example, SCAN_FILENAME_EXT sets the default file extension for MarkView document image files to TIF; this cannot be changed.

Use Default Value YN

Specifies whether or not to use the default preference value if no value is specified for the preference. If you set this attribute to Y, the preference uses the default value specified in the Default Value attribute. If you set this attribute to Y and leave the default value blank, the default value is NULL.

Default Value

If set to Y, the default value derives from this attribute. Default values that the MarkView installer sets are generally either typical values or examples of the correct form for the preference value. Kofax recommends that you leave the default value as an example of the correct form or typical setting for this preference, and apply system wide values using the System Level Value attribute.

System Level Value

Specifies the default system-level value for the preference. If no preference value is set on the System, Group, or User level subtabs, this value is used.

Group or Role Level Priority YN

Value priorities are numeric values attached to each potential preference value. This attribute specifies whether to use the value priorities to resolve group or role level conflicts when you specify a Group|Role Resolution Method attribute of 1 (Value). The MarkView installer specifies value priorities within the database; they are not visible in the Administration interface.

Group or Role Resolution Method

Specifies how to resolve conflicts between group or role level values. When a user belongs to multiple groups or is assigned to multiple roles with different values for the same preference, MarkView resolves the conflict using the method represented by one of the following values:

- 1 (Value): Resolve conflicts by comparing the priority values assigned to the preference values. Use the preference value having the greatest priority value. When the domain is GENERIC_BOOLEAN_TRUE_DOMINATES, use TRUE, as the higher priority value of the two possible preference values TRUE and FALSE, to resolve conflicts.
- 2 (Least): MarkView orders the preference values from low to high based on the ASCII order of the preference value and chooses the lowest value. When the domain is GENERIC_BOOLEAN_TRUE_DOMINATES, use FALSE, as the lower priority value of the two possible preference values TRUE and FALSE, to resolve conflicts.
- 3 (Greatest): MarkView orders the preference values from low to high based on the ASCII order of the preference value and chooses the highest value. When the domain is GENERIC_BOOLEAN_TRUE_DOMINATES, use TRUE, as the higher priority value of the two possible preference values TRUE and FALSE, to resolve conflicts.
- 4 (Random): Of the possible values, MarkView selects one at random. MarkView uses this method of conflict resolution to load balance URL values. When the preference domain is GENERIC_BOOLEAN_TRUE_DOMINATES, random selection between TRUE and FALSE over the course of ten iterations results roughly in five conflicts resolved with TRUE, and five resolved with FALSE.

Preference Domain Name

This attribute specifies the range of acceptable values for the preference. For example, the preference domain ADMIN_ACCESS_SELECT_ALL_NONE allows only three possible values: SELECT, ALL, and NONE. The preference domain LEGACY_FREE_TEXT allows a user-specified text string.

Although preference domain names are generally descriptive, the actual values specified within the domain are defined within the database. To view a preference domain’s allowable values, query your database.

Data Type

This attribute specifies the type of data used to represent the preference value. For example, a preference that specifies a URL would have a Data Type of character. Possible values are:

- 1 (Character): Preference requires alphanumeric values.
- 2 (Number): Preference requires numeric values.
- 3 (Date): Preference requires date values.

Allow Null Value YN

This attribute specifies whether or not the preference can have a null value.

Range Low Value

For preferences that allow free text, this attribute specifies the low end of a range of valid ASCII characters. For example, for a preference that requires a number from 1 to 7, the low end would be 1. You can use ranges to constrain the entry to valid preference values.

Range High Value

For preferences that allow free text, this attribute specifies the high end of a range of valid ASCII characters. For example, for a preference that requires a number from 1 to 7, the high end would be 7. You can use ranges to constrain the entry to valid preference values.

Maximum Text Length

For preferences that take an alphanumeric value, this attribute specifies the maximum number of characters allowed in the preference value. This attribute is applicable to all Data Types. In the case of MVT_ADMIN_COLOR, this attribute is limited to ten, the number of characters needed to spell out the longest possible value.

Domain Values YN

This attribute specifies whether or not the preference is limited to a predefined list of values specified within the preference domain. A preference domain specifies the range of acceptable values for the preference. For example, a URL might allow unrestricted text values, whereas a list of actions would be limited to those that ship with MarkView

Change preference settings

1. Log in to MarkView and navigate to **Administration** > **MarkView Admin**.
2. Select the **Preferences** tab.
3. Search for the preference to change and click **Details** in the preference row.

   The **Details** page opens showing tabs for the level of preference implementation. Not all preferences provide tabs or settings for all levels.

   - **System Preferences**: Affect users system-wide. System preferences override default values.
   - **Group Preferences**: Affect all users in a MarkView User Group. Group preferences override system preferences.

     For example, if a system preference establishes a threshold of 24 hours, a group preference can override the setting and establish a threshold of 12 hours.
   - **Organization Preferences**: Affect all users in an organization. Organization preferences override Group and System preferences.
   - **User Preferences**: Affect the user. User preferences override system, group, and organization preferences.
4. Select the tab for the level of implementation to use and continue as follows:
   - To change a preference, click **Details**, make the changes, and click **Save**.
   - To add a setting, click **Add**, complete the required fields, and click **Save**.

Preferences used by the Application Server may require that you restart the related server for the settings to take effect. For example, Capture and Output preference changes require that you restart the server to take effect.

Preferences used by MarkView home and the database do not require a restart.

If you are unsure about a preference, change the preference in a non-production environment to see if the change takes effect without restarting the service.

Change settings through Organization Setup

The responses that you provide on the Organization Setup Preferences pages may differ from the values shown on the administration preferences tab. For example, the answer to the following question is "yes" or "no." However, the preference value is "TRUE" or "FALSE." If you change the answer to "no," the preference value changes to "FALSE."

- Organization Setup question: 2-Way Matching, PO Invoice: should MarkView enforce additional 2-way match receipting? (Yes, No)
- Preference: MVAP_PO_REQUIRE_RECEIPT_ON_2_WAY_MATCH (TRUE, FALSE)

For information about changing settings through Organization Setup, see Set workflow preferences.

Administration preferences

The ADMIN% preferences configure the MarkView Administration and Administration. The ADMIN_ACCESS% preferences are the subset of ADMIN% preferences that control access to sections of the administration applications. The ADMIN_IMG% and ADMIN_WEB% preferences configure the user interface for the MarkView Administration and MarkView Process Administration Web Edition.

Top-level preferences control access to the corresponding top-level tab (the web page for administering that entity). Detail level preferences control access to the corresponding subtab (the web page for administering that entity). To use a subtab, a user must have SELECT or ALL access to the subtab as well as to its parent top level tab. When a user has only SELECT access to a tab or subtab, the user does not have access to the following buttons: Add, Save, and Delete. When a user with SELECT access drills down to the single document view, no fields can be updated.

As shipped, all ADMIN_ACCESS% preferences have a default of NONE, which means no access. Preferences for the MarkView Web Administrator group, however, are set to ALL or SELECT, on individual ADMIN_ACCESS% preferences. These settings take precedence over the preference definition default value.Kofax recommends that you use group preferences to control administrative access to top-level preferences.

Logging level preferences

Using MarkView preference settings, you can change the logging levels for a number of MarkView components without having to stop and restart the system or a service. After changing and saving the logging level, the new level goes into effect after a few minutes.

Logging level preferences that you can change interactively include the following:

- ABOUT_SERVICE_LOGGING_LEVEL
- ANALYTICS_ACTIONABLE_LOGGING_LEVEL
- ANALYTICS_CORE_LOGGING_LEVEL
- ANALYTICS_MARKVIEW_LOGGING_LEVEL
- CMSYNC_LOGGING_LEVEL
- CORDA_LOGGING_LEVEL
- DOCSERVER_LOGGING_LEVEL
- ERP_ORACLE_LOGGING_LEVEL
- HELP_LOGGING_LEVEL

- MIGRATION_LOGGING_LEVEL
- MOBILE_LOGGING_LEVEL
- MVAS_BCG_LOGGING_LEVEL
- MVAS_DTM_LOGGING_LEVEL
- MVERP_SERVICE_LOGGING_LEVEL
- PLSQLSERVLET_LOGGING_LEVEL
- PROCESS_MONITOR_LOGGING_LEVEL
- SSI_LOGGING_LEVEL
- USERMGMT_LOGGING_LEVEL
- VIEWER_LOGGING_LEVEL

For more information about each logging level preference, see MarkView preferences.

Chapter 20

MarkView preferences

This chapter lists the preferences available to MarkView suite components and solutions. Preferences are listed alphabetically by the affected component. If a component is not installed, you do not have access to the component preferences.

> Do not change the settings for MarkView preferences not described in this chapter without the guidance of a Kofax employee. Doing so can negatively impact system performance and functionality.

MarkView for Accounts Payable preferences

DOCSERVER_LOGGING_LEVEL

Specifies the level of logging to use for tracking activity on the MarkView Document server. Specifies what appears in the docserver.log.

Values: OFF, FATAL, ERROR, WARN (default), INFO, DEBUG, TRACE, ALL

KTM_INVOICE_RECEIVED_DATE

For systems that use Kofax Transformation Modules, configures the setting that MarkView uses as the date when the invoice was received. An empty value is not accepted.

The capture date for invoices processed through Kofax Transformation Modules is the moment when the batch is created.

If an invoice arrives by email and is processed by Kofax Import Connector, you can set the capture date to the date when the email was received. To do so, map the import connector property, KFS:KfxMessageTimePosted, to the Date Received field for the MarkView invoice.

Values:

- Equal to the current date: Uses the current date as the default invoice received date. If the Kofax Transformation Modules server and MarkView are in different time zones, the current date is based on the Kofax Transformation Modules server time zone.
- Equal to the capture date (default): Uses the date when the invoice was captured as the date received.
- Equal to the invoice date: Uses the invoice date as the default date received.

KTM_PO_INVOICE_DELETE_LINEITEMS

Enables deleting records in the LineItems table for PO Invoices in Kofax Transformation Modules.

When you set this preference to TRUE, the invoice PO lines are deleted in the Kofax Transformation Modules Validation module.

You can set this preference at the system level.

Values: TRUE, FALSE (default)

MVAP_ALLOW_COMMENT_ROUTING

When set to TRUE, enables users to route work items for comments using the Request Comment action. This applies only to invoices in the AP Non-PO Invoice workflow.

You can set this preference at the system or organization level.

Values: TRUE (default), FALSE

MVAP_ALLOW_RETURN_ATTACHED

Specifies whether invoices that are already attached can be routed through Returned Invoices processing. Returning attached invoices is possible only for invoices that are still in the Invoice Entry queue. You can set this preference at the system, organization, group, and user levels.

Values: TRUE (default), FALSE

MVAP_ALLOW_ROUTE_TO_PURCHASING

Specifies whether an AP employee can route invoices to the Purchasing group.

You can set this preference at the system or organization level.

Values: TRUE (default), FALSE

MVAP_ALLOW_SFA_REQUEST

Specifies whether an AP employee can request an additional audit step.

You can set this preference at the system or organization level.

Values: TRUE (default), FALSE

MVAP_ALLOW_SPLIT_DURING_DATA_ENTRY

When this preference is set to TRUE, enables users to use the New Document action and the Manual Review Complete action on pages of a multipage document in the following queues:

- Non-PO Invoice Entry
- PO Invoice Entry
- Pre-Approved Invoice Entry
- Supplier Setup Entry
- Attachment Review
- Previously Entered Invoices

These actions let you to break a single document into smaller documents.

You can set this preference at the system or organization level.

Values: TRUE (default), FALSE

MVAP_ALLOW_UNATTACHED_COMMENT

Specifies whether invoice entry users can take the Request Comment action on a work item while it is in the entry queue before a document image is attached to the invoice. When set to TRUE, this preference makes the Request Comment action available.

You can set this preference at the system or organization level.

Values: TRUE (default), FALSE

MVAP_AUTO_RETRIEVE_FOR_OWNER

Specifies whether MarkView for Accounts Payable returns work items to the previous owner’s working folder when an item re-enters the workflow. For example, if a work item is rejected, this preference returns the item to the working folder of the last user who worked with that item. When set to false, this preference sends items re-entering the workflow to the working folder of the next available user.

You can set this preference at the system or organization level.

Values: TRUE, FALSE (default)

MVAP_CHECK_DISTRIB_PREAPP_INV_ENTRY

Determines what conditions a pre-approved invoice must meet before it can accept the Complete Entry action.

You can set this preference at the system or organization level.

Values:

- NONE: Enables an invoice entry user to take the Complete Entry action at any time after the invoice arrives in the user's MarkView Web Inbox.
- FULLYDISTRIBUTED (default): Enables an invoice entry user to take the Complete Entry action if the invoice is fully distributed. To be fully distributed, the total of any distributions on the invoice must equal the total of the invoice.

MVAP_DEFAULT_QA_REVIEW_BY

Specifies whether a group or a user performs the review if the workflow is configured to submit invoices for QA review. By default, QA review is disabled.

You can set this preference at the system or organization level.

Values:

- GROUP (default): Specifies that a group will perform the review. The group must be authorized to retrieve items from the QA required queue. These groups are QA, QA NON-PO, QA PO, and QA PRE-APPROVED.
- USER: Use the MVAP_DEFAULT_QA_REVIEW_USER preference to identify the particular user.

MVAP_DEFAULT_QA_REVIEW_PERCENT

Specifies a percentage of invoices that are randomly submitted if your workflows are configured to submit invoices for QA review. Set this preference at the system, organization, group, and user level. By default, QA review is disabled.

Consider the following if setting this preference at the user level. If someone other than the designated user alerts the AP Determine QA rule, the work item that transitions to the QA Required queue is linked to the user who sent the alert and not to the user set by the preference. The user preference only links the work item to the specified user if that user caused the work item to transition to the QA Required queue.

Values: A number from 0 to 100, no default

MVAP_DEFAULT_QA_REVIEW_USER

Identifies the user to perform the review if your workflows are configured to submit invoices for QA review and the MVAP_DEFAULT_QA_REVIEW_BY preference is set to USER. Set this preference at the system, organization, group, and user level. By default, QA review is disabled.

Values: MarkView User ID, no default

MVAP_DEFAULT_REVIEW_BY

Specifies if a group or a user should perform the review if your workflows are configured to submit invoices for additional review. By default, additional review is disabled.

You can set this preference at the system or organization level.

Values:

- GROUP (default): Specifies those groups authorized to retrieve from the respective queues to which the invoices are submitted for additional review. As shipped, these groups are REVIEW, REVIEW NON-PO, REVIEW PO, and REVIEW PRE-APPROVED
- USER: Use the MVAP_DEFAULT_REVIEW_USER preference to identify the user.

MVAP_DEFAULT_REVIEW_THRESHOLD

Triggers an additional review when an invoice amount exceeds a set threshold (in the prevailing currency), and your workflows are configured to submit invoices for additional review. By default, additional review is disabled.

You can set this preference at the system or organization level.

Values: 999999 (default)

MVAP_DEFAULT_REVIEW_USER

Identifies the user who is to perform the review if your workflows are configured to submit invoices for additional review and the MVAP_DEFAULT_REVIEW_BY preference is set to USER. By default, additional review is disabled.

You can set this preference at the system or organization level.

Values: MarkView User ID, no default

MVAP_EMAIL_OPTION

Specifies how often AP users receive email notifications of work items entering their working folders

Values:

- PER_DAY (default): Users receive an automated email once per day, notifying them of new work items.
- PER_ITEM: Users receive an automated email as each new work item enters their working folders, notifying them of new work items.

MVAP_ENABLE_CONNECTOR_FREIGHT

Specifies whether MarkView Connector passes freight data from Kofax Transformation Modules to the ERP.

You can set this preference at the system or organization level.

Values: FALSE, TRUE (default)

MVAP_ENABLE_CONNECTOR_TAX

Specifies whether MarkView Connector passes tax data from Kofax Transformation Modules to the ERP.

You can set this preference at the system or organization level.

Values: FALSE, TRUE (default)

MVAP_ENFORCE_NEGATIVE_AMOUNT_ROUTING

Works in conjunction with MVAP_HIERARCHY_INVOICE_AMOUNT to specify whether to convert a negative amount to a positive amount.

If the amount determined by MVAP_HIERARCHY_INVOICE_AMOUNT is negative, the MVAP_ENFORCE_NEGATIVE_AMOUNT_ROUTING preference determines whether or not to convert the value. MarkView then compares the value against employee's spend limit to determine if the employee has appropriate approval authority for the invoice.

You can set this preference at the system or organization level.

Values: TREAT AS POSITIVE (default), IGNORE

MVAP_FREIGHT_DEFAULT_ACCOUNT

Specifies the ERP account to which MarkView assigns newly entered freight line items.

You can set this preference at the system or organization level.

Values: A valid ERP accounting code, no default

MVAP_FREIGHT_REVIEW_AMOUNT_THRESHOLD

Triggers a review when the freight amount on an invoice exceeds the set threshold (in the prevailing currency), and your workflows are configured to submit invoices for freight review. By default, freight review is disabled.

You can set this preference at the system or organization level.

Values: A number ≥ 0, no default

MVAP_FREIGHT_REVIEW_BY

Specifies whether a group or a user performs the review if the workflow is configured to submit invoices for Freight review. By default, review is disabled.

You can set this preference at the system or organization level.

Values:

- GROUP (default): Specifies that a group will perform the review. The group must be authorized to retrieve items from the Freight required queue.
- USER: Specifies the user authorized to perform the review. To specify the user, use the MVAP_DEFAULT_FREIGHT_USER_ID preference.

MVAP_FREIGHT_REVIEW_PCT_THRESHOLD

Triggers a review when the freight percentage on an invoice exceeds the set threshold (in the prevailing currency), and your workflows are configured to submit invoices for freight review.

- MarkView calculates the amount in the base/local currency.
- When possible, MarkView considers debit and credit indicators (debit adds amounts; credit subtracts amounts).
- For posted PO and non-PO Invoices, MarkView does not calculate freight.

The percentage is calculated as follows:

Freight Amount/(Invoice Amount – Freight)=%

$16/($100 – $16) =19%

You can set this preference at the system or organization level.

Values: A number from 0 to 100, no default

MVAP_FREIGHT_REVIEW_SAMPLING_PERCENTAGE

Specifies the percentage of invoices to send for random freight review.

You can set this preference at the system or organization level.

Values: A number from 0 to 100, no default

MVAP_FREIGHT_REVIEW_USER_ID

Identifies the user assigned to perform the freight reviews. By default, freight review is disabled. If this preference has no value set, MarkView routes invoices to a user group that can perform the review.

You can set this preference at the system or organization level.

Values: MarkView User ID, no default

MVAP_HIERARCHY_CONTROL

Specifies which positional controls are available to the user based on the context:

- Finding the next approver:
  - If MVERP_HIERARCHY_TYPE is set to ES_BSNS_GRP or ES_ORG, configure this preference to use the appropriate PO control function defined in the Oracle E-Business Suite environment, for example, Approve Purchase Requisitions.
  - If MVERP_HIERARCHY_TYPE is set to ES_SIMPLE, this preference is ignored.
- Approval limit: MarkView uses the value set for MVAP_HIERARCHY_CONTROL to find the approval limit for the specific user.

You can set this preference at the system or organization level.

Values: Approve Purchase Requisitions (default), a string of up to 200 characters from the app table

MVAP_HIERARCHY_INVOICE_AMOUNT

Determines what value is used to represent the invoice amount as referenced in the hierarchy.

You can set this preference at the system or organization level.

Values:

- STANDARD (default): The maximum value between the invoice amount and the sum of invoice distributions is used.
- INVAMOUNT: The invoice amount is used.
- NETAMOUNT: The net invoice amount is used. The net amount is calculated using the following formula: Invoice Amount * (1—[Tax Amount / Invoice Amount])
- SUMDIST: The sum of invoice distributions is used.
- MAXDIST: The maximum amount of a single distribution line is used.

MVAP_HIERARCHY_RULE_LIMIT

Specifies how a user’s spend limit is derived. This limit is compared to the invoice amount specified by the configuration of the preference MVAP_HIERARCHY_INVOICE_AMOUNT.

You can set this preference at the system or organization level.

Values:

- DOCUMENTTOTAL (default): The DOCUMENT_TOTAL signing limits are used.
- FIRSTDIST: The code combination of the first distribution line determines the spend limit the user has on a specific ACCOUNT_RANGE.
- MAXDIST: The code combination of the distribution line with the greatest monetary amount determines the spend limit the user has on a specific ACCOUNT_RANGE.
- CUSTDIST: Not implemented for non-PO invoices
- WEB: Not implemented for non-PO invoices.

MVAP_INCLUDE_COVER_PAGE_ON_RETURN

Specifies whether or not MarkView for Accounts Payable automatically generates a cover page for invoices that are marked Return to Supplier.

Values: TRUE (default), FALSE

MVAP_ITEM_DEFAULT_ACCOUNT

Specifies the ERP account to which MarkView assigns Non-PO Invoice line items.

You can set this preference at the system or organization level.

Values: A valid ERP accounting code, no default

MVAP_NON_PO_APPROVE_QUEUE

Determines which queue Non-PO invoices enter once they are approved.

You can set this preference at the system or organization level.

Values:

- Determine Tax Review Requirement (default): Approved invoices transition to the Determine Tax Review Requirement queue.
- Determine Freight Review Requirement: Approved invoices transition to the Determine Freight Review Requirement queue.
- Determine Review Requirement: Approved invoices transition to the Determine Review Requirement queue.
- Determine QA Requirement: Approved invoices transition to the Determine QA Requirement queue.
- Return Control to ERP: Approved invoices transition to the Return Control to ERP queue.
- Verify AP Process Complete: Approved invoices transition to the verify AP Process Complete queue.

MVAP_NON_PO_APPROVE_REQUIREMENT

Determines the conditions a Non-PO invoice must meet before it can accept the Approve action.

You can set this preference at the system or organization level.

Values:

- NONE: Lets an approver take the Approve action any time after the invoice is in the approver's MarkView Web Inbox.
- DFMPLACED: Although this option appears in the list, it is no longer a valid value.
- FULLYDISTRIBUTED (default): Lets an approver take the Approve action if the invoice is fully distributed. To be fully distributed, the total of distributions on the invoice must equal the invoice total.

MVAP_NON_PO_ENTRY_COMPLETE_QUEUE

Determines where Non-PO invoices enter the workflow once they receive the Complete Entry action.

You can set this preference at the system or organization level.

Values:

- Approval and Coding (default): Work items transition to the Approval and Coding queue. In this configuration, invoice approval and invoice distribution can occur independently of one another.
- Approval: Work items transition to the Approval queue. This scenario assumes that the entry user-coded invoice distributions prior to routing the invoice for approval.
- Coding: Work items transition to the Coding queue. Users must code invoice distributions before the work item can advance in the workflow.
- Verify AP Process Complete: Work items transition to the Verify AP Process Complete queue.

MVAP_NON_PO_FRT_REVIEW_COMPLETE_QUEUE

Determines where MarkView routes Non-PO invoices once they finish Freight review.

You can set this preference at the system or organization level.

Values:

- Determine Review Requirement (default): MarkView determines if the invoice requires Additional review and routes the invoice accordingly.
- Determine QA Requirement: MarkView determines if the invoice requires QA review and routes the invoice accordingly.
- Return Control to ERP: MarkView transitions the invoice to the Return Control to ERP queue when the review is completed.
- Verify AP Process Complete: MarkView transitions invoices that complete the review process to the Verify AP Process Complete queue.

MVAP_NON_PO_QA_COMPLETE_QUEUE

Specifies the queue for non-PO workflow items that completed an additional QA process.

You can set this preference at the system or organization level.

Values:

- Return Control to ERP (default): Work items transition to the Return Control to ERP queue.
- Verify AP Process Complete: Work items transition to the Verify AP Process Complete queue.

MVAP_NON_PO_REVIEW_COMPLETE_QUEUE

Specifies the queue to which reviewed Non-PO work items transition.

You can set this preference at the system or organization level.

Values:

- Determine QA Requirement (default): Invoices that complete the additional review process transition to the Determine QA Requirement queue. In the Determine QA requirement queue, work items are subject to additional QA review.
- Return Control to ERP: Invoices that complete the additional review process transition to the Return Control to ERP queue.
- Verify AP Process Complete: Invoices that complete the additional review process transition to the Verify AP Process Complete queue.

MVAP_NON_PO_TAX_REVIEW_COMPLETE_QUEUE

Determines where MarkView routes Non-PO invoices once they finish Tax review.

You can set this preference at the system or organization level.

Values:

- Determine Freight Review Requirement (default): MarkView determines if the invoice requires Freight review and routes the invoice accordingly.
- Determine Review Requirement: MarkView determines if the invoice requires Additional review and routes the invoice accordingly.
- Determine QA Requirement: MarkView determines if the invoice requires QA review and routes the invoice accordingly.
- Return Control to ERP: MarkView transitions the invoice to the Return Control to ERP queue when the review is completed.
- Verify AP Process Complete: MarkView transitions invoices that complete the review process to the Verify AP Process Complete queue.

MVAP_NON_PO_TRANSITION_ON_ATTACH

When TRUE, transitions Non-PO work items immediately after the document is attached to the ERP record.

Changing this setting without complete and thorough testing could cause all items to route to the workflow administration queue or to get stuck in a single workflow processing queue. Contact Kofax Technical Support for help in updating this preference.

Values: TRUE, FALSE (default)

MVAP_PO_ENTRY_COMPLETE_QUEUE

Determines where PO invoices enter the workflow once they receive the Complete Entry action.

You can set this preference at the system or organization level.

Values:

- Determine Tax Review Requirement (default): Invoices transition to the Determine Tax Review Requirement queue.
- Determine Freight Review Requirement: Invoices transition to the Determine Freight Review Requirement queue.
- Determine Review Requirement: Invoices transition to the Determine Review Requirement queue.
- Determine QA Requirement: Invoices transition to the Determine QA Requirement queue.
- Return Control to ERP: Invoices transition to the Return Control to ERP queue.
- Verify AP Process Complete: Invoices transition to the Verify AP Process Complete queue.

MVAP_PO_FRT_REVIEW_COMPLETE_QUEUE

Determines where MarkView routes PO invoices once they finish Freight Review.

You can set this preference at the system or organization level.

Values:

- Determine Review Requirement (default): MarkView determines if the invoice requires Additional review and routes the invoice accordingly.
- Determine QA Requirement: MarkView determines if the invoice requires QA review and routes the invoice accordingly.
- Return Control to ERP: MarkView transitions the invoice to the Return Control to ERP queue when the review is completed.
- Verify AP Process Complete: MarkView transitions invoices that complete the review process to the Verify AP Process Complete queue.

MVAP_PO_QA_COMPLETE_QUEUE

Specifies the queue for PO workflow items that have completed an additional QA process.

You can set this preference at the system or organization level.

Values:

- Return Control to ERP (default): MarkView transitions invoices to the Return Control to ERP queue.
- Verify AP Process Complete: MarkView transitions invoices to the Verify AP Process Complete queue.

MVAP_PO_REQUIRE_RECEIPT_ON_2_WAY_MATCH

Determines whether the Receipting process is activated. By default, items go through the Receipting process. If the invoice is matched to a PO that has at least one item that is not expecting a receipt, such as a service, the work item is routed to an approver in the Verification Process for PO Invoices queue.

By disabling the system receipt, PO invoices with a 2-way match do not require approval.

Values: TRUE (default), FALSE

MVAP_PO_REVIEW_COMPLETE_QUEUE

Specifies the queue to which reviewed PO work items transition.

Values:

- Determine QA Requirement (default): Invoices that complete the additional review process transition to the Determine QA Requirement queue. In the Determine QA requirement queue, work items are subject to additional QA review.
- Return Control to ERP: Invoices that complete the additional review process transition to the Return Control to ERP queue.
- Verify AP Process Complete: Invoices that complete the additional review process transition to the Verify AP Process Complete queue.

MVAP_POSITIONAL_NAME

Specifies which positional hierarchy to use when a Positional Oracle Purchasing hierarchy is in effect for non-PO approval.

You can set this preference at the system or organization level.

Values: Stores free text values, no default

Use the following query in Oracle Applications to determine supported values:

```
SQL> select name from per_position_structures;
```

MVAP_PO_REQUIRE_RECEIPT_ON_2_WAY_MATCH

Specifies whether a receipt is required when an invoice matches a purchase order. The receipt can serve as documentation that the item or service purchased was delivered.

You can set this preference at the system or organization level.

Values: TRUE (default), FALSE

MVAP_PO_TAX_REVIEW_COMPLETE_QUEUE

Determines where MarkView routes PO invoices once they finish Tax review.

You can set this preference at the system or organization level.

Values:

- Determine Freight Review Requirement (default): MarkView determines if the invoice requires a Freight review and routes the invoice accordingly.
- Determine Review Requirement: MarkView determines if the invoice requires Additional review and routes the invoice accordingly.
- Determine QA Requirement: MarkView determines if the invoice requires QA review and routes the invoice accordingly.
- Return Control to ERP: MarkView transitions the invoice to the Return Control to ERP queue when the review is completed.
- Verify AP Process Complete: MarkView transitions invoices that complete the review process to the Verify AP Process Complete queue.

MVAP_PO_TAX_REVIEW_COMPLETE_QUEUE

Determines where MarkView routes PO invoices once they finish Tax review.

You can set this preference at the system or organization level.

Values:

- Determine Freight Review Requirement (default): MarkView determines if the invoice requires a Freight review and routes the invoice accordingly.
- Determine Review Requirement: MarkView determines if the invoice requires Additional review and routes the invoice accordingly.
- Determine QA Requirement: MarkView determines if the invoice requires QA review and routes the invoice accordingly.
- Return Control to ERP: MarkView transitions the invoice to the Return Control to ERP queue when the review is completed.
- Verify AP Process Complete: MarkView transitions invoices that complete the review process to the Verify AP Process Complete queue.

MVAP_PO_TRANSITION_ON_ATTACH

When TRUE, transitions PO work items immediately after the document is attached to the ERP record.

Changing this setting without complete and thorough testing could cause all items to route to the workflow administration queue or to get stuck in a single workflow processing queue. Contact Technical Support for assistance in updating this preference.

Values: TRUE, FALSE (default)

MVAP_PO_VERIFICATION_USER_DETERMINED_BY

By default, hold reasons on an invoice are processed in the order identified in PO Hold Definition Business Module Administration.

If the same holdblocking reason is identified on two different lines on the same invoice, this preference determines which line to process first.

Setting the value to MAX_DIST_LINE_AMT changes the hold resolution order to resolve the lines that are held because of quantity issues first. Lines with quantity issues are resolved in sequence.

You can set this preference at the system or organization level.

Values:

- MAX_DIST_LINE_AMT (default)
- MIN_DIST_LINE_NUMBER

MVAP_PREAPP_DEFAULT_ACCOUNT

Specifies to which GL Account MarkView assigns captured Pre-Approved Invoice distributions. If set, the value must be a valid GL Account Code combination. If not set, invoice lines without an account at validation are sent to Quick Invoices.

You can set this preference at the system or organization level.

Values: A valid GL Account Code combination, no default

MVAP_PRE_APP_ENTRY_COMPLETE_QUEUE

Determines where Pre-Approved invoices enter the workflow once they receive the Complete Entry action.

You can set this preference at the system or organization level.

Values:

- Determine Tax Review Requirement (default): Invoices transition to the Determine Tax Review Requirement queue.
- Determine Freight Review Requirement: Invoices transition to the Determine Freight Review Requirement queue.
- Determine Review Requirement: Invoices transition to the Determine Review Requirement queue.
- Determine QA Requirement: Invoices transition to the Determine QA Requirement queue.
- Return Control to ERP: Invoices transition to the Return Control to ERP queue.
- Verify AP Process Complete: Invoices transition to the Verify AP Process Complete queue

MVAP_PRE_APP_FRT_REVIEW_COMPLETE_QUEUE

Determines where MarkView routes Pre-approved invoices once they finish Freight Review.

You can set this preference at the system or organization level.

Values:

- Determine Review Requirement (default): MarkView determines if the invoice requires Additional review and routes the invoice accordingly.
- Determine QA Requirement: MarkView determines if the invoice requires QA review and routes the invoice accordingly.
- Return Control to ERP: MarkView transitions the invoice to the Return Control to ERP queue when the review is completed.
- Verify AP Process Complete: MarkView transitions invoices that complete the review process to the Verify AP Process Complete queue.

MVAP_PRE_APP_QA_COMPLETE_QUEUE

Specifies the queue for Pre-Approved workflow items that have completed an additional QA process.

You can set this preference at the system or organization level.

Values:

- Return Control to ERP (default): Invoices transition to the Return Control to ERP queue.
- Verify AP Process Complete: Invoices transition to the Verify AP Process Complete queue.

MVAP_PRE_APP_REVIEW_COMPLETE_QUEUE

Specifies the queue to which reviewed Pre-Approved work items transition.

You can set this preference at the system or organization level.

Values:

- Determine QA Requirement (default): Invoices that complete the additional review process transition to the Determine QA Requirement queue. In the Determine QA requirement queue, work items are subject to additional QA review.
- Return Control to ERP: Invoices that complete the additional review process transition to the Return Control to ERP queue.
- Verify AP Process Complete: Invoices that complete the additional review process transition to the Verify AP Process Complete queue.

MVAP_PRE_APP_TAX_REVIEW_COMPLETE_QUEUE

Determines where MarkView routes Pre-approved invoices once they finish Tax review.

You can set this preference at the system or organization level.

Values:

- Determine Freight Review Requirement (default): MarkView determines if the invoice requires a Freight review and routes the invoice accordingly.
- Determine Review Requirement: MarkView determines if the invoice requires Additional review and routes the invoice accordingly.
- Determine QA Requirement: MarkView determines if the invoice requires QA review and routes the invoice accordingly.
- Return Control to ERP: MarkView transitions the invoice to the Return Control to ERP queue when the review is completed.
- Verify AP Process Complete: MarkView transitions invoices that complete the review process to the Verify AP Process Complete queue.

MVAP_PRE_APP_TRANSITION_ON_ATTACH

When TRUE, transitions pre-approved work items immediately after the document is attached to the ERP record.

Changing this setting without complete and thorough testing can route all items to the workflow administration queue or send them to a single workflow processing queue where they could get stuck. Contact Technical Support for help when updating this preference.

Values: TRUE, FALSE (default)

MVAP_PRE_APPROVED_ALLOW_COMMENT

Allows users to route pre-approved work items for comments using the Request Comment action.

Values:

- TRUE (default): Allows users to route pre-approved work items for comments.
- FALSE: Prevents users from routing pre-approved work items for comments.

MVAP_PREV_ENT_TRANSITION_ON_ATTACH

When TRUE, transitions previously entered work items immediately after the document is attached to the ERP record.

Changing this setting without complete and thorough testing can route all items to the workflow administration queue or to a single workflow processing queue where they can get stuck. Contact Technical Support for help when updating this preference.

Values: TRUE (default), FALSE

MVAP_REVIEW_RECYCLE

When TRUE, turns document recycling into a 2-step approval process. Step 1 requires entry users to take the Request Recycle action on invoices to delete. Request Recycle documents enter the Recycle Bin Review queue.

The Recycle Bin must have sufficient space available.

In this queue, a recycle review user performs step 2 by verifying that the document should be recycled.

If confirmed for recycling, the reviewer takes the Recycle Complete action and sends the document to the Recycle Bin queue.

If denied for recycling, the reviewer takes the Reject Recycle action and returns the document to the Invoice Entry queue.

The default setting requires only that the entry user take the Recycle action to send the document to the Recycle Bin queue.

You can set this preference at the system or organization level.

If you configure the preference for one accounts payable workflow within the system or organization, it applies to all workflows in the system or organization.

Values: TRUE (default), FALSE

MVAP_REVIEW_RETURN

When TRUE, turns invoice returns into a 2-step approval process. Step 1 requires that entry users take the Return to Supplier action on invoices to return. Return to Supplier documents enter the Returned Invoice Review queue.

In this queue, a return review user performs step 2 by verifying that the document should be returned to the supplier.

If confirmed for return, the review user takes the Complete Return to Supplier action, which sends the document to the Returned Invoices queue.

If denied for return, the review user takes the Reject Return to Supplier action, which returns the document to the Invoice Entry queue.

The default setting requires only that the entry user take the Return to Supplier action to send the document to the Returned Invoices queue.

You can set this preference at the system or organization level.

If you configure the preference for one accounts payable workflow in the system or organization, the value applies to all workflows in the system or organization.

Values: TRUE (default), FALSE

MVAP_SUPPLIER_TRANSITION_ON_ATTACH

Specifies whether supplier work items transition immediately after the document is attached to the ERP record.

Changing this setting without complete and thorough testing could route all items to the workflow administration queue or a single workflow processing queue, where it can get stuck. Contact Technical Support for help when updating this preference.

Values: TRUE (default), FALSE

MVAP_TAX_AUTO_CALCULATE_FOR_ORG

Specifies whether or not the ERP calculates the tax. If the Kofax Transformation Modules validation user enables the Autocalculate Tax check box, MarkView ignores this preference.

You can set this preference at the organization level.

Values: True (default), False

MVAP_TAX_DEFAULT_ACCOUNT

Specifies the ERP account to which MarkView assigns newly entered tax line items.

You can set this preference at the system or organization level.

Values: A valid ERP accounting code, no default

MVAP_TAX_REVIEW_AMOUNT_THRESHOLD

Triggers an additional review when the tax amount on an invoice exceeds the set threshold (in the prevailing currency), and your workflows are configured to submit invoices for tax review.

You can set this preference at the system or organization level.

Values: A number ≥ 0, no default

MVAP_TAX_REVIEW_BY

Specifies whether a group or a user performs the review if the workflow is configured to submit invoices for Tax review. By default, review is disabled.

You can set this preference at the system or organization level.

Values:

- GROUP (default): Specifies that a group will perform the review. The group must be authorized to retrieve items from the Tax required queue.
- USER: Specifies the user authorized to perform the review. To specify the user, use the MVAP_DEFAULT_TAX_USER_ID preference.

MVAP_TAX_REVIEW_PCT_THRESHOLD

Triggers an additional review when the tax percentage on an invoice exceeds the set threshold (in the prevailing currency), and your workflows are configured to submit invoices for tax review. By default, tax review is disabled.

MarkView calculates the amount in the base/local currency.

For posted PO and non-PO Invoices, MarkView does not calculate tax.

You can set this preference at the system or organization level.

Tax Amount/(Invoice Amount – Tax)=%

For example, if the product price is $100, the tax is $6 and the total invoice amount is $106, the percent calculation is:

$6/($106 – $6) =6%

Values: A number from 0 to 100, no default

MVAP_TAX_REVIEW_SAMPLING_PERCENTAGE

Specifies the percentage of invoices to send for random tax review.

You can set this preference at the system or organization level.

Values: A number from 0 to 100, no default

MVAP_TAX_REVIEW_USER_ID

Identifies the user to perform the tax reviews. By default, tax review is disabled. If this preference has no value set, MarkView routes invoices to a user group with authorization to perform the review.

You can set this preference at the system or organization level.

Values: MarkView User ID, no default

MVAP_USE_MARKUP_APPROVER

Reserved for future use. Do not change this preference value without explicit instructions from Kofax. When set to TRUE, this preference enables you to select the approver for an Approve action from a list of values.

Values: TRUE, FALSE (default)

MVERP_INITIAL_USER_PASSWORD

Sets the password assigned to users who are created using the MarkView Load User Data utility. For security purposes, change the password value from the default.

Values: WELCOME (default)

MVERP_GETPOLIST_FILTER_CONDITION

Filters the list of POs with Releases returned by the mvapi_erp_po.GetPOHeaderWithReleaseList function. Releases specify the delivery date and quantity for the delivery.

The preference is limited to 2000 characters.

Filter the list by the following set of predefined fields.

- any column of 'po_lookup_codes' table with prefix plc.
- any column of 'po_headers_all' table with prefix poh.
- any column of 'po_releases_all' table with prefix por.

Default value:

```
"poh.type_lookup_code in ('STANDARD', 'BLANKET', 'PLANNED') and poh.pcard_id
is null and (poh.closed_code is null or poh.closed_code != 'FINALLY CLOSED')"
```

To additionally exclude any finally closed Releases from the result set, use the value such as:

```
"poh.type_lookup_code in ('STANDARD', 'BLANKET', 'PLANNED')
and poh.pcard_id is null
and (poh.closed_code is null or poh.closed_code != 'FINALLY CLOSED')
and (por.closed_code is null or por.closed_code != 'FINALLY CLOSED')"
```

You can reduce memory consumption by commenting out unused fields in mvapi_erp_po.GetPOHeaderWithReleaseList.

If you comment out fields, also update the mvapi_erp_po version string to include the word CUSTOM so that Kofax Technical Support knows the package was modified.

By default, only PONUMBER, TYPELOOKUPCODE, and RELEASENUM fields are configured in getPOsAll2tsv.xsl to be used by Kofax Transformation Modules.

MVERP_GETVENDORSITES_FILTER_CONDITION

Filters the list of vendor sites by a set of predefined fields:

vendor_id, vendor_name, enabled_flag, vendor_name_alt, vat_registration_num, invoice_currency_code, tax_reporting_name, num_1099, active_flag, auto_tax_calc_flag, vendor_site_id, vendor_site_code, phone, email_address, address_line1, address_line2, address_line3, city, state, country, zip, org_id, pay_site_flag, inactive_date, bank_account_num, bank_or_branch_number, IBAN.

For example, set up the vendor_id value to filter vendors by ID. Use the single internal quotation marks as follows.

```
vendor_id in (select vendor_id from po_vendors where PAY_GROUP_LOOKUP_CODE not
in
( select lookup_code from apps.fnd_lookup_VALUES where lookup_type =
'MVC_VENDOR_DATA_EXPORT_EXCLUDE' ))
```

MVERP_MAINTENANCE_EMAIL_ADDRESS

Sets an email address as a collection point where the Mail Gateway can send maintenance mail in the absence of a user email address. This is a system-level preference.

Values: A site email address (for example, unknown@dexco.com)

MVERP_HIERARCHY_TYPE

Determines the hierarchy used to derive the next approver to whom the invoice is routed if an approver does not have authority to approve the invoice. An additional option, CUSTOM, is available. For the best results, only use the CUSTOM option under the direction of Technical Support.

You can set this preference at the system or organization level.

Values:

- MarkView (default): The workflow uses the MarkView suite hierarchy.
- ES_SIMPLE: The workflow uses a simple Employee-Supervisor Oracle Purchasing hierarchy. This method uses the default supervisor assigned to the employee.
- POS_SIMPLE: The workflow uses a simple Positional Oracle Purchasing hierarchy. This method assumes that only one employee is assigned to any position and determines the supervisor based on the position of the current employee and the position hierarchy structure.
- ES_BSNS_GRP: The workflow uses a Business Group-dependent Employee-Supervisor Oracle Purchasing hierarchy. This method determines the supervisor for the employee based upon the Business Group of the invoice and the supervisor assigned to the assignment the user has in the specific Business Group.
- ES_ORG: The workflow uses an Org-dependent Employee-Supervisor Oracle Purchasing hierarchy. This method determines the supervisor for the employee based upon the Org ID of the invoice and the supervisor assigned to the assignment the user has in the specific Org ID.
- ES_WEB: The workflow uses a self-service (Web) hierarchy you have configured for use in approving AP invoices. Selecting this option requires changes to the hierarchy custom package, as no ES_WEB hierarchy is configured in the default implementation. Your system integrator can provide additional information.

MVERP_POLIMLOC_FILTER_CONDITION

Contains a boolean expression to filter the list of PO lines in the MVAP_PO_LIM_LOC_MV table returned by the mverp_po.RefreshLimLocTable procedure. The preference can be currently applied to the Oracle EBS systems only and is limited by 2000 characters.

The following set of predefined fields can be used in the expression:

- `any column of 'po_headers_all' table with prefix 'poh.'`
- `any column of 'po_lines_all' table with prefix 'pol.'`
- `any column of 'po_releases_all' table with prefix 'por.'`
- `any column of 'mvt_org' table with prefix 'mo.'`

Default value:

```
"poh.type_lookup_code in ('STANDARD', 'BLANKET', 'PLANNED') "
```

For example, if you want to additionally exclude any closed and finally closed PO lines from the result set, you can use the following value:

```
"poh.type_lookup_code in ('STANDARD', 'BLANKET', 'PLANNED') and
nvl(por.closed_code,'OPEN') not in ('CLOSED','FINALLY CLOSED')"
```

MVERP_USER_INFO_SOURCE

Specifies the source that MarkView uses to retrieve email addresses for the associated user ID. The Email Document feature uses this setting to populate the list of email addresses available for the sending employee to use.

Values: ERP, MarkView (default)

MVT_COVER_PAGE_LOV_MAX_VALUES

Specifies the maximum number of records accessible for supplier LOVs. The system displays an error message if the number of available records exceeds the maximum.

Values: A number

MVT_MAIL_FROM

Specifies an email address to use as the sender of global email reminders sent to users with open items in their working folders. Also used by the Email Document feature if the sender has no email address specified or if a server malfunction prevents the identification of the sender.

This is a system-level preference.

Values:

- An email address for your site (for example, reminder@dexco.com)
- MarkView (default)

MVT_MAIL_FROM_NAME

Specifies a name to use as the sender of global email reminders sent to users with open items in their working folders. This is a system-level preference.

Values: Site name, MarkView (default)

MVT_RE-CREATE_DOCUMENT_PRIORITY_INCREASE

Adjusts the priority of a new work item that an employee creates using the re-create document process. The priority of the new work item is the initial priority of the original work item plus the value specified by this preference.

Values: 5 (default), a numeric value of 0 or higher

MarkView Administration preferences

ADMIN_ACCESS_MV_ATTRIBUTE

Specifies the type of access an administrator has to overall message attribute administration.

Values: ALL, SELECT, and NONE (default)

ADMIN_ACCESS_MV_BAR_CODE_CONF_SEP_TYPE

Specifies the type of access an administrator has to bar code configuration separator type administration.

Values: ALL, SELECT, and NONE (default)

ADMIN_ACCESS_MV_BAR_CODE_CONF_TYPE

Specifies the type of access an administrator has to bar code configuration type administration.

Values: ALL, SELECT, NONE (default)

ADMIN_ACCESS_MV_BAR_CODE_CONFIGURATION

Specifies the type of access an administrator has to bar code configuration administration.

Values: ALL, SELECT, NONE (default)

ADMIN_ACCESS_MV_BAR_CODE_QUEUE
Specifies the type of access an administrator has to bar code queue administration.
Values: ALL, SELECT, NONE (default)

ADMIN_ACCESS_MV_BAR_CODE_QUEUE_ASSIGNMT
Specifies the type of access an administrator has to bar code queue assignment administration.
Values: ALL, SELECT, NONE (default)

ADMIN_ACCESS_MV_BAR_CODE_REQUEST
Specifies the type of access an administrator has to bar code request administration.
Values: SELECT, NONE (default)

ADMIN_ACCESS_MV_BAR_CODE_SERVER
Specifies the type of access an administrator has to bar code server administration.
Values: ALL, SELECT, NONE (default)

ADMIN_ACCESS_MV_COMPONENT
Specifies the type of access an administrator has to message component administration.
Values: ALL, SELECT, NONE (default)

ADMIN_ACCESS_MV_DATABASE_OBJECT
Specifies the type of access an administrator has to view database objects.
Values: SELECT, NONE (default)

ADMIN_ACCESS_MV_DOCUMENT_TYPE
Specifies the type of access an administrator has to document type administration.
Values: ALL, SELECT, NONE (default)

ADMIN_ACCESS_MV_DOC_TYPE_VOLUME_AUTH
Specifies the type of access an administrator has to document type volume authorization administration.
Values: ALL, SELECT, NONE (default)

ADMIN_ACCESS_MV_EXP_QUEUE
Specifies the type of access an administrator has to export queue administration.
Values: ALL, SELECT, NONE (default)

ADMIN_ACCESS_MV_EXP_QUEUE_ASSIGNMENT
Specifies the type of access an administrator has to export queue assignment administration.

Values: ALL, SELECT, NONE (default)

ADMIN_ACCESS_MV_EXP_REQUEST
Specifies the type of access an administrator has to export request administration.
Values: SELECT, NONE (default)

ADMIN_ACCESS_MV_EXP_SERVER
Specifies the type of access an administrator has to export server administration.
Values: ALL, SELECT, NONE (default)

ADMIN_ACCESS_MV_GROUP_PREFERENCE
Specifies the type of access an administrator has to group preference administration.
Values: ALL, SELECT, NONE (default)

ADMIN_ACCESS_MV_LANGUAGE
Specifies the type of access an administrator has to message language administration.
Values: ALL, SELECT, NONE (default)

ADMIN_ACCESS_MV_LOV
Specifies the type of access an administrator has to list of values administration.
Values: ALL, SELECT, NONE (default)

ADMIN_ACCESS_MV_LOV_BIND_CONTROL
Specifies the type of access an administrator has to bind controls to list of values.
Values: ALL, SELECT, NONE (default)

ADMIN_ACCESS_MV_LOV_COLUMN
Specifies the type of access an administrator has to connect a list of values to a database column.
Values: ALL, SELECT, NONE (default)

ADMIN_ACCESS_MV_MESSAGE
Specifies the type of access an administrator has to message administration.
Values: ALL, SELECT, NONE (default)

ADMIN_ACCESS_MV_MESSAGE_ATTRIBUTE
Specifies the type of access an administrator has to individual message attribute administration.
Values: ALL, SELECT, NONE (default)

ADMIN_ACCESS_MV_MESSAGE_TEXT_TL
Specifies the type of access an administrator has to message text translation administration.
Values: ALL, SELECT, NONE (default)

ADMIN_ACCESS_MV_MESSAGE_TYPE

Specifies the type of access an administrator has to message type administration.

Values: ALL, SELECT, NONE (default)

ADMIN_ACCESS_MV_PLATFORM

Specifies the type of access an administrator has to platform administration.

Values: ALL, SELECT, NONE (default)

ADMIN_ACCESS_MV_PREFERENCE

Specifies the type of access an administrator has to preference administration. You cannot insert and delete preferences using MarkView Administration. You can change the default value if the value of this preference is 'ALL' and if changeable is 'Y'.

Values: ALL, SELECT, NONE (default)

ADMIN_ACCESS_MV_PRINT_QUEUE

Specifies the type of access an administrator has to print queue administration.

Values: ALL, SELECT, NONE (default)

ADMIN_ACCESS_MV_PRINT_QUEUE_ASSIGNMENT

Specifies the type of access an administrator has to print queue assignment administration.

Values: ALL, SELECT, NONE (default)

ADMIN_ACCESS_MV_PRINT_REQUEST

Specifies the type of access an administrator has to print request administration.

Values: SELECT, NONE (default)

ADMIN_ACCESS_MV_PRINT_SERVER

Specifies the type of access an administrator has to print server administration.

Values: ALL, SELECT, NONE (default)

ADMIN_ACCESS_MV_PRIVILEGE_GROUP_AUTH

Specifies the type of access an administrator has to privilege group authorization administration.

Values: ALL, SELECT, NONE (default)

ADMIN_ACCESS_MV_SYSTEM_PREFERENCE

Specifies the type of access an administrator has to system preference administration.

Values: ALL, SELECT, NONE (default)

ADMIN_ACCESS_MV_TOOL

Specifies the type of access an administrator has to tool administration.

Values: SELECT, NONE (default)

ADMIN_ACCESS_MV_TOOLSET
Specifies the type of access an administrator has to toolset administration.
Values: ALL, SELECT, NONE (default)

ADMIN_ACCESS_MV_TOOLSET_GROUP_AUTH
Specifies the type of access an administrator has to toolset group authorization administration.
Values: ALL, SELECT, NONE (default)

ADMIN_ACCESS_MV_TOOLSET_TOOL
Specifies the type of access an administrator has to toolset tools administration.
Values: ALL, SELECT, NONE (default)

ADMIN_ACCESS_MV_USER_GROUP
Specifies the type of access an administrator has to user group administration.
Values: ALL, SELECT, NONE (default)

ADMIN_ACCESS_MV_USER_GROUP_MEMBER
Specifies the type of access an administrator has to user group member administration.
Values: ALL, SELECT, NONE (default)

ADMIN_ACCESS_MV_USER_PREFERENCE
Specifies the type of access an administrator has to user preference setting administration.
Values: ALL, SELECT, NONE (default)

ADMIN_ACCESS_MV_USER_PROFILE
Specifies the type of access an administrator has to user profile administration.
Values: ALL, SELECT, NONE (default)

ADMIN_ACCESS_MV_VIEW_TYPE
Specifies the type of access an administrator has to view type administration.
Values: ALL, SELECT, NONE (default)

ADMIN_ACCESS_MV_VIEW_TYPE_GROUP_AUTH
Specifies the type of access an administrator has to view type group authorization administration.
Values: ALL, SELECT, NONE (default)

ADMIN_ACCESS_MV_VOLUME
Specifies the type of access an administrator has to volume administration.
Values: ALL, SELECT, NONE (default)

ADMIN_ACCESS_MV_VOLUME_PATH
Specifies the type of access an administrator has to volume path administration.

Values: ALL, SELECT, NONE (default)

ADMIN_ACCESS_MV_WORKSTATION

Specifies the type of access an administrator has to workstation administration.

Values: ALL, SELECT, NONE (default)

ADMIN_ACCESS_MVS_REPOSITORY

Specifies the type of access an administrator has to SaveSet repositories.

Values: ALL, SELECT, NONE (default)

ADMIN_ACCESS_MVT_QUEUE_MESSAGE

Specifies the type of access an administrator has to administer queues and work item classes associated with messages.

Values: ALL, SELECT, NONE (default)

ADMIN_ACCESS_MVT_TOOL_MESSAGE

Specifies the type of access an administrator has to administer tools and document types associated with messages.

Values: ALL, SELECT, NONE (default)

ADMIN_DOC_BASE_URL

Specifies the URL where the online documentation elements of the MarkView Administration, such as content pages and graphics, is stored. If this value is not set correctly, MarkView Administration can still function, but the context-sensitive help is not available.

Values: A string of up to 400 characters, no default

ADMIN_IMG_BASE_URL

Specifies the URL where the GUI elements of the MarkView Administration, such as style sheets and button graphics, are stored. If this value is not set correctly, the MarkView Administration can still function, but the graphical elements on the page use the broken image symbol of your browser, and text may appear in a different font than usual.

Values: A string of up to 400 characters, no default

ADMIN_LAUNCH_SF_ADMIN_HOME_URL

Specifies the URL for starting the MarkView Process Administration from MarkView Administration.

Values: A string of up to 400 characters, no default

ADMIN_WEB_CUSTOMER_LOGO_ALT_TEXT

Controls optional Alt Text that can be displayed when a MarkView Administration user places the mouse over the customer logo. This preference is ignored when no customer logo URL is set.

Values: A string of up to 400 characters, no default

See Also:

ADMIN_WEB_CUSTOMER_LOGO_URL

ADMIN_WEB_CUSTOMER_LOGO_LINK

ADMIN_WEB_CUSTOMER_LOGO_LINK

Specifies the URL for the page to which the MarkView Administration user is sent when he or she clicks the customer logo. This preference is ignored when no customer logo URL is set.

Values: A string of up to 400 characters, no default

See Also:

ADMIN_WEB_CUSTOMER_LOGO_URL

ADMIN_WEB_CUSTOMER_LOGO_ALT_TEXT

ADMIN_WEB_CUSTOMER_LOGO_URL

Specifies whether a logo is displayed in the upper right corner of the MarkView Administration window.

Verify that the logo used for this purpose is exactly 30 pixels in height. To display the logo, set this preference to the complete URL for the location of the image. For example, a logo URL might look like this example:

http://your.server.com:81/images/logo.gif

Values: A string of up to 400 characters, no default

See Also:

ADMIN_WEB_CUSTOMER_LOGO_LINK

ADMIN_WEB_CUSTOMER_LOGO_ALT_TEXT

HELP_BASE_URL

Specifies the base HTTP URL for access to the MarkView online help. The site URL varies, based on the version. For offline access, reconfigure the preference.

Default value: A URL to the help system on https://docshield.kofax.com that includes the [lang] variable (language code substituted automatically)

HELP_LOGGING_LEVEL

Specifies the level of logging to use for tracking access to the MarkView help system. Specifies what appears in the help.log.

Values: OFF, FATAL, ERROR, WARN (default), INFO, DEBUG, TRACE, ALL

MIGRATION_LOGGING_LEVEL

Specifies the level of logging to use for tracking activity in the Migration utility. Specifies what appears in the migration.log.

Values: OFF, FATAL, ERROR, WARN (default), INFO, DEBUG, TRACE, ALL

MV_COMMENT_NOTIFY_EMAIL_ENABLED

Specifies whether MarkView notifies those who were sent a request for comment if the requester recalls or reroutes the request.

Values: TRUE, FALSE (default)

MVT_ALT_USER_CHECK_PERMISSION

Limits the list of alternate users available to users who have the same permissions as the person for whom they will provide coverage.

Values: TRUE (default), FALSE

MVT_ALT_USER_COLOR

Specifies the color used for the MarkView Alternate User Assignment Web Pages.

Values: 0071B9 (default)

MVT_ALT_USER_SHOW_LOV

Displays the list of available alternate users to assign.

Values: TRUE (default), FALSE

MVT_ALTERNATE_TO_DISABLE_USER_DAYS

The period (number of days) after the user is disabled when this user will be available for selection to assign an alternative user to it.

Values: A number starting from 0, 30 (default).

MVT_FAQ_HTTP_ADDR

Displays a FAQ link in the header (optional). When a user clicks the link, the company FAQ web page is displayed. For example, if you set this preference to http://www.mycompany.com/InvoiceFAQ, this page would be displayed. Specify the HTML content of the FAQ page and place the page on your Web site. If the preference is not set, the FAQ link is not displayed in the header.

Values: A string of up to 200 characters

MVT_HELP_DESK_MAIL_ADDR

Displays an email address for help with an optional subject (optional). A user clicks the Help Desk link in the MarkView header to send an email message to your company's help desk. For example, if you set the preference to administrator@mycompany.com?subject=Help Desk, clicking the link displays an email window with the email address administrator@mycompany.com. The subject is initially set to Help Desk. To omit a default subject, do not specify "?subject=."

The user fills in the email message details. If you do not set the preference, no help desk link appears in the header.

Values:

- Corporate Help Desk email address
- Option: ?subject=

MVT_WEB_STARTUP_URL

Specifies the URL of MarkView home. The default location is in the format:

http://host:port/markview/MVT_MV_Home.Home

Where host and port are the hostname and port number of the Oracle RDBMS.

The value of this preference is set automatically during a new installation of MarkView Application Server. After a migration, you must set the preference manually. You can set this preference at the system, group, and user level.

Values: A URL of up to 2000 characters

SECURITY_PASSWORD_CHECK_METHOD

Specifies password security settings when a new MarkView user is created or the existing MarkView user's password is changed. You can set this preference at the system, group, and user level.

Values:

- STRICT: Specifies that a password must be between 8 and 30 characters and contain at least one Latin letter, one digit, and one special character (~`!@#$%^&*()_-+={}[]\|/?';:,).
- DEFAULT: No restrictions.

When a new user is created, password settings must be consistent with the system level value of the preference. If SECURITY_PASSWORD_CHECK_METHOD system level value is set to STRICT, the AUSS initial password must be consistent with the STRICT rules.

SECURITY_PASSWORD_ENCRYPTION_SCHEME

Specifies whether or not MarkView passwords are stored as hashed data. Kofax recommends that you do not alter this setting after it is configured. Any changes can invalidate existing passwords.

Values:

- PLAINTEXT: Stores passwords as plain text
- SECURE (default): Hashes passwords

This preference affects only passwords that are created subsequent to system setup. So, for example, if you port existing users to a new system where the default SECURE is in effect, the existing passwords are not hashed. To hash existing passwords, use the Change Password subtab of the User Profile tab in MarkView Administration. You cannot use the same password.

USERMGMT_LOGGING_LEVEL

Specifies the level of logging to use for tracking user activity, for example, authentication or authorization. Specifies what appears in the following log files:

- `usermgmt.log`: Contains all user management related log messages, including authentication failures and successful logins, as well as all other messages from authentication services, such as LDAP or MSAD.
- `usermgmt-auth.log`: Contains error messages related to login process only, including authentication failures, successful logins, and messages about temporary locked users.
- `usermgmt-cas.log`: Contains error messages related to a login portal application (cas.war), including errors occurred during the login process.
- `usermgmt-auss.log`: Contains error messages related to AUSS.

Values: OFF, FATAL, ERROR, WARN (default), INFO, DEBUG, TRACE, ALL

USER_SESSION_LOG_REC_LIFETIME

Specifies for how many months to keep the historical records in the mv_session_log and mv_object_access_log tables.

Values: An integer >0, 36 (default)

XSS_FILTER_ENABLED_FOR_EXCEPTION_URL

When TRUE, enables the Cross-Site Scripting filter (XSS) for URL addresses.

If you reset this value, you must restart the MarkView application for the value to take effect.

You can set this preference at the system level.

Values: TRUE (default), FALSE.

MarkView Applications preferences

GRAPHICS_IMG_BASE_URL

Specifies the directory from which MarkView accesses icons and images used by MarkView components.

Default: http://${hostname}:${port}/graphics

PLSQLSERVLET_LOGGING_LEVEL

Specifies the level of logging to use for tracking MarkView messages in the PLSQL Servlet.

Values: OFF, FATAL, ERROR, WARN (default), INFO, DEBUG, TRACE, ALL

MarkView Approval/Rejection by Email preferences

MVAP_APPROVAL_REJECTION_EXPIRATION_DATE

Specifies the number of days until the option to approve or reject an invoice expires. Setting this value to zero (0) keeps the option from expiring.

You can set this preference at the system, group, or user level.

Values: Number of days, 14 (default)

MVAP_CONTROL_EMAIL_ADDRESS

Specifies the email address from which the Mail Gateway sends approval and rejection emails.

You can set this preference at the system, group, or user level.

Values: An SMTP email address (no default)

MVAP_EMAIL_ATTACHMENT_SIZE

Specifies the size limit, in KB, for attachments. A value of 0 prevents email attachments.

You can set this preference at the system, group, or user level.

Values: Number in kilobytes, 10000 (default)

MVAP_ENABLE_APPROVAL_REJECTION_EMAIL

Enables the feature to approve and reject work items by email. TRUE enables the feature.

You can set this preference at the system, group, or user level.

Values: TRUE, FALSE (default)

MVAP_ENABLE_NOTIFICATION_EMAIL_CUSTOM

Allows a MarkView administrator to customize the email text.

You can set this preference at the system, group, or user level.

Values: TRUE, FALSE (default)

MVAP_ENABLE_SUCCESS_MESSAGE

Allows the system to send success messages. TRUE enables this feature.

You can set this preference at the system, group, or user level.

Values: TRUE, FALSE (default)

MVAP_SERVLET_USERNAME

Specifies the user name used by the Mail Gateway to render PDF invoice images for Approval/Rejection emails if the email approval process is used.

Accepted values include built-in MarkView accounts, such as Admin, SQLFlow, SQLFlow_Mail. If you use an ID for an account that is set up in the ERP, the user ID must also exist in MarkView. The password must be identical in the ERP and MarkView.

The user must have the correct privileges and right to render PDFs. (Admin has these rights by default.)

You can set this preference at the system, group, or user level.

Values: Admin (default), user ID

MarkView Audit preferences

MVT_RETAIN_MARKUP_HISTORY_MESSAGES

Specifies whether to save a history of the events associated with an action.

Values:

- ALL: Default for new installations
- NONE: Default for upgrades

MVT_RETAIN_WORKFLOW_HISTORY_MESSAGES

Specifies whether to save a history of the events associated with business rule processing.

Values:

- ALL: Default for new installations
- NONE: Default for upgrades

MarkView AUSS preferences

MVERP_AUSS_MAPPING_LANGUAGE

Specifies the language used to map data management for user and responsibility synchronization.

Values:

- String of up to 2000 characters
- US (American English) (default)

MVFC_OUTBOUND_SMTP_CONNECTION_SECURITY

Specifies if security authorization is required.

Values: None (default), SSL

MVFC_OUTBOUND_SMTP_PASSWORD

Specifies the password used to authenticate with the SMTP server when sending outbound email messages. If the SMTP server does not require authentication, leave this preference blank. During installation, the installer sets this password.

MVFC_OUTBOUND_SMTP_PORT

Identifies the TCP/IP port used to communicate with the SMTP server when sending outbound email messages. Most SMTP servers use port 25.

Values: 25 (default), a valid port number

MVFC_OUTBOUND_SMTP_SERVER

Identifies the name of the SMTP server used when sending outbound email messages. If blank, no outbound emails are sent.

MVFC_OUTBOUND_SMTP_USER

Specifies the user name used to authenticate with the SMTP server when sending outbound email messages. If the SMTP server does not require authentication, leave this preference blank. If you entered the SMTP server address during the MarkView installation, the preference value is set to this SMTP server address.

A user can enable notifications in AUSS only if MVFC_OUTBOUND_SMTP_USER has a valid SMTP server address.

MarkView Authentication preferences

AUTH_ACCOUNT_TEMP_LOCK_TIME

Specifies how many minutes to lock the user if the maximum number of login attempts has been reached.

If you reset this value, you must restart the MarkView application for the value to take effect.

You can set this preference at the system level.

Values: An integer greater than or equal to zero, 5 (default)

AUTH_HIDE_LOGOUT_LINK

When TRUE, removes the Logout link from the MarkView toolbar menu.

You can set this preference at the system level.

Values: TRUE, FALSE (default)

AUTH_LOGIN_HTTP_URL

Specifies the HTTP URL of the authentication point for the MarkView applications or the SSO entry point URL.

If you reset this value, you must restart the MarkView application for the value to take effect.

You can set this preference at the system level.

Values: /../cas/login.do

AUTH_LOGOUT_HTTP_URL

Specifies the HTTP URL to log out the MarkView applications.

If you change the default value, the MarkView application does not perform a user logout before redirecting to the configured logout URL.

You can set this preference at the system level.

Values: logout.do (default)

AUTH_LOGOUT_LANDING_URL

The preference specifies the URL to a corporate logout landing page, such as:

```
http://corporate.example.com/main.jsp
```

If the AUTH_LOGOUT_HTTP_URL preference is set to the default value logout.do, MarkView performs a user logout and redirect to the specified logout landing page.

The value must be an absolute URL address or a relative URL address starting from the slash symbol (/), such as:

```
/../cas/logouted.do
```

If you reset this value, you must restart the MarkView application for the value to take effect.

You can set this preference at the system level.

AUTH_MAX_FAILED_LOGINS_ALLOWED

Specifies the maximum number of failed login attempts allowed before authentication service temporarily locks the user.

You can set this preference at the system level.

Values: An integer greater than or equal to zero, 5 (default)

AUTH_SSO_SAML_CERT_NAME

Specifies the name of the key pair entry in the Java keystore.

If you reset this value, you must restart the MarkView application for the value to take effect.

You can set this preference at the system level.

Values: saml (default)

AUTH_SSO_SAML_CERT_PASSWD

Specifies the password of the key pair entry in the Java keystore.

If you reset this value, you must restart the MarkView application for the value to take effect.

You can set this preference at the system level.

AUTH_SSO_SAML_ENABLE_LOGOUT_SUPPORT

When TRUE, enables Single Logout for all running SSO sessions.

When FALSE, you must also configure either AUTH_HIDE_LOGOUT_LINK to hide the logout link for all MarkView pages or AUTH_LOGOUT_LANDING_URL to specify the URL to redirect to after the logout.

If you reset this value, you must restart the MarkView application for the value to take effect.

You can set this preference at the system level.

Values: TRUE, FALSE (default)

AUTH_SSO_SAML_ENABLE_SUPPORT
When TRUE, enables SAML SSO integration.
To enable SAML SSO, you must also set the MV_ENABLE_SINGLE_SIGN_ON preference to TRUE.
If you reset this value, you must restart the MarkView application for the value to take effect.
You can set this preference at the system level.
Values: TRUE, FALSE (default)

AUTH_SSO_SAML_IDP_METADATA_PATH
Specifies the path to the IDP metadata file.
If you reset this value, you must restart the MarkView application for the value to take effect.
You can set this preference at the system level.
Set the value in the following format:
`file:/projects/mvhome/markview/saml/idp-metadata.xml`

AUTH_SSO_SAML_KEYSTORE_PASSWD
Specifies the password associated with the Java keystore.
If you reset this value, you must restart the MarkView application for the value to take effect.
You can set this preference at the system level.

AUTH_SSO_SAML_KEYSTORE_PATH
Specifies the path to the Java keystore.
If you reset this value, you must restart the MarkView application for the value to take effect.
You can set this preference at the system level.
Set the value in the following format:
`file:/projects/mvhome/markview/saml/saml.jks`

AUTH_SSO_SAML_LOGIN_ERROR_URL
Specifies the HTTP URL address to redirect to if a user SSO SAML authentication fails.
If you reset this value, you must restart the MarkView application for the value to take effect.
You can set this preference at the system level.
Values: /../cas/error.do (default)

AUTH_SSO_SAML_USER_ATTRIBUTE_NAME
Specifies the SAML principal attribute name that contains a user ID. Identifies a user in the internal database.
If you reset this value, you must restart the MarkView application for the value to take effect.
You can set this preference at the system level.
Values: urn:oid:0.9.2342.19200300.100.1.1 (default)

AUTH_SSO_USER_CREDENTIALS_COOKIE_NAME

Specifies the name of the cookie that contains the user password.

If you reset this value, you must restart the MarkView application for the value to take effect.

You can set this preference at the system level.

Values: SM_USER (default)

If the specified cookie does not exist in the request, the MarkView server ignores this cookie. If the specified cookie exists in the request, the cookie value is used as a user password to log in.

AUTH_SSO_USER_CREDENTIALS_HEADER_FIELD

Specifies the name of the request header that contains the user password.

If you reset this value, you must restart the MarkView application for the value to take effect.

You can set this preference at the system level.

Values: SM_USER (default)

If the specified header does not exist in the request , the MarkView server ignores this header field. If the specified header exists in the request, the MarkView server uses the header value as a user password to log in.

AUTH_SSO_USERNAME_COOKIE_NAME

Specifies the name of the cookie that contains the user name.

If you reset this value, you must restart the MarkView application for the value to take effect.

You can set this preference at the system level.

Values: SM_USER (default)

AUTH_SSO_USERNAME_HEADER_FIELD

Specifies the name of the request header that contains the user name.

If you reset this value, you must restart the MarkView application for the value to take effect.

You can set this preference at the system level.

Values: SM_USER (default)

AUTH_USER_SESSION_TIMEOUT

Specifies (in minutes) how much time must elapse between user requests and actions before MarkView invalidates the inactive session.

> If users are inactive for the specified period of time, they are automatically logged out. If users do not click **Logout** before closing the browser window, they remain logged on to MarkView. If users have multiple MarkView windows open and click **Logout** once, the current session is ended in every window.

We recommend that you set this value to no more than 720 minutes (or 12 hours).

If you set the value to 0 (zero), the default value is used.

If you change this preference value, the new value does not apply to all current sessions. Start a new session to activate the change.

You can set this preference at the system level.

Values: An integer greater than or equal to zero, 30 (default)

MV_ENABLE_SINGLE_SIGN_ON

When TRUE, enables Single-Sign-On integration. For example, SiteMinder or another single sign-on application passes a user name over the http header or cookie.

If you reset this value, you must restart the MarkView application for the value to take effect.

You can set this preference at the system level.

Values: TRUE, FALSE (default)

WEBCLNT_SEC_AUTH_TYPE

Specifies the authentication method for all MarkView servlet applications.

For a Cookie/Header SSO configuration, if you switch between Standard and Custom configurations, you must restart the MarkView application for the value to take effect.

You can set this preference at the system, group, and user levels.

Values:

- CUSTOM: Allows for custom validation. Requires code in MVW_Authenticate_Custom package.
- ERP: Authenticates against the Oracle E-Business Suite user name and password.
- MV: (default) Authenticates against the MarkView user name and password.
- MSAD: Authenticates against the Microsoft Active Directory user name and password.
- OID: Authenticates against the Oracle Internet Directory user name and password.
- LDAP: Authenticates against the General LDAP Server user name and password.
- PSE: (obsolete)Authenticates against the PeopleSoft Enterprise user name and password.

MarkView Bar Code Generator preferences

MVAS_BCG_BASE_URL

Specifies the base URL for the MarkView Application Server bar code Generator. MarkView Expense Management requires this URL to generate bar codes for its cover sheets.

The URL takes the following form:

http://server:port/servlet/MarkView.bar code.

Values: A string of up to 200 characters, no default

MVAS_BCG_BUFFER_SIZE

Sets the size of the memory buffer for the MarkView Bar Code Generator.

Values: An integer that is greater than zero (0), no default

MVAS_BCG_LOGGING_LEVEL

Specifies the level of logging to use for tracking activity in the Bar Code Generator. Specifies what appears in the mvbcg.log.

Values: OFF, FATAL, ERROR, WARN (default), INFO, DEBUG, TRACE, ALL

MarkView Bar Code Server preferences

BAR_CODE_MAINTAIN_HISTORY

If set to Yes (Y), maintains a history and status of bar code requests in the database. This record is useful if you are trying to configure or debug the bar code server.

If you change the value of this preference, you must restart the bar code Server Windows service to begin or terminate the logging of bar code requests. The bar code Server and the bar code Generator are different applications. Restarting the bar code Generator application server process on the application server has no effect on the logging of bar code requests.

Values: Y, N (default)

MarkView Components preferences

ABOUT_SERVICE_LOGGING_LEVEL

Specifies the level of logging to track for information concerning activity in the About menu in MarkView. Specifies what appears in the about-service.log.

Values: OFF, FATAL, ERROR, WARN (default), INFO, DEBUG, TRACE, ALL

WEBCLNT_WKSTN_SERIAL_NO

Specifies the workstation serial number ID associated with a MarkView component. To see a list of valid workstation serial number values, select the Workstations tab in MarkView Administration. The Serial Number column in the Workstations > List page identifies the serial number IDs currently defined in your system.

The workstation serial number works with the associated platform, volume, and volume path values to locate and access MarkView documents.

For the best results, do not set WEBCLNT_LOGON_STYLE to VERBOSE.

Values: The following table lists workstation serial number conventions for MarkView components.

Conventional Workstation Serial Numbers

Component	Conventional Serial Number
Capture and Output Applications	SN1234
Document Transport Module (DTM)	MVAS_DTM

MarkView Connector preferences

CONNECTOR_ADMIN_EMAIL

Specifies the email address that receives Administrative Notifications if a work item moves to the Workflow Administration queue in any of three Connector workflows.

Values: An email address for the site

CONNECTOR_DEBUG_MODE

Specifies whether method debugging messages are captured in the mvcn_operation_debug table. Also, this preference controls whether the interface function invocation is captured in the mvcn_interface_debug table.

Values: TRUE (default), FALSE

CONNECTOR_REVIEW_IMG_BASE_URL

Specifies the path to the graphics used on the Connector Review windows.

Values: The full URL of the Connector/Graphics directory, with a trailing slash at the end:

For example: http://GraphicsServerHost:GraphicsServerPort/graphics/connector/

MVCN_AP_TERMS

Defines the terms to use when paying the invoice.

Values:

- BEST: Use the best available terms to pay this invoice.
- INVOICE: Use the terms specified on this invoice.
- SUPPLIER: Use the terms associated with the supplier.
- SUPPLIER_SITE: Use the terms associated with the supplier site.
- PO: Use the terms associated with the purchase order.

MVCN_AP_TERMS_RANK_DFF_COLUMN

Defines the name of the column in the ap_terms table that determines the relative rank of a term.

The system only uses this preference when MVCN_AP_TERMS is set to BEST.

Values: The column name from the ap_terms table

MVCN_AUTOCREATE_NONPO_LINE

Specifies whether MarkView Connector creates a dummy line for Non-PO invoices.

Values:

- TRUE: MarkView Connector creates a dummy line for Non-PO invoices if either of the following conditions exist:
  - The line items in the invoice do not add up to the invoice total. In this case, MarkView Connector adds a line item with an amount that equals the difference between existing line items and the grand total. The dummy line cannot contain a negative amount.
  - There are no line items in the invoice; there is only a grand total. MarkView Connector adds a line item with an amount equal to the grand total.
  - The created dummy line has the account ID defined for the Organization in Module Administration.
- FALSE (default): MarkView Connector does not create a dummy line for Non-PO invoices.

MVCN_AUTOCREATE_PO_LINE

Specifies whether MarkView Connector creates a dummy line for PO invoices.

Values:

- TRUE: Creates a dummy line if:
  - The invoice line items do not add up to the invoice total. MarkView Connector adds a line item with an amount that equals the difference between the existing line items and the grand total. The dummy line cannot contain a negative amount.
  - The invoice has no line items but has a grand total. MarkView Connector adds a line item with an amount that equals the grand total.
  - The created dummy line has the account ID defined for the Organization in Module Administration.
- FALSE (default): Does not create a dummy line.

MVCN_AUTOMATCH_RECEIPTS_STATUSES

Generates a comma-separated list of invoicing statuses that are used during automatic matching to receipts in MarkView Connector. Only receipts with defined statuses are taken into account.

Values: OPEN (default), FULLY INVOICED, OVER INVOICED, PARTIALLY INVOICED

MVCN_AUTOCREATE_PREAPPROVED_LINE

Specifies whether MarkView Connector creates a dummy line for Non-PO, and PO, and Pre-Approved invoices.

Values:

- TRUE: Creates a dummy line for pre-approved invoices if:
  - The line items in the invoice do not add up to the invoice total. In this case, MarkView Connector add a line item whose amount equals the difference between the existing line items and the grand total. The dummy line cannot contain a negative amount.
  - There are no line items in the invoice; there is only a grand total. MarkView Connector adds a line item with an amount equal to the grand total.
  - The created dummy line has the account ID defined for the Organization in Module Administration.
- FALSE (default): Does not create a dummy line for PO invoices.

MarkView Database Objects preferences

MV_DATE_FORMAT

Sets the default format of the date that appears in Web Inbox, Web Inquiry, and in MarkView Viewer detail sections except Document History, Action History, and Event Log.

Values:

- DD-MON-YYYY (default)
- MM/DD/YYYY
- YYYY-MM-DD
- DD-MON-YYYY (capitalize all letters in the month abbreviation)
- MONTH DD YYYY (capitalize all letters in the month name)

MV_DATE_TIME_FORMAT

Sets the default format of the date and time that appears in MarkView Viewer Document History, Action History, and Event Log.

Values:

- DD-MON-YYYY HH24:MI:SS (default)
- MM/DD/YYYY HH12:MI:SS
- YYYY-MM-DD HH24:MI:SS
- DD-MON-YYYY H:MI:SS (capitalize all letters in the month abbreviation)
- MONTH DD YYYY HH24:MI:SS (capitalize all letters in the month name)

MV_LANGUAGE_ABBREV

Sets the default language for MarkView applications that can be localized, provided a translated version is available for that language. Kofax strongly recommends that you assign users to a language user group (LOCALE_xx) in MarkView Administration instead of changing this preference value.

Values:

- de: German
- en (default): American English
- es_ES: Castilian Spanish
- fr: French
- it: Italian
- ja: Japanese
- pl: Polish
- pt_BR: Brazilian Portuguese
- zh_CHS: Simplified Chinese

MV_LOG_DATE_TIME_FORMAT

Sets the default format of the date-time stamp that appears in log messages, if included in the log message format.

For example, 2008/01/01 12:00:59 AM, or the first of January 2008, at 59 seconds past midnight.

Values:

- MM/DD/YYYY HH:MI AM
- DD/MM/YYYY HH:MI AM
- DD-MON-YYYY HH:MI AM
- MM/DD/YYYY HH24:MI
- DD/MM/YYYY HH24:MI
- DD-MON-YYYY HH24:MI
- MM/DD/YYYY
- DD/MM/YYYY
- DD-MON-YYYY
- HH24:MI:SS
- HH24:MI
- MM/DD/YYYY HH:MI:SS AM

- DD/MM/YYYY HH:MI:SS AM
- DD-MON-YYYY HH:MI:SS AM
- HH:MI:SS AM
- YYYY/MM/DD HH:MI:SS AM (default)

MV_LOG_DESTINATION

Defines the mechanism to use to write log messages. When you finish testing and debugging, set the MV_LOG_LEVEL preference to OFF to stop writing log messages. This is especially important in a production environment.

Values: A string of up to 30 characters:

- TABLE: Directs MV_LOG to write messages to the mv_log_output database table. After testing and debugging, purge the table contents and set MV_LOG_LEVEL to OFF to keep the table from growing unnecessarily large.
- FILE: Directs MV_LOG to use the UTL_FILE package to write messages to a file in a directory that is accessible to the database server. Set the database parameter UTL_FILE_DIR to one or more directories to enable writing to files. The MV_LOG_FILE_PATH preference is typically set to one of these directories. After testing and debugging, delete the message file and set MV_LOG_LEVEL to OFF to prevent the file from growing unnecessarily large.
- PIPE: Directs MV_LOG to use the DBMS_PIPE package to write messages to a pipe. Set MV_LOG_LEVEL to OFF to stop writing to the pipe; close the pipe after testing and debugging by calling MV_LOG.Close(Destination).
- DBMS_OUTPUT (default): Directs MV_LOG to use the DBMS_OUTPUT package to write messages. If you use SQL*plus to monitor messages, increase server output as follows: SQL> set serveroutput on size 1000000. The default of 2000 characters is typically inadequate to accommodate the output that being generated.
- HTML: Directs MV_LOG to use HTP.P to write messages. The procedure must be called from an appropriate context—for example, from a web page generated using the PL/SQL Toolkit—for messages to be seen in the web browser as they occur.

MV_LOG_FILE_NAME

Sets the default filename when logging to a file.

Values: A string of up to 80 characters, mv_message.txt (default)

MV_LOG_FILE_PATH

Sets the default path location of the log file when logging to a file.

Values: A string of up to 200 characters, /temp/MarkView/logs (default)

MV_LOG_IGNORE_ERROR

If TRUE (the preferred setting in a production environment), this preference instructs the logging mechanism to ignore errors that occur in the MV_LOG procedure (for example, failures in attempting to write log messages to a file or pipe due to lack of space). A value of FALSE causes the mechanism to try to report the problem by flagging the condition.

Values: TRUE (default), FALSE

MV_LOG_LEVEL

Specifies the level of logging to use for tracking debug data from PL/SQL packages in the database. See MV_LOG_DESTINATION for more information.

Values: OFF (default), FATAL, ERROR, WARN, INFO, DEBUG, TRACE, ALL

MV_LOG_MESSAGE_FORMAT

Defines the default format of messages written to the log. A message can consist of the values shown in the following table:

Message Log Values

Value	Description
#D	Include a date-time stamp of the format indicated in the MV_LOG_DATE_FORMAT preference.
#U	Include the user ID.
#L	Include the importance level of the message.
#S	Include the source or origin of the message; typically, package.procedure_name.
#C	Include the message category.
#M	Include the message itself.

If the preference does not account for an element, the element does not appear in a logged message. Text not replaced by a # value substitution is output exactly as it appears in the preference value.

Values: A string of no more than 80 characters, #D - #M (default, which sets the date, followed by a space, a dash, a space, and the message content)

MV_LOG_PIPE_NAME

Sets the default pipe name when logging to a pipe.

Values: A string of up to 80 characters, MV_MESSAGE (default)

MVW_SECURITY_REALM

Identifies the realm that web-authenticated users validate against.

Values: A string of up to 2000 characters, MarkView Users (default)

SYSTEM_LOCK_TIMEOUT_PERIOD

Specifies for how many minutes to retain expired locks before purging them from the MV_OBJECT_LOCK table. Use this preference to preserve a record of locks without allowing the table to grow too large.

Values: An integer ≥0 (greater than or equal to zero), 5 (default)

SYSTEM_OBJ_AUTH_RETENTION_PERIOD

Specifies for how many minutes to retain expired keys before purging them from the MV_OBJECT_AUTHORIZATION table. Use this preference to preserve a record of authorization key requests without allowing the table to grow too large. The system deletes no more than 100 rows at a time to help keep the rollback segment from becoming too large.

Values: An integer ≥0 (greater than or equal to zero), 1440 (default)

MarkView Document Library preferences

ADMIN_ACCESS_MVRM_OBJECT_CLASS

Displays the Document Types main tab in MarkView Administration for Document Library.

Values: ALL, SELECT, NONE (default)

ADMIN_ACCESS_MVRM_OBJECT_PRIV

Specifies the type of access an administrator has to document privilege administration.

Values: ALL, SELECT, NONE (default)

ADMIN_ACCESS_MVRM_OBJ_CLASS_PROPERTY

Displays the Document Type Properties main tab and the Document Types—Document Type Properties subtab in MarkView Administration for Document Library.

Values: ALL, SELECT, NONE (default)

ADMIN_ACCESS_MVRM_OBJ_PROPERTY_VALUE

Specifies the type of access an administrator has to document property value administration.

Values: ALL, SELECT, NONE (default)

ADMIN_ACCESS_MVRM_OBJ_PROP_VALUE_AUTH

Displays the Document Type Properties—Document Type Property Value Privilege Authorizations subtab in MarkView Administration for Document Library.

Values: ALL, SELECT, NONE (default)

ADMIN_ACCESS_MVRM_SEARCH

Enables MarkView Administration for Document Library to define custom search fields.

Values: ALL, SELECT, NONE (default)

MVRM_CREATE_OBJECT_WO_ATTACHMENT_FORM

When TRUE, gives the user permission to create a document without a document image attachment on the File Record page.

Values: TRUE, FALSE (default)

MVRM_ENABLE_EMAIL

When TRUE, displays the email button on the Search Results page of the MarkView Document Library interface. Users can click the email button to email the selected document using the default email application. This functionality requires that you modify the custom callout.

Values: TRUE, FALSE (default)

MVRM_ENABLE_FULL_TEXT_SEARCH

When TRUE, displays the Full Text Search field on the Search page of the MarkView Document Library interface.

Values: TRUE (default), FALSE

MVRM_FILERECORD_JUMP_TO_OBJECT

Specifies the location where the user can file a new document after a single new document upload.

Values:

- TRUE: Takes the user to the unfiled documents queue.

- FALSE (default): Keeps the user at the File Record page.

MVRM_FILING

Displays the File Record tab on the MarkView Document Library interface.

Values: TRUE (default), FALSE

MVRM_HTTP_BASE_URL

Specifies the URL from which users start a session with MarkView Document Library. If this value is incorrect, users cannot work with MarkView Document Library.

Values: A string of up to 400 characters, no default

MVRM_IMG_BASE_URL

Specifies the URL of the GUI elements of MarkView Document Library, such as style sheets and tab and button graphics. If this value is incorrect, MarkView Document Library can still function correctly, but graphic elements are displayed using the broken image symbol of your browser, and text may appear in a different font.

Value: A string of up 400 characters

MVRM_NON_MV_DOCS_ARE_ATTACHMENTS

When TRUE, MarkView Document Library auto-saves non-MarkView documents to the user's computer.

Values: TRUE, FALSE (default)

MVRM_NUM_DOCUMENTS_TO_UPLOAD_AT_ONCE

Specifies the number of file uploaded lines to display on the File Record tab of the MarkView Document Library interface. If the value is less than 1, no lines are displayed, and the employee cannot upload files. This preference can only be specified at the User and System levels.

Values: An integer >0 (greater than or equal to zero), 1 (default)

MVRM_VIEW_BAR_CODE

When TRUE, displays the bar code button on the View Document page of the MarkView Document Library interface. When available, clicking the bar code button lets the employee view the bar code cover page for the document. This preference can only be specified at the System level.

Values: TRUE, FALSE (default)

MVRM_WKSTN_SERIAL_NO

Specifies the workstation serial number ID used by Document Library.

Values: Workstation ID

MarkView DTM preferences

CMSYNC_LOGGING_LEVEL

Sets the logging level for messages in MarkView Content Management Systems Synchronization. Specifies what appears in `cmsync.log`.

Values: OFF, FATAL, ERROR, WARN (default), INFO, DEBUG, TRACE, ALL

MVAS_DTM_ARCHIVELINK_BASE_URL

Specifies the base URL of the ArchiveLink interfaced Content Server that stores the documents.

Values: A string of up to 2000 characters, no default

MVAS_DTM_ARCHIVELINK_REPO_NAME

Specifies the repository name of the ArchiveLink in which to store the documents.

Values: Name of the repository

MVAS_DTM_BASE_URL

Specifies the URL location of the DTM.

Values: A string of up to 2000 characters, no default

MVAS_DTM_COMPATIBILITY_MODE

Specifies the security setting for the Document Transport Module.

Values:

- 4.1: Basic Compatibility supports the session key based DownloadDocument DTM action used by MarkView Viewer.
- 4.2 (default): Extended Compatibility supports full the MarkView suite security for DownloadDocument, as well as the Image actions (DownloadImage, ExistsImage, UploadImage, DeleteImage). Kofax recommends Extended compatibility mode.

MVAS_DTM_COPY_SUCCESS_PAGE

Specifies the default success page that displays if an image file copy is successful.

Values: A string of up to 2000 characters

MVAS_DTM_DELETE_MODE

Controls how a deletion occurs if the Document Transport Module platform uses UNC.

Values:

- SIMPLE (default): Deletes the file.
- OVERWRITE: Replaces each byte of the file with 'x', prior to deleting the file.
- ZEROSIZE: Overwrites the file, then deletes it and creates a zero size file with the same name. This setting is the most secure, but also the most resource intensive.

MVAS_DTM_DELETE_PRIV_CODE

Specifies the default privilege code that the Document Transport Module uses if none is specified for deleting an image file. The Document Transport Module verifies that the workstation serial number, document type, and user all have the proper privileges according to this preference.

Values:

- A string of up to 2000 characters
- FLDDEL (default)

MVAS_DTM_DOWNLOAD_BLOCK_SIZE

Specifies the size in bytes of the units of data being retrieved from the document server, and then passed to the end user. The Document Transport Module requests this data size, then passes as much information to the user as it can. A good rule of thumb is to set this number to the block size of your document server. This approach allows for hard drive optimization when reading the smallest block possible.

Values:

- An integer ≥0
- 0 (default)

MVAS_DTM_DOWNLOAD_PRIV_CODE

Sets the default privilege code that the Document Transport Module uses if none is specified for downloading. The Document Transport Module verifies that the workstation serial number, document type, and user all have the proper privileges according to this preference. For optimization purposes, you should always return this value from the custom packages. If you use an implementation specific application, you may want to create your own privilege code.

Values:

- A string of up to 200 characters
- FLDDNLD (default)

MVAS_DTM_ERROR_PAGE

Specifies the URL to display if an error occurs.

Values: A URL of up to 200 characters

MVAS_DTM_FILENET_DOMAIN_NAME

Specifies the FileNet Content Manager domain in which the object store is contained.

Values: FNP8V45 (default), domain name

MVAS_DTM_FILENET_FOLDERS

Specifies a single folder name or a list of folders separated by a comma. The folders are potential locations of documents within the Object Store. Use a forward slash (/) as a subfolder delimiter. The first mentioned folder name indicates the location to upload new documents.

Values: docserver (default), a character string.

If the docserver folder does not exist on the server, this folder will be created when a user uploads a document to FileNet for the first time.

MVAS_DTM_FILENET_HOSTNAME

Specifies the name of the host server on which the FileNet Content Manager integration engine specified in the MVAS_DTM_INTEGRATE_MODE preference and the MarkView DTM reside.

Values: hostname

MVAS_DTM_FILENET_JAAS_STANZA_NAME

Specifies the JAAS against which to authenticate the FileNet user name and password when connecting to the FileNet Content Engine when storing and retrieving documents.

Values: FileNetP8WSI (default for FileNet web services), web service name

MVAS_DTM_FILENET_OBJECT_STORE

Specifies the FileNet Content Manager object store database in which to store MarkView documents.

Values: alphanumeric character string

MVAS_DTM_FILENET_PASSWORD

Specifies the password associated with the user name specified in the preference MVAS_DTM_FILENET_USERNAME.

Values: A character string

MVAS_DTM_FILENET_PORT

Specifies the http or https port that MarkView DTM uses to connect to the FileNet Content Manager integration engine specified in the MVAS_DTM_INTEGRATE_MODE preference.

Values: A valid port number

MVAS_DTM_FILENET_PROTOCOL

Specifies the protocol for MarkView to use when connecting to the FileNet Content Manager integration engine specified in the MVAS_DTM_INTEGRATE_MODE preference.

Values: http (default), https

MVAS_DTM_FILENET_URL_TRANSPORT

Specifies the transport protocol name in the connection URL to FileNet Content Engine Web Services.

Values:

- For IBM FileNet CM 5.0 or earlier: Set the preference to **FNCEWS40DIME**.
- For IBM FileNet CM 5.1 or higher: Set the preference to **FNCEWS40MTOM**.

The default system value is **FNCEWS40DIME**.

MVAS_DTM_FILENET_USERNAME

Specifies the user name to use when storing documents in and retrieving them from FileNet Content Manager.

Values: A string of up to 30 alphanumeric characters (without spaces or special characters)

MVAS_DTM_FILENET_WASP_LOCATION

Specifies the location where the FileNet Content Engine Client web service is defined. The directory specified must contain the clientconf.xml file. (The default value is the default FileNet installation location.)

Values: ${FILENET_HOME}\CEClient\wsi (default), web services location

For integrations with IBM FileNet 4.5.1 or higher, leave the field empty as the preference value.

MVAS_DTM_ICM_CONNECTION_TIMEOUT

Specifies the number of milliseconds before the IBM Content Manager connections timeout during connection initialization.

Values: 0 (default), an integer $\geq$0

MVAS_DTM_ICM_INIT_CONNECTIONS

Specifies the initial number of IBM Content Manager connections.

Values: 10 (default), an integer $\geq$0

MVAS_DTM_ICM_MAX_CONNECTIONS

Specifies the maximum number of IBM Content Manager connections at a time.

Values: 20 (default), an integer $\geq$0

MVAS_DTM_ICM_MIN_CONNECTIONS

Specifies the minimum number of IBM Content Manager connections at a time.

Values: 7 (default), an integer $\geq$0

MVAS_DTM_ICM_HOSTNAME

Specifies the name of the host server on which the IBM Content Manager integration engine specified in the MVAS_DTM_INTEGRATE_MODE preference and the MarkView DTM reside.

Values: hostname

MVAS_DTM_ICM_PASSWORD

Specifies the password associated with user name specified in the preference MVAS_DTM_ICM_USERNAME.

Values: A character string

MVAS_DTM_ICM_PROTOCOL

Specifies the protocol for MarkView to use when connecting to the IBM Content Manager integration engine specified in the MVAS_DTM_INTEGRATE_MODE preference.

Values: http (default), https

MVAS_DTM_ICM_USERNAME

Specifies the user name to use when storing documents in and retrieving them from IBM Content Manager.

Values: A string of up to 30 alphanumeric characters (without spaces or special characters)

MVAS_DTM_INTEGRATE_MODE

Specifies the third-party (if any) integration that MarkView DTM uses.

Values: OFF (default), ArchiveLink, IBM Content Manager, Documentum Content Server, FileNet Content Manager, Oracle WebCenter Content

MVAS_DTM_LOGGING_LEVEL

Sets the logging level for messages in the MarkView Document Transport Module. Specifies what appears in the mvdtm.log.

Values: OFF, FATAL, ERROR, WARN (default), INFO, DEBUG, TRACE, ALL

MVAS_DTM_WCC_DOCUMENT_TYPE

Specifies the Oracle WebCenter Content (OWCC) document type to assign to new MarkView documents. Configure other valid values in OWCC. See the Oracle documentation for more information.

Values: DOCUMENT (default)

MVAS_DTM_WCC_HOSTNAME

Specifies the name of the host server on which the Oracle WebCenter Content integration engine specified in the MVAS_DTM_INTEGRATE_MODE preference and the MarkView DTM reside.

Values: hostname

MVAS_DTM_WCC_OBJECT_STORE

Specifies the Oracle WebCenter Content object store database in which to store MarkView documents.

Values: alphanumeric character string

MVAS_DTM_WCC_PASSWORD

Specifies the password associated with user name specified in the preference MVAS_DTM_WCC_USERNAME.

Values: A character string

MVAS_DTM_WCC_PORT

Specifies the http or https port that MarkView DTM uses to connect to the Oracle WebCenter Content integration engine specified in the MVAS_DTM_INTEGRATE_MODE preference.

Values: A valid port number

MVAS_DTM_WCC_PROTOCOL

Specifies the protocol for MarkView to use when connecting to the Oracle WebCenter Content integration engine specified in the MVAS_DTM_INTEGRATE_MODE preference.

Values: http (default), https

MVAS_DTM_WCC_SECURITY_GROUP

Specifies the Oracle WebCenter Content security group for new MarkView documents. Configure values in OWCC. See the Oracle documentation for more information.

Values: SECURE (default)

MVAS_DTM_WCC_USERNAME

Specifies the user name to use when storing documents in and retrieving them from Oracle WebCenter Content.

Values: A string of up to 30 alphanumeric characters (without spaces or special characters)

MVAS_DTM_UPLOAD_PRIV_CODE

Specifies the default privilege code that the Document Transport Module uses if none is specified for uploading. The Document Transport Module verifies that the workstation serial number, document type, and user all have the proper privileges according to this preference. For optimization, always return this value from custom packages. If you use an implementation-specific application, create your own privilege code.

Values:

- A string of up to 200 characters
- FLDUPLD (default)

MVAS_DTM_UPLOAD_SUCCESS_PAGE

Specifies the URL to display when an upload is successful.

Values:

- A string of up to 200 characters
- URL (default)

MVAS_DTM_VIEWER_DNLD_AUTH_TIMEOUT

Specifies the time-out period, in seconds, within which the viewer must request a document image. The time out starts from the time the URL is requested. MarkView Viewer requests a document, then proceeds to retrieve it through the Document Transport Module. In this scenario, there is a time out associated with the requesting URL and the time within which it is valid. Security restrictions require that this limit be in place.

If the viewer is inside a fast network, MarkView Viewer might need a fraction of a second to process the request. If the viewer is outside a firewall on an external network, you might have to make additional allowances for network traffic.

Values: An integer ≥0, 0 (default)

MVAS_DTM_WORKSTATION_SERIAL_NO

Specifies the workstation serial number ID associated with the MarkView Document Transport Module. For a list of workstation serial numbers, select the Workstations tab in MarkView Administration. The Serial Number column in the Workstations > List page identifies the serial number IDs currently defined in your system.

The workstation serial number works in concert with associated platform, volume, and volume path values to locate and access MarkView documents on the Document Server.

Values: Workstation serial number, MVAS_DTM_1 (default)

See Also: WEBCLNT_WKSTN_SERIAL_NO

MarkView e-Invoice preferences

CONNECTOR_ADMIN_EMAIL

Specifies the email address of the person or account designated as the administrative contact for e-invoice processing issues. This email address is unrelated to the daily reminders that are sent to AP users who have e-invoice items in their Connector Review > Working Folder.

Values: An email address for your site (for example, einvoiceadmin@dexco.com)

CONNECTOR_DEBUG_MODE

Enables or disables the logging of debugging messages during e-invoice processing.

Values:

- TRUE (default): Enable
- FALSE: Disable

CONNECTOR_REVIEW_IMG_BASE_URL

Specifies the full URL of the Connector/Graphics directory. Set the URL in the following format, including a trailing slash:

http://GraphicsServerHost:GraphicsServerPort/graphics/connector/

Values: URL of the Connector/Graphics directory

MarkView Expense Management preferences

EXPENSE_REPORT_STATUS_BACKUP_ATTRIBUTE

Stores the value of the configurable field in the Oracle iExpense table ap_expense_report_headers_all.

Values: ATTRIBUTE1 through ATTRIBUTE15 (default)

MVEXP_ENABLED

If set to Yes, enables MarkView Expense Management. If No, disables Expense Management.

You can set this preference at the system or organization level.

Values: Y (default), N

MVT_BARCODE_CAPTION

If TRUE, displays the bar code value in plain text below the bar code.

Values: TRUE (default), FALSE

MVT_BARCODE_CHECKSUM

If TRUE, includes a checksum digit at the end of the bar code. The checksum validates the value of the bar code.

Values: TRUE (default), FALSE

MVT_BARCODE_FORMAT

Specifies the format of the generated bar code.

Values: 3 of 9, code 128 (default)

MVT_BARCODE_WIDTH

Specifies the width of the narrowest bar in a generated bar code.

Values: An integer, 2 (default)

MVEXP_CONCURRENT_APPROVAL

Controls the approval order for an expense report. This preferences applies to systems running Oracle Internet Expenses Mini-Pack J or earlier versions.

Regardless of concurrent approval settings, AP users can always access an expense report by querying the expense report number on the Expense Report form.

Values:

- N (default): Indicates that concurrent approvals are not allowed. An AP user cannot approve the report until manager approval is complete.
- Y: Allows concurrent approvals. This means that an AP approver can approve an expense report before manager approval is complete.

MVEXP_RECEIPTS_REMINDER_XX

Controls the reminders that are sent to users. When a user submits an expense report that requires receipts, but fails to submit receipts, Oracle Notifications can send reminders to the user. Configure the number and frequency of reminders using the MarkView suite preferences. These preferences take the form MVEXP_RECEIPTS_REMINDER_*nn xx*, where *nn* is a number from 01, 02, or 03, and *xx* is a number from 01 to 99 indicating the reminder notification countdown in hours.

For example, you might have three reminders:

MVEXP_RECEIPTS_REMINDER_01 4

MVEXP_RECEIPTS_REMINDER_02 24

MVEXP_RECEIPTS_REMINDER_03 48

If no receipts are received for the expense report, the preparer receives a reminder after 4 hours. If no receipts are received after 24 hours, a second reminder is sent. If no receipts are received after 48 hours, MarkView Internet Expense sends a third and final reminder.

Create additional reminder preferences by calling MV_Admin.AddMVPreferenceDefinition.

Values: The number of hours before Oracle Notifications sends the reminder

MVEXP_RECEIPTS_REQUIRED_FOR_AP_ONLY

Controls whether managers can approve expense reports before the submitter attaches receipts to the report.

Values:

- Y: Allows the AP approver to approve expense reports without the receipts attached.
- N (default): Does not allow the AP approver to see the expense report until related receipts are attached.

MVEXP_SKIP_LINES_WITH_MISSING_RECEIPTS

Specifies whether the system pauses expense processing until after receiving all receipts or skips lines that are missing receipts and continues processing.

Values:

- Y: Gets a count of all expense lines where the receipt_required_flag equals Y and the receipt_missing_flag is N.

  If the count is greater than 0, the ReceiptsRequireManager is Y. If the count is 0, the ReceiptsRequireManager is N.
- N: Gets a count of all expense lines where the receipt_required_flag equals Y and ignores the receipt_missing_flag.

  If the count is greater than 0, the ReceiptsRequireManager is Y. If the count is 0, the ReceiptsRequireManager is N.

MVEXP_UNMATCHED_PACKET_RETRY_COUNT

Specifies how many times MarkView Expense Management tries to match a receipts packet. This preference works in conjunction with the retry interval specified in MVEXP_UNMATCHED_PACKET_RETRY_PERIOD.

A bar code packet (receipts with a bar coded cover page) might not match any corresponding expense report work item. This should not happen during normal processing. However, if it does, MarkView Expense Management waits and tries again later to match the packet.

Values: An integer ≥0, 4 (default)

MVEXP_UNMATCHED_PACKET_RETRY_PERIOD

Specifies for how many hours MarkView Internet Expense waits before trying again to match an unmatched packet. This preference works in conjunction with the number of retries specified in MVEXP_UNMATCHED_PACKET_RETRY_COUNT.

Values: An integer ≥0, 6 (default)

MarkView Export Server preferences

MVAS_EXPORT_BASE_URL

Specifies the base URL of the export server. Use this value as the servlet address when creating an export queue assignment for the export server.

Values:

- A string of up to 200 characters
- Seeded URL (default)

MarkView Folder Desktop Edition preferences

FOLDER_DEFAULT_FOLDER_ID

Specifies a folder in which to place uploaded documents, if no folder is open for that purpose at the time of upload.

Values: A string of up to 200 characters, no default

FOLDER_REQUIRE_OPEN_FOLDER_FOR_NEW_DOCS

Specifies whether there must be an open folder for a document upload to occur.

Values: TRUE (default), FALSE

MarkView Folder preferences

SECURITY_REQUIRE_ACCESS_FOR_FOLDER_LIST

Specifies whether users must have security access to a folder to view the documents in the folder.

Values:

- TRUE (default): Users must have security access to the folder.
- FALSE: Users are not required to have security access to the folder.

MarkView for Oracle Applications preferences

ERP_ORACLE_LOGGING_LEVEL

Specifies the level of logging to use for tracking communication between MarkView and the ERP, for example, the extraction of user data or information about invoices from the ERP. Specifies what appears in the erp-oracle.log.

Values: OFF, FATAL, ERROR, WARN (default), INFO, DEBUG, TRACE, ALL

MVOA_DISABLE_SFXPNDQS_GETNEXT

When TRUE, disables the Get Next button on the Pending Queues form. Clicking this button retrieves the next work item into the Working Folder only. For some, this is an unexpected result. Disabling the button is a way to eliminate the confusion.

Values: TRUE (default), FALSE

MVOA_FNDATTCH_AUTO_LAUNCH

Determines the behavior when the Find Attachments (FNDATTCH) form retrieves a MarkView document type, with respect to automatically displaying the document image. You can set this preference at the system, group, and user level.

Values:

- ALWAYS: Always automatically start the viewer and display the document.

- ONE: Only automatically start the viewer and display the document if there is a single attachment, which is a MarkView document. The setting is ignored for any other attachment types.
- NEVER (default): Never automatically start the viewer and display the document.

MVOA_FNDATTCH_AUTO_MINIMIZE

Determines the behavior when the Find Attachments (FNDATTCH) form retrieves a MarkView document type, with respect to automatically minimizing the FNDATTCH form. You can set this preference at the system, group, and user level.

Values:

- ALWAYS: Always automatically minimize the FNDATTCH form when retrieving a MarkView document type.
- ONE: Only automatically minimize the FNDATTCH form if there is a single attachment, which is a MarkView document. The setting is ignored for any other attachment types.
- NEVER (default): Never automatically minimize the FNDATTCH form when retrieving a MarkView document type.

MVOA_USE_AUTHORIZED_DOCUMENT_ACCESS

When TRUE, prevents users from viewing the document who are unauthorized by the application. This is a way to prevent users from randomly browsing through document IDs to view documents.

Values: TRUE, FALSE (default)

MVOA_WF_ENABLE_GETNEXT

When TRUE, enables the GetNext button in the Working Folder.

Values: TRUE (default), FALSE

MVOA_WF_SHOW_ON_GETNEXT

When set to TRUE, clicking GetNext automatically opens MarkView Viewer with the next work item document displayed.

Values: TRUE (default), FALSE

MarkView Invoice Audit preferences

INVOICE_AUDIT_MAX_RESULTS

Controls the maximum number of lines in a .csv file that the Invoice Audit tool accepts when querying the ERP. If you upload a file with more than this number of lines, the Invoice Audit tool generates an error message. You can set this preference at the system level.

Values: a number from 1 to 20000, 5000 (default)

INVOICE_AUDIT_PRINT_QUEUE

Defines the print queue to use for batch printing. If this preference has no value set or if the queue does not exist, MarkView generates an error when you attempt to save the preference. You can set this preference at the system, group or user level.

Value: A string of up to 200 alphanumeric characters, DEFAULT_BATCH_QUEUE (default).

MVERP_SERVICE_LOGGING_LEVEL

Sets the logging level for ERP service messages. Specifies what appears in the erp-services.log.

Values: WARN (default), OFF, FATAL, ERROR, INFO, DEBUG, TRACE, ALL

MarkView Mobile preferences

MOBILE_HTTP_APPLICATION_URL

Defines the URL path for access to the MarkView mobile version.

Value: A string of up to 400 characters, /mobile (default)

MOBILE_LOGGING_LEVEL

Controls the logging levels for the mobile application. Sends information to the mobile.log file.

Sets the logging level for MarkView mobile messages.

Values: OFF, FATAL, ERROR, WARN (default), INFO, DEBUG, TRACE, ALL

MarkView Process Administration preferences

ADMIN_ACCESS_SF_ACTION

Specifies the type of access a user has to action administration.

Values: ALL, SELECT, NONE (default)

ADMIN_ACCESS_SF_APPLICATION_FUNCTION

Specifies the type of access a user has to application function administration.

Values: ALL, SELECT, NONE (default)

ADMIN_ACCESS_SF_DATABASE_OBJECT

Specifies the type of access a user has to database objects information.

Values: ALL, SELECT, NONE (default)

ADMIN_ACCESS_SF_EVENT_PROPERTY

Specifies the type of access a user has to event property administration.

Values: ALL, SELECT, NONE (default)

ADMIN_ACCESS_SF_EVENT_TYPES

Specifies the type of access a user has to event type administration.

Values: ALL, SELECT, NONE (default)

ADMIN_ACCESS_SF_MANAGER

Specifies the type of access a user has to manager administration.

Values: ALL, SELECT, NONE (default)

ADMIN_ACCESS_SF_MANAGER_EVENT_ASSIGNMENT

Specifies the type of access a user has to event assignment administration.

Values: ALL, SELECT, NONE (default)

ADMIN_ACCESS_SF_PREFERENCE
Specifies the type of access a user has to preference administration.
Values: ALL, SELECT, NONE (default)

ADMIN_ACCESS_SF_QUEUE
Specifies the type of access a user has to queue administration.
Values: ALL, SELECT, NONE (default)

ADMIN_ACCESS_SF_ROLE
Specifies the type of access a user has to role administration.
Values: LL, SELECT, NONE (default)

ADMIN_ACCESS_SF_ROLE_ACTION_AUTH
Specifies the type of access a user has to role action authorization administration.
Values: ALL, SELECT, NONE (default)

ADMIN_ACCESS_SF_ROLE_PREFERENCE
Specifies the type of access a user has to role preference administration.
Values: ALL, SELECT, NONE (default)

ADMIN_ACCESS_SF_ROLE_QUEUE_PRIVILEGE
Specifies the type of access a user has to role queue privilege administration.
Values: ALL, SELECT, NONE (default)

ADMIN_ACCESS_SF_ROLE_ROUTABLE_QUEUE
Specifies the type of access a user has to role routable queue administration.
Values: ALL, SELECT, NONE (default)

ADMIN_ACCESS_SF_SYSTEM_PREFERENCE
Specifies the type of access a user has to system preference administration.
Values: ALL, SELECT, NONE (default)

ADMIN_ACCESS_SF_USER_PREFERENCE
Specifies the type of access a user has to user preference administration.
Values: ALL, SELECT, NONE (default)

ADMIN_ACCESS_SF_USER_PROFILE
Specifies the type of access a user has to user profile administration.
Values: ALL, SELECT, NONE (default)

ADMIN_ACCESS_SF_USER_ROLE_GRANT
Specifies the type of access a user has to user role grant administration.
Values: ALL, SELECT, NONE (default)

ADMIN_ACCESS_SFS_REPOSITORY
Specifies the type of access a user has to SaveSet repository administration.
Values: ALL, SELECT, NONE (default)

ADMIN_DOC_BASE_URL

Specifies the URL where the documentation elements of the MarkView Process Administration, such as HTML pages and help graphics, are stored. If this value is not set correctly, The MarkView Process Administration can still function, but the online help does not appear when you click the Help button.

Values: A string of up to 400 characters, no default

ADMIN_IMG_BASE_URL

Specifies the URL where the GUI elements of the MarkView Process Administration, such as style sheets and button graphics, are stored. If this value is not set correctly, the MarkView Process Administration can still function correctly. However, each graphical element on the page will be displayed using the broken image symbol of your browser, and the text may appear in a different font than usual.

Values: A string of up to 400 characters, no default

ADMIN_WEB_CUSTOMER_LOGO_ALT_TEXT

Controls optional Alt Text that can be displayed when an MarkView Process Administration user places the mouse over the customer logo. This preference is ignored when no customer logo URL has been set.

Values: A string of up to 400 characters, no default

See also

- ADMIN_WEB_CUSTOMER_LOGO_LINK
- ADMIN_WEB_CUSTOMER_LOGO_URL

ADMIN_WEB_CUSTOMER_LOGO_LINK

Specifies the URL for the page to which the MarkView Administrator or MarkView Process Administrator is sent after clicking the customer logo. MarkView ignores this preference if no customer logo URL is set.

Values: A string of up to 400 characters, no default

See also

- ADMIN_WEB_CUSTOMER_LOGO_LINK
- ADMIN_WEB_CUSTOMER_LOGO_ALT_TEXT

ADMIN_WEB_CUSTOMER_LOGO_URL

Specifies the URL for a customer logo graphic. You can configure MarkView Process Administration to display the logo in the upper right-hand corner of the administration pages. Any logo used for this purpose should be exactly 30 pixels in height. To display the logo, set this preference to the complete URL for the location of the image. For example, your URL might look like this:

http://your.server.com:81/images/logo.gif

Values: A string of up to 400 characters, no default

See also

- ADMIN_WEB_CUSTOMER_LOGO_ALT_TEXT
- ADMIN_WEB_CUSTOMER_LOGO_LINK

MarkView Process Monitor preferences

To access these preferences, select **Administration** > **Process Admin** to access the Process Administration application.

MONITOR_HISTORY_DATE_FORMAT

Specifies the default date format for work item history display.

Values:

- MM/DD/YYYY HH:MI AM (default)
- DD/MM/YYYY HH:MI AM
- DD-MON-YYYY HH:MI AM
- MM/DD/YYYY HH24:MI
- DD/MM/YYYY HH24:MI
- DD-MON-YYYY HH24:MI
- MM/DD/YYYY
- DD/MM/YYYY
- DD-MON-YYYY
- HH24:MI:SS
- HH24:MI
- MM/DD/YYYY HH:MI:SS AM
- DD/MM/YYYY HH:MI:SS AM
- DD-MON-YYYY HH:MI:SS AM
- HH:MI:SS AM

MONITOR_HISTORY_DISPLAY_DETAIL

When set to Y, displays additional details columns in the Work Item History view.

Values: Y, N (default)

MONITOR_MINIMUM_REFRESH_RATE

Specifies the minimum polling period in seconds for the Process MarkView Process Monitor.

Values:

- An integer >0
- 10 (default)

MONITOR_READABLE_ONLY

Specifies whether users can edit existing configurations.

Values:

- TRUE: Configurations are read-only.
- FALSE (default): Existing configurations can be edited.

MONITOR_REFRESH_RATE

Specifies the default polling period in seconds for the Process MarkView Process Monitor.

Values:

- An integer >0
- 30 (default)

MONITOR_WEB_CACHE_TIMEOUT

Specifies for how many seconds the Process Monitor retains bar-graph data before re-querying the database.

Values:

- An integer >0
- 60 (default)

MONITOR_WEB_CUSTOMER_LOGO_ALT_TEXT

Controls optional Alt Text that can be displayed when a Process MarkView Process Monitor user places the mouse over the customer logo. This preference is ignored when no customer logo URL is set.

Values: A string of up to 400 characters, no default

MONITOR_WEB_CUSTOMER_LOGO_LINK

Specifies the URL for the page to which the Process MarkView Process Monitor user is sent when he or she clicks on the customer logo. This preference is ignored when no customer logo URL is set.

Values: A string of up to 400 characters, no default

MONITOR_WEB_CUSTOMER_LOGO_URL

Specifies whether a logo is displayed in the upper right corner of the Process MarkView Process Monitor window. Make any logo used for this purpose exactly 30 pixels in height. To display the logo, set this preference to the complete URL for the location of the image. For example, a logo URL might look like this:

http://your.server.com:81/images/logo.gif

Values: A URL string of up to 400 characters, no default

MONITOR_WEB_I8N_STYLESHEET

Specifies the font used to display characters. You must have Arial Unicode MS installed on the end user computer running Process MarkView Process Monitor to use this font.

Values:

- TRUE: Uses Arial Unicode MS.
- FALSE (default): Uses the default font Arial.

MONITOR_WEB_QUERY_TIMEOUT

Specifies for how many seconds the spreadsheet views (items in queue, work item history) remain active before timing out.

Values:

- An integer >0
- 300 (default)

MONITOR_WEB_SESSION_TIMEOUT

Specifies how many seconds elapse before the session times out.

Values :

- An integer >0
- 3600 (default)

MONITOR_WORKITEMS_DATE_FORMAT

Specifies the date format used in Process MarkView Process Monitor.

Values:

- MM/DD/YYYY HH:MI AM (default)
- DD/MM/YYYY HH:MI AM
- DD-MON-YYYY HH:MI AM
- MM/DD/YYYY HH24:MI
- DD/MM/YYYY HH24:MI
- DD-MON-YYYY HH24:MI
- MM/DD/YYYY
- DD/MM/YYYY
- DD-MON-YYYY
- HH24:MI:SS
- HH24:MI
- MM/DD/YYYY HH:MI:SS AM
- DD/MM/YYYY HH:MI:SS AM
- DD-MON-YYYY HH:MI:SS AM
- HH:MI:SS AM

PROCESS_MONITOR_LOGGING_LEVEL

Controls the logging output of Process MarkView Process Monitor.

Values: WARN (default), OFF, FATAL, ERROR, INFO, DEBUG, TRACE, ALL

MarkView Receipt Invoice Verification preferences

MVAP_RECEIPTS_HOLD_QUEUE_TIMEOUT

Specifies the number of days that an invoice remains in the Receipts Hold Queue. At the end of the timeout period, the invoice is processed to the next queue and populated to the ERP.

Values:

- An integer greater than 0
- 10 (default)

MVCN_DELETE_UNMATCHED_GRIV_LINES

Specifies whether MarkView changes the line structure type to "deleted" for unmatched invoice lines after an invoice leaves the Receipts Hold Queue.

Values: TRUE, or FALSE (default)

MVCN_AUTOCREATE_PO_LINE

Specifies whether MarkView creates a dummy line on a PO if the total invoice amount in the invoice header does not match the total of the invoice lines.

Values:

- TRUE (default): MarkView creates dummy lines. After processing, the invoice moves to the Interface Processing Error queue.
- FALSE: MarkView does not create dummy lines. After processing, the invoice moves to the Verify AP Process Complete queue.

MVERP_RECEIPTS_EXTRACTION_PERIOD

Specifies the length of the receipts export period in days, based on the posting date of the document.

Values: 183 (default), any integer greater than 0

MarkView Self-Service Invoice preferences

SSI_ALERT_AFTER_SUPPLIER_MAINT

When True, MarkView sends an email message to the requestor when Supplier Maintenance is complete.

Values: True (default), False

SSI_ALERT_ON_IMPORT_FAILS

When True, MarkView sends an email message to the requestor when invoice import fails.

Values: True (default), False

SSI_ALLOW_FUTURE_DATE

When True, an SSI user can create an invoice with a future date.

Values: True, False (default)

SSI_ALLOW_SUPPLIER_CREATE

When Yes, an SSI user can add a new supplier. When the user submits the new invoice, the SSI workflow submits the work item for Supplier Maintenance, where a member of the AP department adds or changes the supplier entry in Oracle Applications, if necessary. The work item is then routed back to the requester.

Values: Yes, No (default)

SSI_ALLOW_SUPPLIER_MODIFY

If Yes, the user can edit an existing supplier when they submit an invoice. See SSI_ALLOW_SUPPLIER_CREATE.

Values: Yes, No (default)

SSI_AUTO_CALC_TAX_DEFAULT

Specifies whether the Auto Calculate Tax check box is selected by default, or if MarkView uses the Supplier Site setting.

Values: Supplier Site (default),Yes, No

SSI_AUTO_EXPIRE_HOURS

Specifies the number of hours before the invoice request expires in a non-PO workflow.

Values: 96 (default), any integer

SSI_CREATE_TEMPLATE

Specifies if a user can assign an invoice or group of invoices to a template.

Values:

- Yes (default): Lets the user assign an invoice or group of invoices to a Template. This template can be opened to facilitate faster entry of recurring invoices.
- No: Prevents the user from creating templates, but lets the user open templates created by others.

SSI_EMAIL_ADDRESS

Defines the email address used when sending follow-up documents.

Values: A valid email address, no default

SSI_ENABLE_CUSTOM

When True, MarkView calls any custom procedures defined for SSI during processing.

Values: True, False (default)

SSI_ENABLE_FOLLOWUP_CONFIRMATION

When True, sends an email message to the requestor when a follow-up document is attached to the invoice.

Values: True (default), False

SSI_FOLLOWUP_EXPIRATION_ACTION

Defines the action to take when an invoice expires.

Values: ROUTE_TO_AP (default), CUSTOM, none

SSI_FOLLOWUP_REMINDER_01, SSI_FOLLOWUP_REMINDER_02, SSI_FOLLOWUP_REMINDER_03

How many hours between email reminders. MarkView sends reminders until it has sent all three reminders or it encounters a reminder with a value of 0.

Values: A numeric value; defaults:

- SSI_FOLLOWUP_REMINDER_01: 4
- SSI_FOLLOWUP_REMINDER_02: 24
- SSI_FOLLOWUP_REMINDER_03: 72

SSI_INVOICE_SOURCE

The name of the invoice source used to load invoices created by SSI.

> Changing this preference requires manual modification of the mvoa_ssi_import_processed_tr and mvoa_ssi_import_rejected_tr triggers. Kofax recommends against changing this preference value.

Values: MARKVIEW SSI (default), free text

SSI_LOGGING_LEVEL

Specifies the granularity of the logging messages written by the MVAS SSI Module. Specifies what appears in the mvssi.log.

Values:

- OFF: No messages logged.
- FATAL:Fatal error messages only. Recommended for production environments.
- ERROR
- WARN (default)
- INFO: Alerts when new sessions are established and terminated, when database connections are established and terminated, and when application threads are started and stopped. Recommended for test environments.
- DEBUG: For debugging purposes only. Should not be used without the direction of Technical Support and even then should only be set at the User Preference level for the user doing the debugging.
- TRACE: Shows the preference values used by each session as it is established and when a session changes to a new web page.
- ALL

SSI_LOV_RECORDS_PER_PAGE

Defines the number of records shown by default in long-list LOVs in SSI. When an Administrator uses the SSI interface to change this value, MarkView automatically creates a User-Level preference.

Values: 10 (default)

SSI_REDEFAULT_ON_SUPPLIER_CHANGE

Specifies whether to redefault the dependent fields such as Payment Currency if the user changes the supplier prior to submitting the invoice.

Values: Yes (default), No

SSI_REQUIRE_FOLLOWUP_FOR_APPROVAL

Specifies whether to require that a follow-up document be sent before the invoice goes to approval.

Values: True (default), False

SSI_TAX_ENTRY_MODE

Specifies the type of tax-related fields to display during invoice entry.

Values for R12:

- REGIME_TO_RATE: Show Regime to Rate Flow Tax Fields (default)
- STCC: Show Tax Classification Code for Direct Tax Rate Determination
- NONE: Do not show any tax fields

SSI_TEMPLATE_SECURITY

Defines the level of availability for user-defined templates.

Values:

- PER_USER (default): Allows only the user who created a template to open or modify the template.
- PER_GROUP: Allows any user who is a member of the group that has the template assigned to them to open or modify the template.
- NONE: Allows any application user to open or modify templates.

MarkView User Display preferences

MVT_HISTORY_SHOW_CURRENT_QUEUE

Controls the display of the current queue in the document details in MarkView Viewer (Line Type CURRENT_QUEUE).

Values: SHOW (default), HIDE

MVT_HISTORY_SHOW_DOCUMENT_CREATION

Controls the display of information about document creation in the document details in MarkView Viewer (Line Type DOCUMENT_CREATION).

Values: SHOW (default), HIDE

MVT_HISTORY_SHOW_MARKUP_DETAIL

Controls the display of action details in the document details in MarkView Viewer (Line Type MARKUP_DETAIL). Action details include who took the action and when, and in which views.

Values: SHOW (default), HIDE

MVT_HISTORY_SHOW_MARKUP_HISTORY

Controls the display of action history in the document details in MarkView Viewer (Line Type MARKUP_HISTORY). Action history is the message (if any) that results when the action is saved. For example, Donald Gray (DGray) took the Request Comment action and routed the work item to Casey Brown (CBrown) for approval with the following comments: "This looks okay to me. "

This preference is meaningful only if the MVT_RETAIN_MARKUP_HISTORY_MESSAGES preference is set to ALL; otherwise, there is no data to display.

Values: SHOW (default), HIDE

MVT_HISTORY_SHOW_WORKFLOW_HISTORY

Controls the display of workflow history in the document details in MarkView Viewer (Line Type WORKFLOW_HISTORY). This preference is meaningful only if the MVT_RETAIN_WORKFLOW_HISTORY_MESSAGES preference is set to ALL; otherwise, there is no data to display.

Values: SHOW (default), HIDE

MVT_HISTORY_SHOW_WORKFLOW_TRANSITION

Controls the display of workflow transitions in the document details in MarkView Viewer (Line Type WORKFLOW_TRANSITION).

Values: SHOW (default), HIDE

MarkView Viewer preferences

MAX_LIST_ROWS_ALLOWED

Determines the maximum number of rows that a list of values can contain.

Because the database needs to process all list values to return the data, the number of rows processed must be limited. If the returned value exceeds the preset maximum, the system displays an error message that you need to specify additional filter criteria.

Values: 500 (default), a number of 1 or higher

MVAS_CONTENT_MAX_DISTRIBUTIONS

Determines the maximum number of invoice lines and distributions displayed in the Accounting detail section of MarkView Viewer.

If the number of lines and distributions for an invoice exceeds the specified value, a user is not allowed to add more lines or distributions. Processing a large amount of lines and distributions for an invoice can consume considerable system resources.

If you reset this preference, you must restart the application server to activate the change.

Values: 100 (default), a number of 1 or higher

MVAS_CONTENT_MAX_FLEXFIELD_SEGMENTS

Determines the maximum number of accounting and Descriptive Flexfield segments configured in Oracle EBS for invoice lines and distributions.

For Descriptive Flexfield segments, the preference value includes all global segments and all context-sensitive segments. If the number of configured segments exceeds the specified value, an error appears when a user creates or modifies an invoice line or distribution.

If you update this preference, you must restart the application server to activate the change.

Values: 15 (default), a number of 1 or higher

MVOA_DFM_LOV_FILTER_ALL_FIELDS

Controls whether list filtering includes searching the description field in the Accounting segment and project lists. You can set this preference at the system level.

- TRUE: Includes the description field in the search.
- FALSE: Excludes the description field from the search. This value may improve viewer performance, depending on the lists in use.

Values: TRUE (default), FALSE

MVT_WEB_DOCUMENT_CHECK_SECURITY_CUSTOM

Specifies whether MarkView uses the MV_SECURITY_CUSTOM package to authorize users before displaying document links and icons.

Values:

- NONE (default): The viewer does not check MV_SECURITY_CUSTOM before displaying the document link and icon.
- HIDE_UNAUTHORIZED: The viewer checks MV_SECURITY_CUSTOM and does not display the document icon if the user is unauthorized to view the document. This setting prevents an unauthorized user from determining if the document exists.
- SHOW_UNAUTHORIZED_ICON: The viewer checks MV_SECURITY_CUSTOM and shows a special icon if the user is unauthorized to view the document. Users would be able to see that a document exists, but would be unable to access the document.

PDF_IMAGE_SCALE_METHOD

Regulates the image page size and specifies the image scaling strategy.

Values:

- noScale (default): Page size has the same size as the original image. The value of the PRINT_PAGE_SIZE preference is ignored for image pages.
- fitToPage: Images larger than the standard page size are shrunk to fit the page.

- scaleToPage: Small images are scaled up, large images are shrunk to the page size.

PRINT_PAGE_SIZE

Determines the image page size if the PDF_IMAGE_SCALE_METHOD preference is set to fitToPage or scaleToPage. The PRINT_PAGE_SIZE preference also determines the text (non-image) page size.

Values: A4, Legal, Letter (default).

SECURITY_AUTHORIZED_DOCUMENT_KEY_TYPE

Specifies the type of character set obfuscation used to conceal the document ID. Both types provide equal security, but Type 2 creates a longer string.

Values:

- Type1: Uses 128 character obfuscation
- Type2 (default): Uses 256 character obfuscation

SECURITY_AUTHORIZED_DOCUMENT_SYSTEM_ID

Specifies the MarkView System ID. This preference is specific to MarkView Viewer Web Edition. This value should be unique if a client computer needs to connect to multiple MarkView implementations. Having a unique key prevents one systems' document keys from being used on another.

Values: A string of up to 200 characters, MVPROD (default)

SECURITY_AUTHORIZED_DOCUMENT_TIMEOUT

Specifies the duration in seconds that the key specified in SECURITY_AUTHORIZED_DOCUMENT_KEY_TYPE remains valid. Specifying a low value for this preference creates the risk that authorization time-out before the viewer can retrieve a document from the database.

Values: 300 (default), an integer >0

SECURITY_AUTHORIZED_LOGON_TIMEOUT

Specifies the time in seconds that an authorization key remains valid. This preference is used when you specify a WEBCLNT_LOGON_STYLE of TERSE.

Values:

- A positive integer
- NULL (default)

SECURITY_ENFORCE_ACCESS_CONTROL

Determines whether MarkView Viewer uses document keys. Document keys prevent unauthorized users from cutting and pasting document URLs as a method of accessing documents. When FALSE, all users have access to any document image.

Values: TRUE (default), FALSE

SECURITY_MASK_ACCESS_VIOLATIONS

When TRUE, MarkView Viewer displays user friendly error messages in response to password violations. When FALSE, users see the underlying Java or package errors.

Values: TRUE, FALSE (default)

SECURITY_REQUIRE_ACCESS_TO_PRINT

When TRUE, users must have permission to access the document to print it.

Values: TRUE (default), FALSE

VIEWER_AUTO_PROCEED_MODE

Controls the page flow after a user takes an auto-proceed action. An auto-proceed action is generally considered to be one that causes the work item to transition in the workflow.

Values:

- CURRENT: Always redisplay the main viewer page for the document on which the action was taken.
- CALLER: Return to the calling application, Web Inbox for example, unless none is defined, in which case behave as CURRENT.
- NEXT_OR_CURRENT: Go to the next document in the list unless not working on a list or the current document is the last one in the list, in which case behave as CURRENT.
- NEXT_OR_CALLER (default): Go to the next document in the list unless not working on a list or the current document is the last one in the list, in which case behave as CALLER.

VIEWER_DEFAULT_IMAGE_ZOOM

Determines the default image zoom.

Values:

- FIT_TO_HEIGHT: Set the default image zoom to fit height.
- FIT_TO_WIDTH (default): Set the default image zoom to fit width.
- FIT_TO_WINDOW: Set the default image zoom to fit the window.
- RECENT_ZOOM_PERCENTAGE: Set the default image zoom to the recently used zoom level.

VIEWER_DISABLE_DISTRIBUTION_ACTION

Specifies whether to disable the invoice distribution action buttons in MarkView Viewer. When TRUE, the distribution action buttons (edit, delete, and copy) are disabled.

You can set this preference at the system or user level.

Values: TRUE, FALSE (default)

VIEWER_ENABLE_SAVE_IMAGE_ROTATION

Specifies whether employees have the option to save their image rotation settings.

Values: TRUE, FALSE (default)

VIEWER_EMAILDOC_INTERNAL_DOMAINS

Specifies the domains to which an employee can send only an email link, not a PDF attachment. For example, if you set this preference to "mycompany.com,Kofax.com" email sent to abc@mycompany.com or abc@Kofax.com can contain only a link, not a PDF attachment. The employee using the Email Document feature does not need to be in the same domain.

If you reset this preference, you must restart the application server to activate the change.

Values: A set of valid email domains separated by a comma, no default

VIEWER_HTTP_BASE_URL

Specifies the HTTP base URL of MarkView Viewer.

Values: http://(appserver):(port)/viewer (default)

VIEWER_IMAGE_CACHE_SIZE

Specifies the number of full-size page images to cache in the viewer.

Values: 10 (default), a number of 1 or higher

VIEWER_INCLUDE_DOWNLOAD

Specifies whether to include an image download option on the toolbar menu.

Values: TRUE (default), FALSE

VIEWER_INCLUDE_EMAIL

Specifies whether to include an email request option on the toolbar menu.

Values: TRUE (default), FALSE

VIEWER_INCLUDE_PDF_EXPORT

Specifies whether to include the option for a user to email a PDF attachment from the viewer.

Values: TRUE (default), FALSE

VIEWER_INCLUDE_PRINT

Specifies whether to include a print option on the toolbar menu. Clicking this button prints the document and history directly to a local printer.

Values: TRUE (default), FALSE

VIEWER_INCLUDE_PRINT_REQUEST

Specifies whether to include a print request option on the toolbar menu. Clicking this button queues the print request for servicing by the MarkView Print Server.

Values: TRUE (default), FALSE

VIEWER_LOGGING_LEVEL

Specifies the log level for viewer components. Specifies what appears in the viewer.log.

Values: ERROR, WARN (default), INFO, DEBUG, TRACE, ALL

VIEWER_SHOW_ANNOTATIONS_TOOLBAR

When set to TRUE, displays the Annotations toolbar in MarkView Viewer.

You can set this preference at the system or group level.

Values: TRUE (default), FALSE

VIEWER_THUMBNAIL_CACHE_SIZE

Specifies the number of thumbnail images to cache.

Values: 25 (default), a number of 1 or higher

WEBCLNT_IMG_BASE_URL

Specifies the URL of the GUI elements of the viewer, such as style sheets and tab and button graphics. If this value is not set correctly, the viewer can still function, but each of the graphical elements on the page uses the broken image symbol of your browser, and text may appear in a different font than usual.

Values:

- A string of up to 400 characters
- NULL (default)

WEBCLNT_HTTP_BASE_URL

Specifies the base URL for the database access descriptor. It is used as the prefix for references in the control window, making MarkView Viewer available from other MarkView suite applications.

Values:

- A string of up to 200 characters

- NULL (default)

MarkView Web Folder preferences

WEBFLD_ALLOW_FILE_UPLOAD

If TRUE, enables users to upload native files from Web Folder.

Values: TRUE, FALSE (default)

WEBFLD_ALLOW_FILTERS

If TRUE, enables users to filter on documents in Web Folder.

Values: TRUE (default), FALSE

WEBFLD_ALLOW_ORDER_FOLDER

If TRUE, enables users to specify the order of documents in Web Folder.

Values: TRUE, FALSE (default)

WEBFLD_ALLOW_SORTING

If TRUE, enables users to sort documents in Web Folder by Description, Type, or Date.

Values: TRUE (default), FALSE

WEBFLD_ALLOW_UNFOLDER

If TRUE, enables users to remove documents from Web Folder.

Values: TRUE, FALSE (default)

WEBFLD_DOCS_PER_PAGE

Sets the default number of documents to appear in a page view. If the user changes the value in the folder list view, the changed value becomes the default. To display a continuous scrolling list, specify a numeric value or ALL.

Values: A string of up to 200 characters, 20 (default)

WEBFLD_DOCS_PER_PAGE_MODE

Establishes how documents per page is enforced.

Values:

- MANDATORY: Enforces the system-level value of the WEBFLD_DOCS_PER_PAGE preference and disables the per-page control in the folder list view.
- DEFAULT (default): Accepts the user-level value of the WEBFLD_DOCS_PER_PAGE preference, which can be changed by the user using the per-page control in the folder list view.

WEBFLD_FILES_PER_UPLOAD

Sets the number of files that can be uploaded at one time.

Values: An integer ≥0, 3 (default)

WEBFLD_IMG_BASE_URL

Specifies the location of MarkView graphics for Web Folder.

Values: A string of up to 200 characters, no default

WEBFLD_SHOW_NON_MV_DOCS

If TRUE, Web Folder displays both MarkView and native documents; otherwise, only MarkView documents appear.

Values: TRUE (default), FALSE

WEBFLD_USE_DOCUMENT_KEY

If TRUE, Web Folder uses encrypted keys when starting documents; otherwise, document IDs are unencrypted.

Values: TRUE, FALSE (default)

MarkView Web Inbox preferences

MVT_WIB_ALLOW_APPROVE

Determines if approval from the Web Inbox is available.

To enable the multiple approval feature, set this preference to TRUE for the group that will have access to this feature.

Values: TRUE, FALSE (default)

MVT_WIB_API_GET_NEXT

Determines the Get Next Functionality to show.

Values: NONE (default)

MVT_WIB_API_MAX_RECORDS

Determines the maximum number of records a web inquiry query is allowed to return. Queries over the limit will be rejected.

Values: 400 (default)

MVT_WIB_API_QUERY_DEBUG

Determines if the primary query used to generate the Payables Web Inbox result sets are displayed.

Values: HIDE (default)

MVT_WIB_API_SORT_TYPE

Specifies if inquiry sorting is done on the client or the server.

Values: CLIENT, SERVER (default)

MVT_WIB_APPROVE_FORM_NAME

Specifies the name of the Form Markup rendered on the document when approval through the Web Inbox is selected.

Values:

- A string of up to 2000 characters
- NULL (default)

MVT_WIB_APPROVE_VIEW_NAME

Specifies the name of the View Type used on the document when approval through the Web Inbox is selected.

Values:

- A string of up to 2000 characters
- NULL (default)

MVT_WIB_COLOR

Specifies the color used on MarkView Web Inbox pages.

Values: 03B68 (default)

MVT_WIB_GET_NEXT

Determines the Get Next Functionality to show.

Values: NONE (default)

MVT_WIB_SELECT_QUEUE

Specifies if the user can select a specific queue when pending or get next is allowed.

Values: TRUE, FALSE (default)

MarkView Web Inquiry preferences

MVT_WIQ_API_ADV_QUERY_FIELDS

If set to Y (yes), the advanced query fields appear on the Web Inquiry search page by default. Otherwise, only the basic fields appear on the page. You can set this preference at the system, group, and user levels.

Values: Y, N (default)

MVT_WIQ_API_BATCH_EMAIL

This preference is deprecated.

MVT_WIQ_API_BATCH_FAX

This preference is deprecated.

MVT_WIQ_API_BATCH_PRINT

Determines which batch print options are available to the user. Use this preference to set printing capabilities on the Web Inquiry page of MarkView for Accounts Payable.

Values:

- ALL: Web Inquiry displays the Batch Print All button. Users can print all of the documents returned by a search.
- SELECTED: MarkViewWeb Inquiry displays the Batch column and the Batch Print Selected button on the Web Inquiry page. Users can select and print documents returned by a search.
- ALL OR SELECTED: MarkViewWeb Inquiry displays both the Batch Print All and the Batch Print Selected buttons. Users can print all or selected documents.
- NO (default): No printing is permitted from the Web Inquiry page.

MVT_WIQ_API_MAX_RECORDS

Specifies the maximum number of records that a web inquiry query can return.

Values: 400 (default)

MVT_WIQ_API_QUERY_DEBUG

Determines what debugging information is available to the user. Use this preference to view queries and step through the processes that run the MarkView Web Inquiry component of MarkView for Accounts Payable.

Values:

- SHOW: Web Inquiry displays and automatically runs queries.
- HIDE (default): Web Inquiry automatically runs queries and does not display debugging information. In most cases, you should choose this setting.
- SHOW_ONLY: Web Inquiry displays queries and waits for user approval before running the query.

MVT_WIQ_API_SECURITY

Specifies whether MarkView Web Inquiry calls a non-standard security procedure.

Values:

- NONE: MarkView Web Inquiry uses default MarkView security.
- WHERELEVEL: MarkView(default) Web Inquiry calls a non-standard security procedure.

MVT_WIQ_API_SORT_TYPE

Determines whether inquiry sorting takes place on the server computer or the client computer.

Values: SERVER (default), CLIENT

MVT_WIQ_COLOR

Specifies the color used on MarkView Web Inquiry pages.

Values: 0071B9 (default)

Chapter 21

Troubleshooting guidelines

This chapter describes common issues, potential causes, and actions to take to resolve the issues.

Solve issues with user functions

If MarkView User Groups and Roles are set up incorrectly, your users might encounter problems accessing or viewing MarkView documents and interface elements. For example:

- A menu item is not available in MarkView home.

  In Module Admin, check the Menu Item Group Auth table and confirm the user group assigned to the menu. In Markview Admin, verify that the user is a member of that group.
- An AP processor receives a "no items pending" message even when MarkView has items pending.

  In Process Administration, verify that the user's role has the retrieval privilege for the queue and that work items are pending for the user.
- A Markup is not available in the viewer.

  In MarkView Administration, check the Tool Privilege Auths for the missing tool. Ensure that the user is assigned to a group that has access to the tool.
- A user cannot see work items in the Process Monitor.

  Use Process Administration to ensure that the user has roles enabled that have the examine privilege authorized for the Process Monitor.

Identify common AP Entry mistakes

- Clicking Get Next too frequently

  Causes unattached documents to end up in the AP Working Folder
- Placing transitional actions too early

  Causes an error message because the work item is not attached to a header; for preapproved, the item is not fully distributed or matched to a PO.
- If no transitional action is taken

  Causes the invoice to remain in the Working Folder.

Resolve email and print issues

Email

Problems trying to email PDF documents can be related to permissions. For example, the configured servlet user name does not have the proper authorizations.

To test, ensure that the export user can open and view the document being exported. If this user cannot authenticate or does not have permission to view the document, the export operation fails. The export user must be able to log in to MarkView.

Print (for WebLogic 12.1.3 only)

With MarkView Viewer on the WebLogic 12.1.3 application server, the following error appears in the log file when you try to generate a print request to the server:

```
java.awt.print.PrinterException: No print services available
```

To correctly configure the printer feature, do the following:

1. Log in to the WebLogic Server Administration Console.
2. In Domain Structure, expand **Environment** and select **Servers**.
3. In the Configuration tab, select **markview_server**.
4. On the Settings for markview_server page, select the **Server Start** tab.
5. In the Arguments field, add the following to the end of the line:
   `-DUseSunHttpHandler=true`
6. Save changes and restart the server.

Investigate workflow issues

- If you are unsure as to why invoices are routed to a particular queue, for example, workflow admin, check the preference settings and selections made during Organization Setup. To determine what caused a work item to be routed to the Workflow Admin queue, use the Process Monitor to view the Work Item History. The last transition includes the error that caused the work item to be routed to the Workflow Admin queue.
- A user name changed in an Oracle HR record
  - Work items assigned under the original user name cannot be accessed.

    To solve this issue, assign the new user name in MarkView as the alternate to the original user name. (MarkView retains both user names.)
  - Work items that are in-process and need approval at the next level in the hierarchy are routed to the Workflow Administration queue. This occurs because the system cannot determine the next Approver in the hierarchy.

To solve this issue, for the new MarkView user name, change the MVERP_USE_ALTERNATE_AUTHORITY preference setting at the user level to **ALL** and route the affected work items back to the previous queue. Once all work items that were put into process under the original user name finish processing, you can change the preference setting.

Address performance issues

- If your site experiences performance slow-downs and sporadic Java Virtual Machine (JVM) crashes preceded by a slow-down, try restarting the MarkView Application Server on a weekly basis. Doing so refreshes the runtime environment.
- If your site processes large batches and experiences excessive memory usage that result in performance slow-downs, verify that the MarkView preference SPLIT_DOCUMENTS is set to TRUE (default).

  When set to FALSE, this preference instructs the connector to combine all pages from all images into a single multi-page image, which leads to excessive memory use.

Verify the state of MarkView and the viewer

1. Log in to MarkView and navigate to **Administration** > **Verify MarkView**.
2. Click one of the show-document icons.

   MarkView Viewer opens and displays the MarkView icon or a blank document. Both MarkView and the viewer are running if the document image opens in MarkView Viewer.

MarkView Viewer displays an error about the number of pages

If the viewer displays an error that the number of pages should never be less than 1, check the viewer workstation settings as follows.

1. Log in to MarkView and navigate to **Administration > MarkView Admin**.
2. Select the **Workstations** tab.
3. Locate **MarkView Express** and click **Details**.
4. In the Details window, verify that the Serial Number is **EXPRESS**. Any other entry in this field prevents the viewer from functioning.
5. Change the field entry to **EXPRESS** and click **Save**.

Find a lost invoice

Use the Process Monitor to locate lost invoices. For information about using the Process Monitor, see Monitor queues with Process Monitor on page 120.

View Expense Reports after an AP import

If you import an AP Invoice and then purge Expense Reports, the Expense Report summary information still appears in Expense Home, with a link to View Receipts. When you click the link, however, you not see the receipt document because the Expense Report was purged from Oracle.

Logging resources

This section provides pointers to logging resources available across MarkView.

Capture and Output components

As a Windows service, MarkView Bar Code Server uses the Event Viewer application for logging.

The log files for Import Server, Import Server API, Data Export Server, and Mail Gateway are located in the `<path>/logs` folder, where `<path>` is the location where you installed these components.

> The debug logging level is enabled by default.

Applications log

The application server log files are located in the `<path>/log` directory, where `<path>` is the location where you installed MarkView.

For information about setting up the log files location, see the *Kofax MarkView Installation Guide*.

MarkView Self-Service Invoice (SSI), another Application Server application, is a separate product. The Self-Service Invoice log files are located at `<path>/<ssi_instance_name>/log`.

MarkView installation

The MarkView installer records up to four log files during installation. For information about these log files, see the *Kofax MarkView Installation Guide*.

Clear the log files

Log files can grow exponentially, which can degrade performance, and can be difficult to analyze when investigating issues. For the best results, perform regular maintenance on the log files.

Archived log files provide an historical record that allows you to establish a baseline, detect patterns, and so forth, but eventually they outlive their usefulness. Determine a suitable retention period after which you purge archived files.

1. Establish a volume threshold at which to roll over the log file (20 MB, for example).
2. When the log file reaches the threshold, stop the process or application that is generating the log.

3. Move the log file to an archive directory. Use a timestamp naming convention to identify the period of logging activity covered.
4. Later, go back and condense archived files (zip or tar) for more efficient storage and portability.

Synchronize password changes

Many corporate IT policies require periodic password changes for the database schemas and administrator accounts. Implementing such a policy with the MarkView schema and MarkView Administrator account passwords impact many MarkView suite components. Propagate the password changes across the following components:

- All MarkView Capture and Output components.
- All application servers where a MarkView data source is defined.

Update the MarkView schema password on the WebLogic application server

Update your Connection Pool in the WebLogic Console.

1. Log in to the WebLogic Server Administration Console and navigate to **Domain Structure** > **Services** > **Datasources**.
2. Select the **MarkViewDS** data source and click the **Connection Pool** tab.
3. Update the Password and Confirm Password fields.

Update the MarkView schema password on the WildFly application server

Update your Connection Pool in the WildFly Console.

1. Log in to the WildFly Administration Console and navigate to **Configuration** > **Datasources**.
2. Select the **MarkViewDS** data source and click the **Security** tab.
3. Click **Edit** and update the Password and Confirm Password fields.

Update Capture and Output component passwords

After changing the MarkView schema password

If you changed the MarkView Schema password, complete the procedures in this section.

Update the MarkView Import Server password

1. Stop the **MarkView Import Server** service.
2. Launch the **MarkView Import Server - Configuration** tool.
3. Select the import server you are using and click **Preferences**.
4. In the Database Password field, enter the new password.
5. Click **Test DB** to verify your entry.
6. Click **OK**.

Update the MarkView Data Export Server password

1. Stop the **MarkView Data Export Server** service.
2. Launch the **MarkView Data Export Server - Configuration** tool.
3. Select the export server you are using and click **Preferences**.
4. In the Database Password field, enter the new password.
5. Click **Test DB** to verify your entry.
6. Click **OK**.

Update the MarkView Barcode Server password

1. Stop the **Barcode Server** service.
2. Open the **MarkView Barcode Server - Configuration** tool.
3. Select the instance that you are running and click **Preferences**.
4. In the DbPassword field, enter the new password.
5. Click **Test** to verify your entry.
6. Click **OK**.

Update the MarkView Mail Gateway password

1. Stop the **Mail Gateway** service.
2. Open the **MarkView Mail Gateway - Configuration** tool.
3. Select the instance that you are running and click **Preferences**.
4. In the Database Password field, enter the new password.
5. Click **Test DB** to verify your entry.
6. Click **OK**.

Update theKofax MarkView Export Connector password

1. Run the **MVImportAPIConfig.exe** file.
2. Select the **MarkView Import API Configuration** and click **Preferences**.
3. In the Database Password field, enter the new password.
4. Click **Test DB** to verify your entry.
5. Click **OK**.

Update the Kofax Transformation Modules password

1. On the Capture and Output server, on the Start menu, select **Programs** > **Kofax Transformation** > **Project Builder**.
2. Open the project that is synchronized with your batch.
3. On the menu bar, select **Project** > **Script Variables**.
4. Update the DatabasePWD script variable.
5. Click **OK**.

Update the Relational Database passwords

If your project settings in Kofax Capture include any relational databases, update those passwords as follows:

1. In Kofax Capture, right-click the project name and select **Project Settings**.
2. Click the **Databases** tab.
3. Select a relational database line, for example, LimLockDB, and click **Properties**.
   See the Database Type column to identify relational databases.
4. Next to the Connection String field, click **Configure**.
5. In the dialog box that opens, update Password.
6. Click **Test Connection**.
7. Click **OK**.

   After updating passwords in Kofax Capture and Kofax Transformation Modules, synchronize and publish the project in Kofax Capture.

Update the Database Validation Properties in Kofax Capture batch classes

1. In Kofax Capture Administration, expand each Batch Class.
2. Right-click the Document Type and select **Database Validation**.
3. Click **Properties**.
4. In the Password field, enter the new password.
5. Click **OK**.

Request denied due to unacceptable characters

If you attempt to enter unsupported characters or words in MarkView entry fields, the following message appears:

```
Request has been denied due to unacceptable characters in the input.
```

You can resolve the issue by removing the following unsupported characters or words from the entry.

Unsupported Characters/Words	Description
<	Less than symbol
>	Greater than symbol
"	Opening or closing quotation mark
#	Number sign
background:url	Reserved word
javascript	Reserved word

Chapter 22

Tune component performance

A MarkView implementation involves many components working together. This section provides information about some of the more common problems and their solutions.

Performance issues and measurements

If you encounter performance issues, use the following metrics and performance statistics to localize the source of your issue. The Technical Support team may also ask for this information if you enter a support call.

- Server and viewer products: The most common performance problems are network related. Network traces that show the amount of time it takes for a request to be sent and processed are helpful. For upload and download issues, combine the amount of time it takes to download and upload a document image with a network trace.
- MarkView Web Inbox and Invoice Inquiry type applications: You can provide data about execution times for the SQL statements that the packages call within the database.
- MarkView Process Manager performance: Issues directly relate to the number of events being created coupled with processing time. Processing time can be high if the SQL queries executed in the rule code are not properly tuned.

Performance monitoring tools

When you track performance in your MarkView implementation, use the Trace Route (tracert) command to determine the network route from one host to another. For example, use this command to determine if a router is down.

Although tracert can be effective, it only provides the theoretical route between the client and the host. The actual route can vary based on network utilization. To be accurate, ping from a UNIX machine back to the PC using the -R option to record the route taken, but only if your network devices support this option.

Use this utility for basic performance checks. For more information about your network, contact your network operations organization.

Starting points

To improve and tune performance, look at the following applications and systems, which are the most likely cause of difficulties:

- MarkView Viewer
- Application server
- Get Next button in the Oracle Applications
- MarkView Process Monitor (for queues with large number of items)
- MarkView Process Manager (when catching up after spinning)
- Wide Area Networks
- Firewalls

Database tuning

If you tie your performance issues to your database, consider the transactions that take place, and the timeline along which events occur.

Database transactions

- Authentication
- MarkView Accounting Details tool usage
- Other general actions
- HTTP user authentication
- Application server-DB user session initialization
- User groups
- User Action tools
- Session logging
- Application server-DB user session transactions
- Taking actions

User session transactional timeline

The following time shows the database transactions that take place during a typical viewer session. Use this information to observe, test, and identify events as they occur within your database.

- Client sends HTTP request
- Application Server issues an authentication challenge
- Client sends authentication credentials
- Response sent to client
- MarkView Viewer
  - Application server DB execution
  - Application server fetches TIFF from Document Server, renders as PNG

- Application server response with document metadata and rendered document

Appendix A

Kofax Capture guidelines

The guidelines in this appendix are intended as a reference to help ensure your success when processing documents through Kofax Capture, including Kofax Import Connector and Kofax Transformation Modules. Use these guidelines as a supplement to the Kofax Capture documentation.

Guidelines for Scan operators who submit invoices via email

Stamps
Avoid stamping the document. If stamping is necessary, try to stamp invoices in the same place and avoid placing stamps over or near the printed text of the document.

Signatures/Handwriting
Avoid signatures or other writing on the document. If writing is necessary, try to write on invoices in the same place and avoid writing over or near the printed text of the document.

Watermarks
Avoid documents with watermarks.

Batch Size
The number of pages in each batch should not exceed 200 pages.

Guidelines for Scan operators

VRS Profiles
If you submit an invoice that is different from other invoices received (color of paper/font, paper weight), you may need to create a VRS Profile for invoices to normalize the process.

Scanning
When scanning, use a resolution of 300x300 dpi.

Guidelines for vendors who submit invoices via email

Image Resolution

You must capture invoices at a resolution of 300 dpi.

- If you capture a document with a lower resolution, it is converted to 300 dpi after received. In this case the lower resolution of the original image affects the converted image quality.
- If you capture a document with a higher resolution, it is converted to 300 dpi after received. As a result, any benefits of the higher resolution are not applicable.

Image Quality

If the image quality is poor or the document is hard to read, in most cases the Kofax Transformation Modules extraction results may be less successful than with a better quality image.

Before sending a document, verify that the text on the image is easily legible. If the image text is fully or partially illegible, the document should be rescanned. It may take time to identify the appropriate scanner settings to ensure the required image quality results.

Image Color

Images should be black and white, not color.

While color images can be successfully emailed to Kofax Capture and processed, all color images are converted to black and white after they have been received. By capturing images in black and white initially, the image size is reduced (requiring less network bandwidth during the delivery of the email) and the Kofax Capture system spends fewer resources converting the image to black and white.

Supported Attachment Formats

- PDF
  - Adobe PDF images can vary widely in size based on quality settings and color. These images will be converted to TIFF (black and white) after they have been received. For this reason, we recommend that you create PDF files in black and white.
  - Do not use Adobe Acrobat 8 or 9 Standard Edition with compression to generate a PDF document.
- Microsoft Word, Microsoft Excel

  Microsoft Office 2007 compatible documents are supported when Kofax Import Connector is configured to be used with Microsoft Office. When sending files in these formats, consider the following details.
  - When converting a source document to the TIFF file format, the default print settings are used.
  - If a document includes any custom fonts, MS Office substitutes them during the conversion process. Verify that standard fonts are used.
  - If a document is password-protected, the conversion process fails. Verify that the submitted invoices are not password-protected.
  - Macros may cause the conversion process to fail. Verify that the submitted invoices do not contain macros.
- TIFF images
  - CCIT Group IV is the only TIFF image type supported for conversion. Do not use TIFF format if you cannot create a CCIT Group IV TIFF image.

- The size of the TIFF file should not exceed 800 KB.
- The dimensions of the TIFF file should not exceed 4000 px or 3000 in in width.

- Compressed files

  Any compressed file, such as a zip file, causes an error in the conversion process.

Camera pictures
Avoid submitting invoices captured via a camera.

Multiple attachments per email
Each attachment is considered as a separate invoice document. Verify that a user understands how to handle multiple attachments.

Mail server restrictions

If the mail server has restrictions on email attachments (size, formats), you must be aware of these restrictions. For example:

- Mail administrators may set a limit on size of the email.
- Mail administrators may restrict the list of permitted attachment types.

Appendix B

Synchronous and asynchronous events

MarkView classifies events as asynchronous or synchronous. This appendix describes the difference between event types and how MarkView processes them.

Asynchronous events

The MarkView system processes asynchronous events in the following separate database sessions:

1. An event is alerted in the first database session (for example, in a viewer session when a user takes an action). Within that session, the system records the event and the event property values in database tables. Then, the system commits the transaction.
2. MarkView Process Manager runs within its own database session. The MarkView Process Manager periodically polls database tables, searching for new events. Upon finding a new event record, the MarkView Process Manager examines the recorded events and property values, and runs any triggered workflow rules. When processing is completed, the MarkView Process Manager commits the transaction.

The MarkView Process Manager reports errors to the Process Manager log. If an error occurs and the event is associated with a work item, the work item transitions to the Error queue.

Synchronous events

The MarkView system processes synchronous events in the current database session. All of the rule logic associated with the event is executed in the same database session as the process that alerted the event. If the rule logic contains time-consuming SQL queries or if there are many rules to execute, this database session can be busy for a long time.

If an error occurs and the event is associated with a work item, the item transitions to the Error queue. If the event is not associated with a work item, the standard exception NO_DATA_FOUND is raised back to the process that alerted the event.

Changes in MarkView Process Manager

The current version of the MarkView Manager runs as a database job (Oracle DBMS_SCHEDULER job) and therefore has no operating system dependencies. The MarkViewProcess Manager runs from within the context of a database session under the MARKVIEW database schema.

This version polls for events to process, executes the rule code associated with those events, and records these actions in the database.

Appendix C

Remove MarkView from the Oracle E-Business Suite

Remove MarkView personalizations from the Supplier form

When you install the MarkView Oracle objects, MarkView personalizes the Supplier form. To remove the personalizations:

1. Log in to Oracle Applications as the Functional Administrator.
2. Navigate to **Personalizations** > **Import/Export**.
3. In the **Personalization Repository** window, navigate to `/oracle/apps/pos/supplier/webui/customizations/site/0/`.
4. Select each of the following site-level customizations and click **Delete**:
   - OrganizationPG.xml
   - QuickUpdatePG.xml
   - SuppCrtPG.xml
   - SuppSummPG.xml

Remove MarkView from Oracle Internet Expenses

To help resolve support issues, Technical Support may ask you to remove MarkView software from your Oracle installation. This section describes how to remove the MarkView software from an installation of Oracle Internet Expenses.

Replace modified Oracle forms

MarkView uses modified versions of default Oracle forms. To restore a standard Oracle Internet Expense installation, you must restore the original forms. From the MarkView for Oracle Applications database objects, run the following scripts:

SFXINWKB_Undo.sql

SFXXXEER_Undo.sql

These scripts repoint all form functions from the modified versions of the forms back to the shipped version of the forms.

Remove Integration Points from the APEXP workflow

The APEXP workflow integrates with the MarkView suite at a number of points. Each procedure in this section removes an integration point.

Open the APEXP workflow

1. Open the Oracle Workflow Builder.
2. Select **File** > **Open**.
3. Select Database and enter the APPS database Username, Password, and Connect String information (the Effective text box can be left blank) and click **OK**.
4. In the **Hidden** list, select **Expenses** and click the **Back** button (<<). Expenses appear in the **Visible** list.

   In some versions of Oracle Applications, this workflow is called "AP Expense Report."
5. Click **OK**.

   The expenses appear in a tree structure.
6. Expand the tree to display all of the options under the Expenses menu tree.

Remove MarkView system activities

1. Open the process: **AP Standard Expense Report Process**.
2. Click **SQL*Flow Initialize** and click **Delete**.
3. Reconnect the two activities connected by SQL*Flow Initialize by right-clicking the first activity and dragging and dropping onto the second. If the transition requires a result code, select the appropriate transition from the list.

Remove MarkView system functions

1. Expand the Functions section in Navigator.
2. Select the **SQL*Flow Initialize** function and click **Delete**.

   A confirmation window opens.
3. Click **OK** to confirm the deletion.

Delete MarkView systems messages

> If the Systems Receipts Reminder Message was ever sent, you cannot delete it. The system generate an error. Ignore the error and save the workflow. The second time it save without incident.

1. Expand the Messages section in Navigator.
2. Select the message **Remind Employee Send Receipts Message** and click **Delete**.
3. Click **OK** to confirm the deletion.

Delete the Document Link attribute

1. Expand the Messages section in Navigator.

2. Expand the properties for the Request Expense Report Approval Message.
3. Select and delete the **Document Link** attribute.
4. Repeat the preceding steps for other messages that contain the Document Link.
   The following table lists the old and new names of seeded messages changed by Oracle.

Document Link Seeded Messages

Old Name	New Name
Inform Employee Expense Report Submitted by Preparer Message	Inform Individual that Expense Report Submitted by Preparer
Inform Preparer Missing Receipts Shortpay Message	Inform Preparer of Policy Non-Compliance for Missing Receipts
Inform Preparer Policy Violation Shortpay Req More Info Message	Inform Preparer of Policy Non-Compliance for Missing Receipts
Request Employee Approval Message	Individual's Approval Message Request
Verify With Manager Approval Amount Message	Verify With Manager Amount Approved With Company Violations

The following messages remain unchanged across different Oracle versions:

- Request Expense Report Approval Message
- Expense Report Rejection Message
- Request AP Review Policy Message
- Inform AP Mgr Has Approved Shortpay With No Receipts Message

Deleting the Bar Code Link attribute from Seeded Messages

1. Expand the Messages section in Navigator.
2. Expand the properties for Inform Preparer Missing Receipts Shortpay Message.
3. Select and delete the **Bar code attribute**.
4. Repeat the preceding steps for other messages that contain the "Bar code attribute."
   The following table lists old and new message names of seeded messages changed by Oracle.

Bar Code Link Seeded Messages

Old Name	New Name
Inform Preparer Missing Receipts Shortpay Message	Inform Preparer of Policy Non-Compliance for Missing Receipts
Inform Preparer Policy Violation Shortpay Req More Info Message	Inform Preparer of Policy Non-Compliance for Missing Receipts

Delete MarkView systems attributes

1. Expand the Attributes section in Navigator.
2. Select the **Document Link attribute** and click **Delete**.
3. Select the **Bar Code** attribute, and click **Delete**.

A confirmation window opens.

4. Click **OK** to confirm the deletion.
5. Click **Save**.

> Warnings, such as issues with out-of-the-box Oracle workflows, may appear during the save process. Although this is normal, review the warnings to ensure that they are not a result of the changes you just made. If the Systems Receipts Reminder Message was ever sent, then it could not be deleted, but generated an error. Ignore the error and resave the workflow. The second time save without incident.

Remove Integration Points from the OIE regions

1. Log in to Apps as SYSADMIN.
2. Switch to the **Functional Administrator** responsibility.
3. Click the **Personalization** tab.
4. Select **Import/Export**.
5. Expand **oracle > apps > ap > oie > audit > webui > customizations > site > 0** and select:
   - **OIE_AUD_AUDIT_PAGE**
   - **OIE_AUD_SEARCH_PAGE**
6. Expand **oracle > apps > ap > oie > history > webui > customizations > site > 0** and select **ExpenseReportsPG**.
7. Expand **oracle > apps > ap > oie > webui > customizations > site > 0** and select the following:
   - **HomePG**
   - **OIEMAINPAGE**
   - **TrackReportsTblRN**
8. Click **Delete.**
9. Click the **Yes** to confirm the deletion.

Remove MarkView customizations from the APPS.AP_WEB_OA_CUSTOM_PKG package

Customizations in the AP_WEB_OA_CUSTOM_PKG package add the bar code on the Expense Submission page. To remove these customizations, revert to the standard Oracle supplied version of the AP_WEB_OA_CUSTOM_PKG package.

If you do not have the standard Oracle supplied version of the AP_WEB_OA_CUSTOM_PKG package, you can manually make the following changes to your current version of the package.

1. Open the AP_WEB_OA_CUSTOM_PKG package for editing.
2. Find the following lines:

```
l_msgtxt := ' ' ||
  MVOAIN_Expense_Report.OIECustomHeader(P_ReportHeaderId,P_CurrentPage);
--l_msgtxt := NULL;
```

3. Comment out the first line and uncomment the second one:

```
--l_msgtxt := ' ' ||
  MVOAIN_Expense_Report.OIECustomHeader(P_ReportHeaderId,P_CurrentPage);
```

```
l_msgtxt := NULL;
```

4. Find the following line:

```
Return '<B>Warning: </B>Call to MVOAIN_Expense_Report not successful<BR>' ||
' page = ' || P_CurrentPage ||
'<B>Error: </B>' || SUBSTR(SQLERRM, 1, 200);
```

5. Replace the line with the following:

```
Return '<B>Warning: </B>Call to AP_WEB_OA_CUSTOM_PKG.GetCustomizedExpRepSummary
not successful<BR>' || ' page = ' ||
P_CurrentPage ||
'<B>Error: </B>' || SUBSTR(SQLERRM, 1, 200);
```

6. Compile the new version of the package.

Remove the OIE triggers from the MarkView schema

1. Log in to the MarkView database as the MarkView database user.
2. Execute the following SQL statements:

```
drop trigger MVOA_OIE_EXPRPT_DLT
drop trigger MVOA_OIE_INV_INS_TR
drop trigger MVOA_OIE_WORKFLOW_FLAG_UPD
```

Appendix D

Third-party license agreement

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