



***Classification Manager***  
***Quick Start Guide***  
**Platform Services Version**

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**Kelley Connect, Inc.**

***Classification Manager***  
**Program Created by Chris Gritton**  
**Quick Start Guide Created January 24, 2021**

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## ***Classification Manager Quick Start Guide***

### **Preface**

This manual describes basic information to use the Classification Manager Module.

### **What is Classification Manager?**

This suite of software products enhances the functionality of the DocuWare Integrated Document Management system. Classification Manager allows scanned documents to be classified automatically. The Classification Manager identifies document phrases within each document and based on a phrase match, a document type will be assigned.

Typical applications include medical records, loan applications, human resources, and student transcripts.

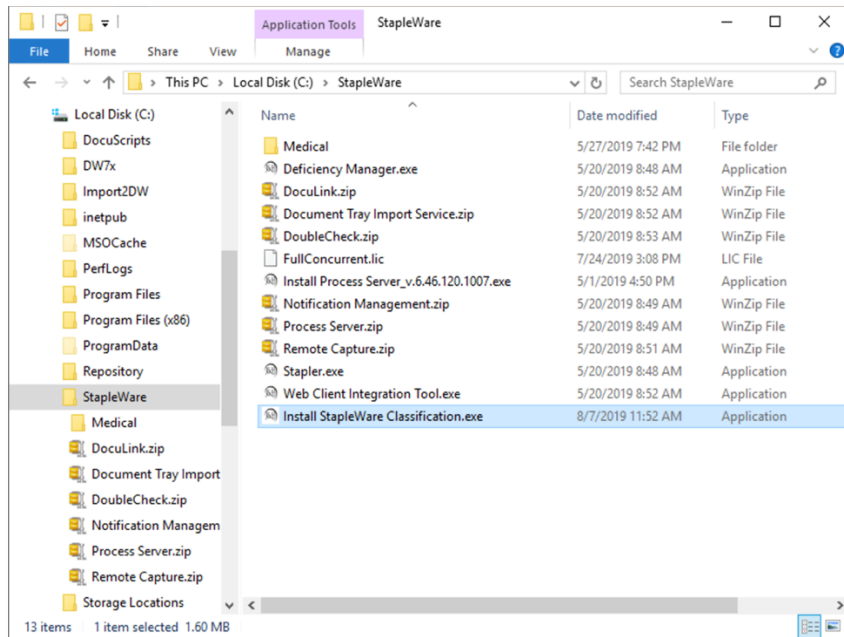
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### **Licensing**

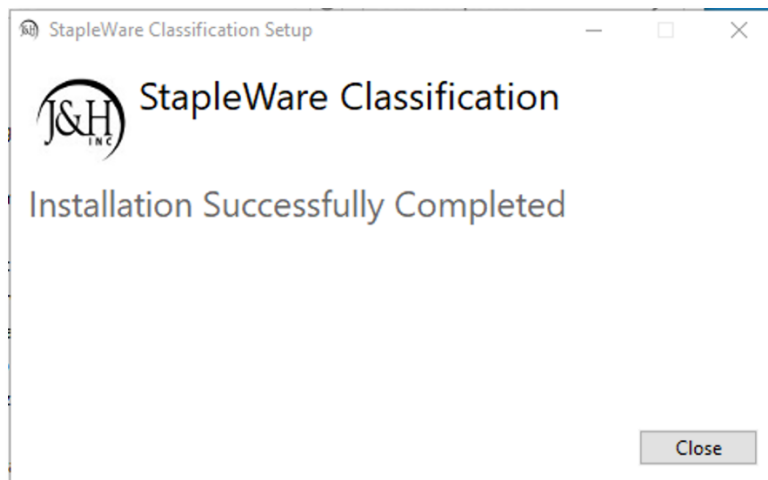
The user must have a valid license file for the module that is being installed. This license should be placed in a **License** folder that has been created in the DocuWare directory or under the C:\ root drive on the local machine. If you receive a license file with a .zip extension, place the .zip in the license folder and double click to extract the license file.

### **Installing Classification Manager**

Download the Classification Manager from the StapleWare website at [www.stapleware.com](http://www.stapleware.com). Open the **Classification Manager Installer.zip** setup utility. Double-click the **Classification Manager.msi** and run the program from its current location. The install wizard will lead you through the setup process.



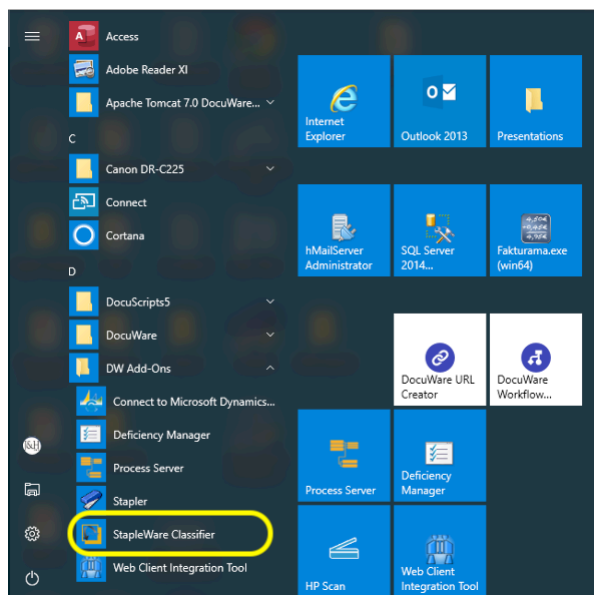
**Note:** If you're currently using this software and this installation is an upgrade - Please close the program, exit the services (*if applicable*), and uninstall the program before running the upgrade. You must read and agree to the license terms and conditions and then click **Next** to proceed...



Click **Close** to exit the installation process.

## Starting Classification Manager

Classification Manager may be started from the **Start Menu**. It is located under: Start/All Programs/DW Add-Ons/Classification Manager/Classification Manager.



## DocuWare Configuration

Before you begin, it is helpful to have a File cabinet that is specifically designed to identify documents. It can be the production file cabinet, or it can be a workflow file cabinet where documents are classified and later exported to the production file cabinet. Either way, the file cabinet **MUST** contain a MEMO field. Ideally it should be named "FT Memo". It will contain the result of the text extraction operation that occurs during the import. Create a specific Result List designed for the Search Tab. The Classification Result List should contain the Document Type, Last Name and Full Text Memo field.

### Configure the Result List

MR-Class-Result

Result

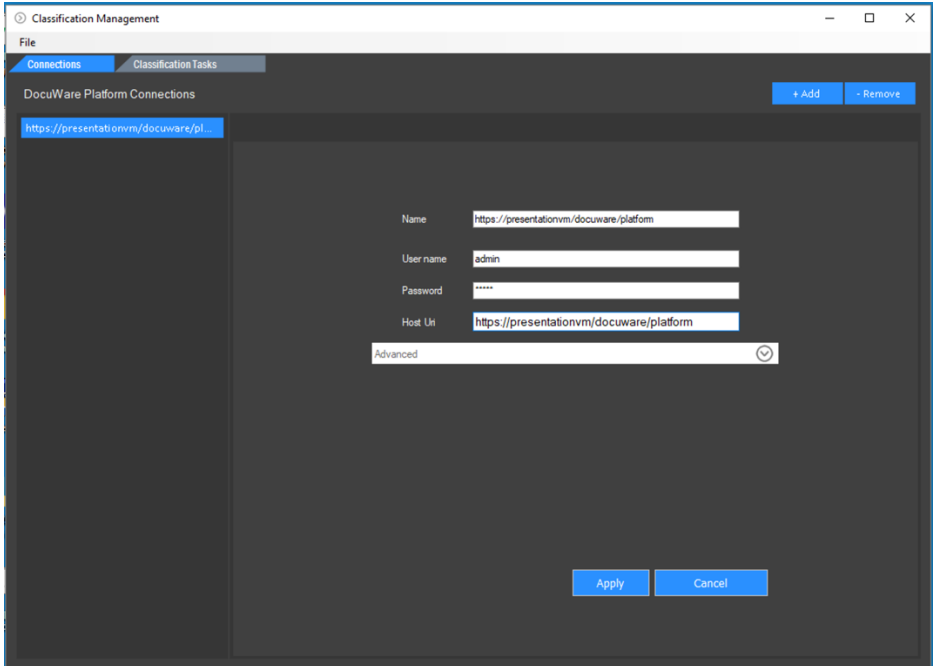
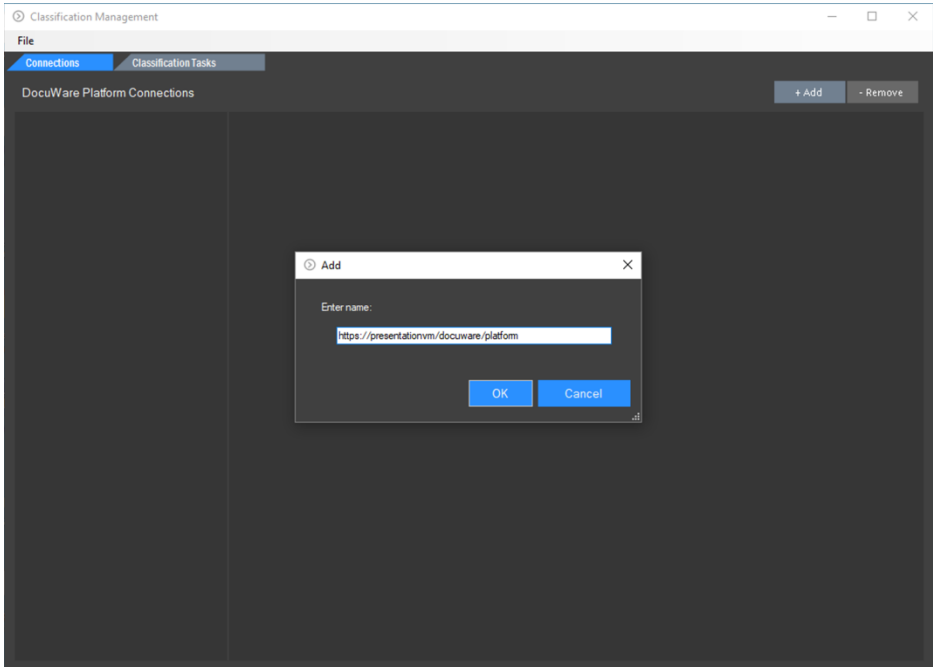
Index dialog

Edit the fields of the dialog

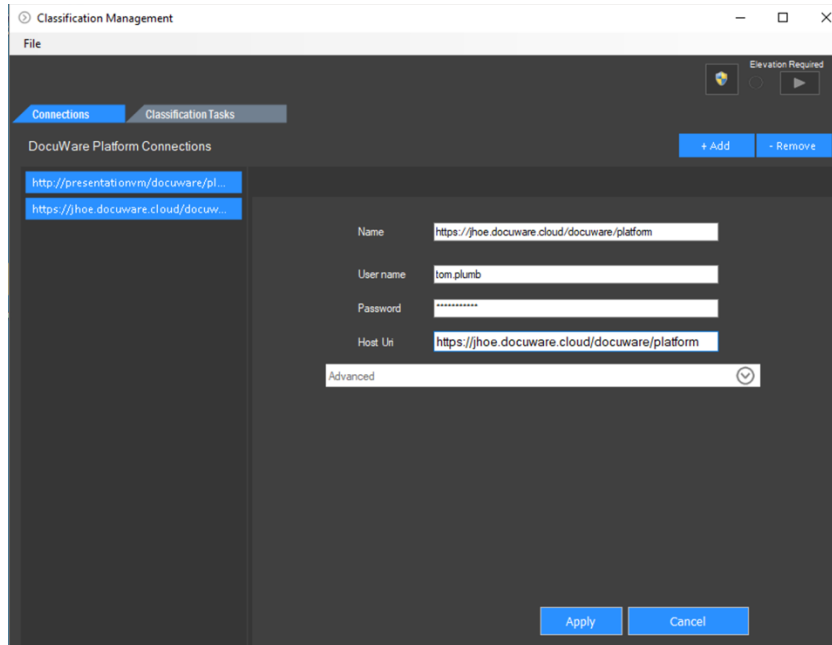
| Field Name    | Field Name in the Dialog | Type |   |
|---------------|--------------------------|------|---|
| Document Type | <i>Change label</i>      | Text | 👁 |
| Doc Status    | <i>Change label</i>      | Text | 👁 |
| Last Name     | <i>Change label</i>      | Text | 👁 |
| StapleStatus  | <i>Change label</i>      | Text | 👁 |
| FT_Memo       | <i>Change label</i>      | Memo | 👁 |

**Server Connection**

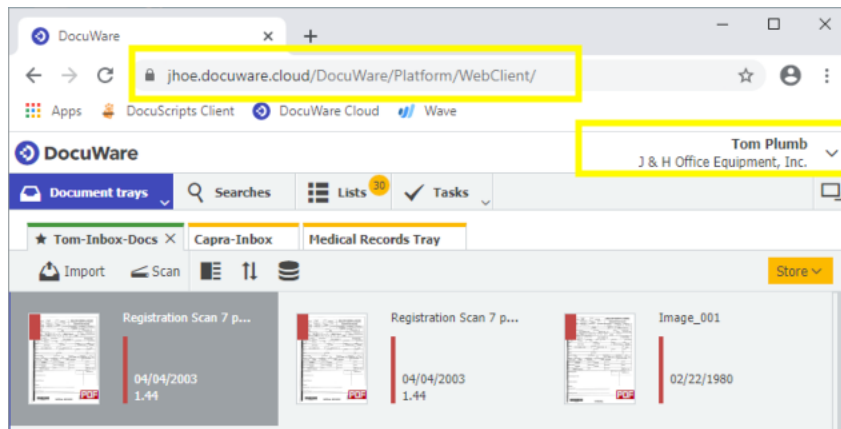
When Classification Manager opens, the user will be asked to create a connection to the server. After filling in these fields with the correct server URI, the user will be able to configure the Classification Manager.



To access DocuWare Cloud file cabinets use the following address and substitute the name of the cloud account.



You can see the URL and the Organization Name from the Cloud client.

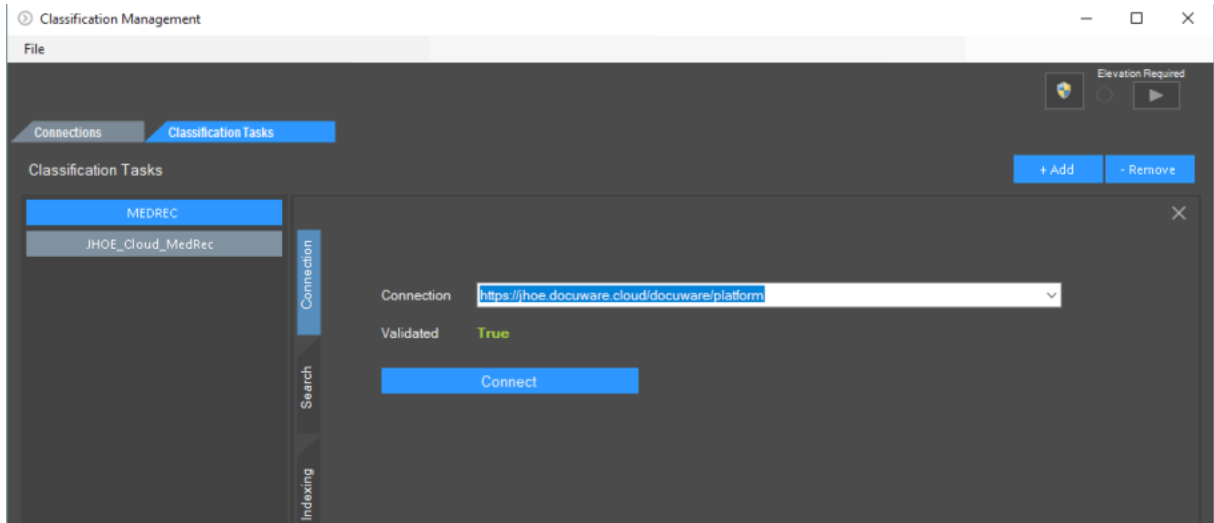


StapleWare Classification can be run as a service. This allows Classification to run without a DocuWare named license.

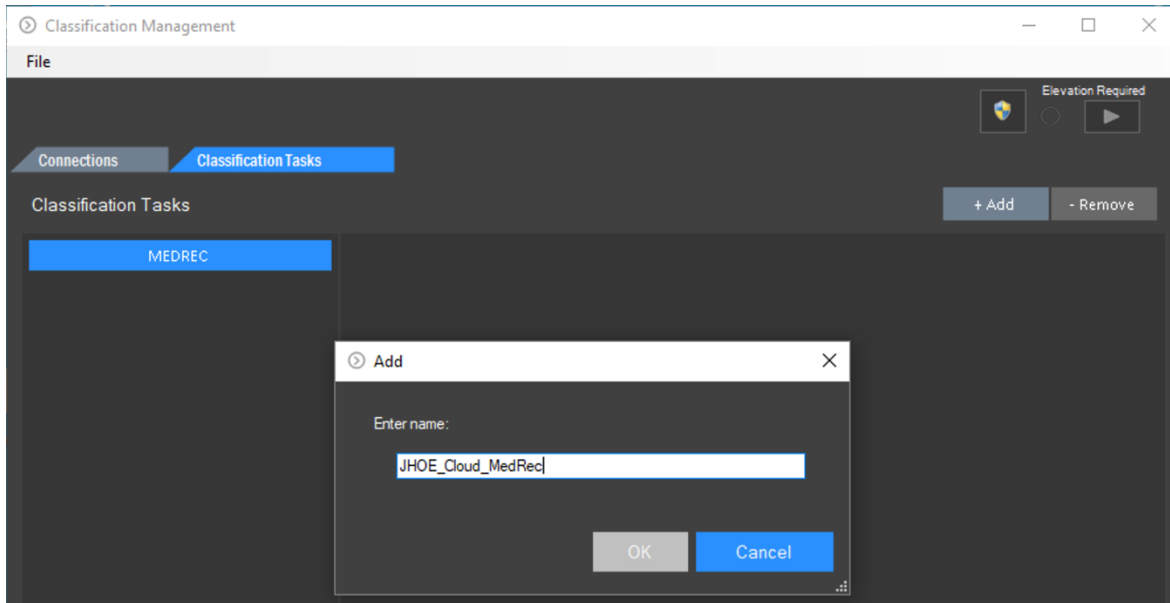


## Configuration Tab

The “CLASSIFICATION” tab AT THE TOP OF THE WINDOW, will allow multiple configurations in the StapleWare Classification Manager. From here, the user may create, edit or manage configuration tabs. Select the “CONNECTION” TAB to select a server connection. This is the server URI that contains the file cabinets where the documents reside that must be classified.



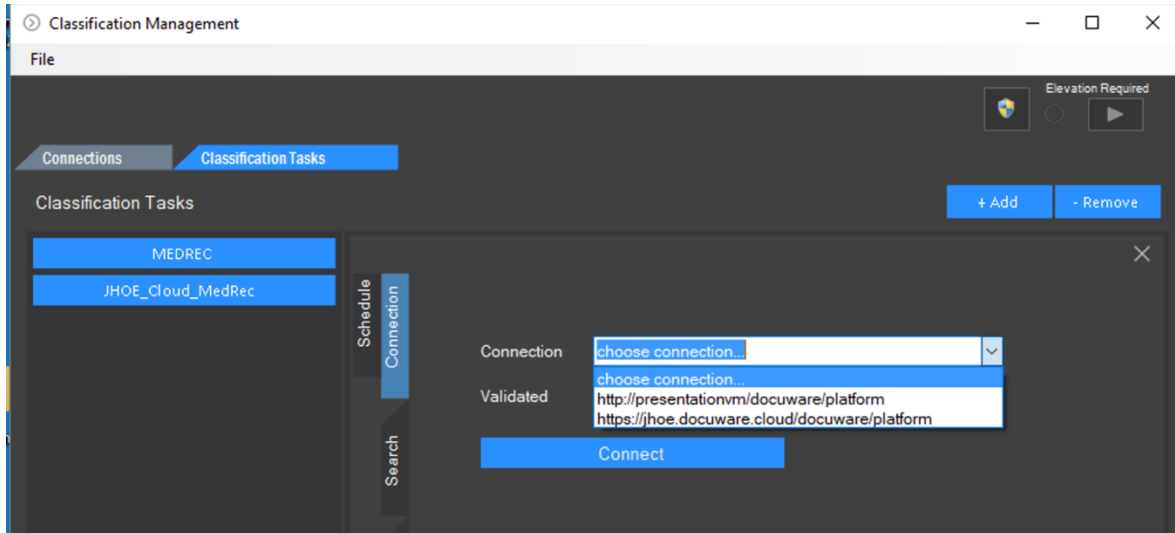
When creating a Cloud account be sure to type in the new configuration name:



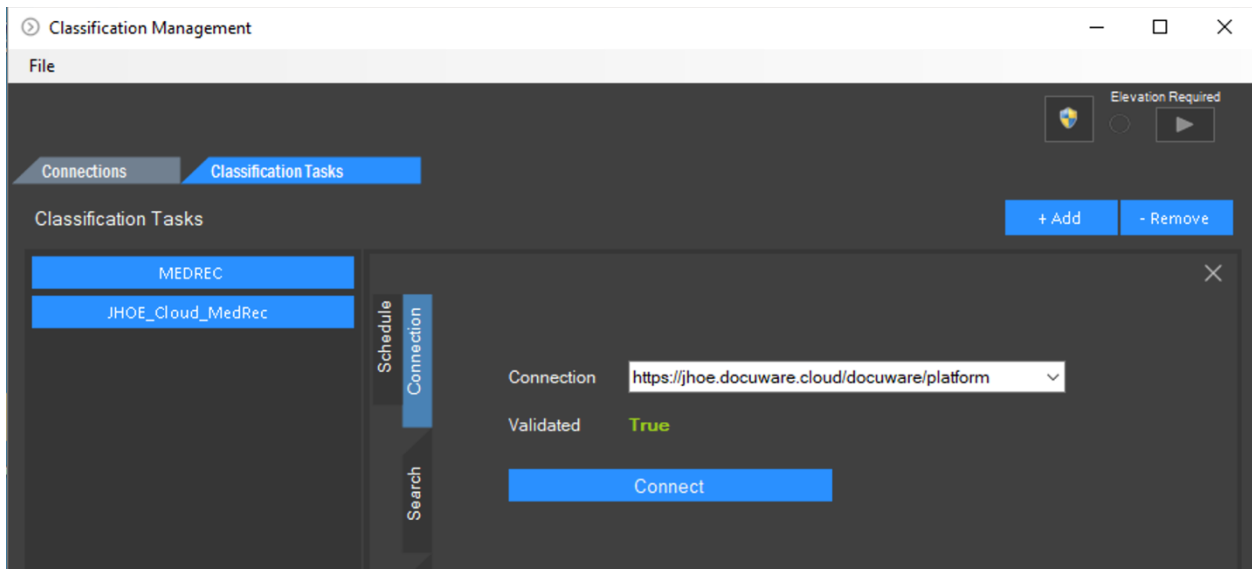
Click “Connect”



Select the Classification Tab and create a new Classification Task. The first step is to select the correct server to connect to.

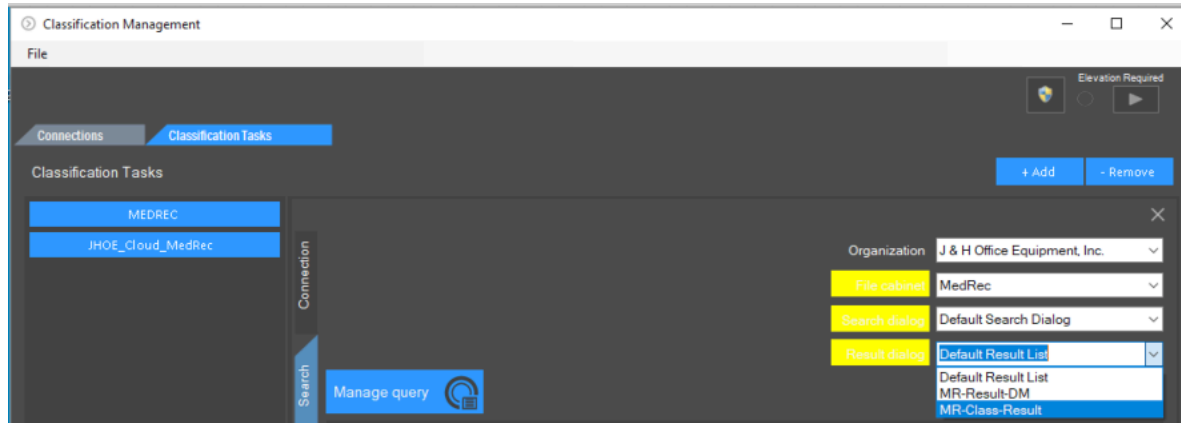


Once a positive connection has been established with the server click on the “SEARCH” tab. The Organization should be automatically selected. If it is different than the Organization that has been automatically selected use the drop down to select the correct Organization and select “Connect”. The Value for “Validated” should show as “TRUE”.

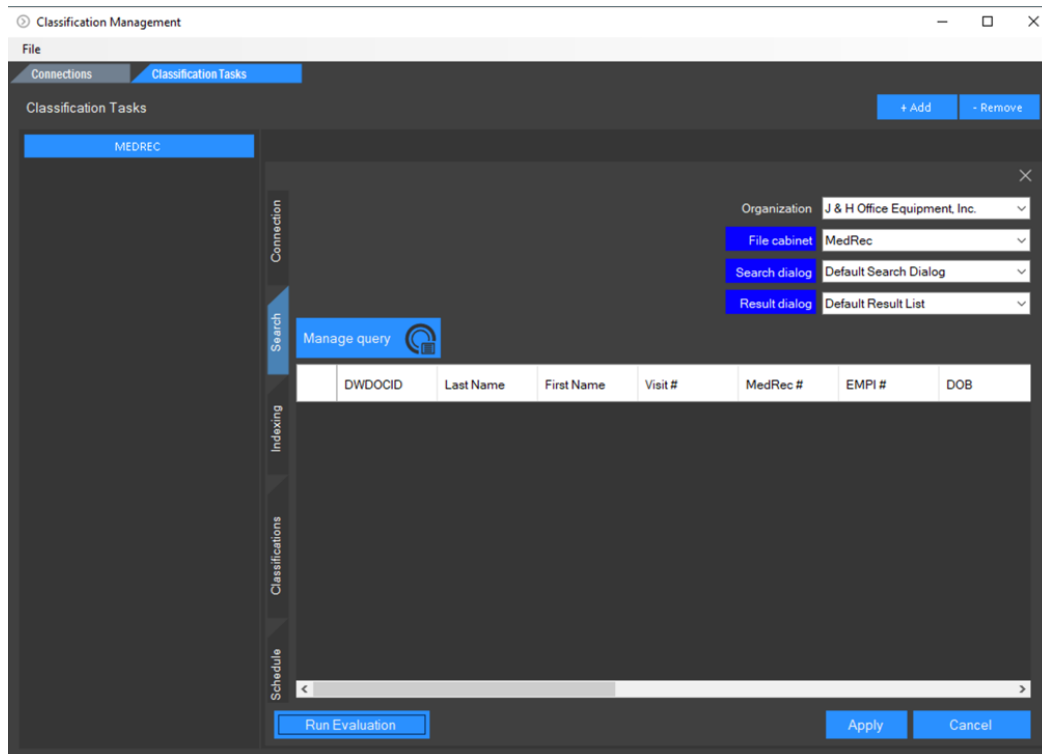


### Search Tab

The Search Tab allows the administrator to select the Organization if there are multiple organizations, the File cabinet to operate on, the correct Search Dialog and Result Dialog.



Click Apply and use the “Manage Query” button to DISPLAY and FILTER the results in the selected file cabinet. **This MUST be done before moving to the Classifications Tab.** For example, if the Classification needs to be run for all documents that have a STATUS of “InProgress”, then this configuration will be filtered by that criteria. This is the filter that will run on the documents in the file cabinet when the service runs. Click Search in the dialog to see the result of the filter. Click “Run Evaluation” to test the effect of the filter.



Organization: J & H Office Equipment, Inc.

File cabinet: MedRec

Search dialog: Default Search Dialog

Result dialog: Default Result List

Search Dialog

And Or

Last Name

First Name

Visit #

MedRec #

EMPI #

DOB

Document Type

Section

Date

Facility

Email

Status

Patent Status

Apply Search Cancel

Classification Management

File

Elevation Required

Connections Classification Tasks

Classification Tasks + Add - Remove

MEDREC

JHOE\_Cloud\_MedRec

Organization: J & H Office Equipment, Inc.

File cabinet: MedRec

Search dialog: Default Search Dialog

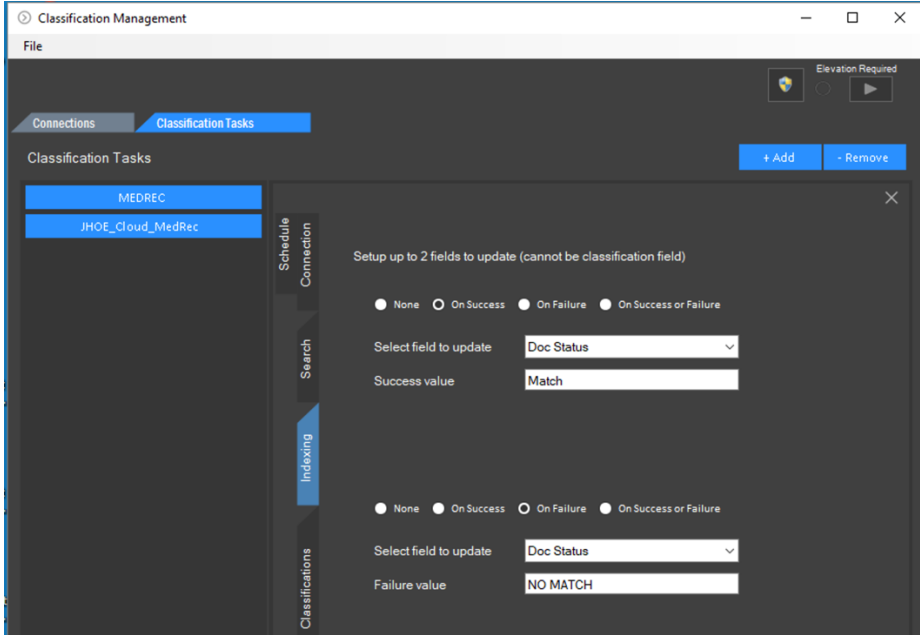
Result dialog: Default Result List

| DWDOCID | Last Name | First Name | Visit #    | MedRec # | EMPI # | DOB      |
|---------|-----------|------------|------------|----------|--------|----------|
| 71      | smith     | james      | 1700044567 | 75688    |        |          |
| 68      | maddock   | courtland  | 1700034565 | 4875982  |        |          |
| 65      | andripov  | pikup      | 1700012345 | 2233445  |        |          |
| 60      | cruz      | ji         | 1700045678 | 7456654  |        |          |
| 57      | smith     | james      | 1700044567 | 75688    |        |          |
| 54      | mccarthy  | John       | 1700023456 | 3344556  |        |          |
| 47      | Murphy    | Gavin      | 03342678   | 12345678 |        |          |
| 43      | andripov  | pikup      | 1700012345 | 2233445  |        | 4/3/2003 |
| 42      | maddock   | courtland  | 1700034565 | 4875982  |        | 4/3/2003 |
| 40      | smith     | james      | 1700044567 | 75688    |        | 4/3/2003 |
| 39      | Mccarthy  | John       | 1700023456 | 3344556  |        | 4/3/2003 |
| 33      | andripov  | pikup      | 1700012345 | 2233445  |        | 4/3/2003 |
| 32      | andripov  | pikup      | 1700012345 | 2233445  |        | 4/3/2003 |

Run Test Evaluations Apply Cancel

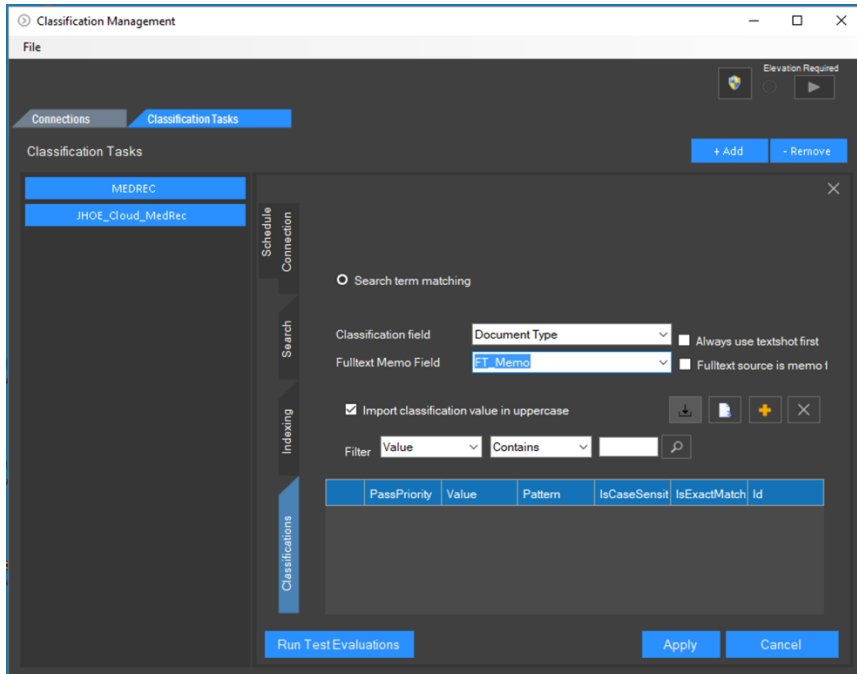
**Indexing Tab**

The Indexing Tab allows the administrator to set the index fields that will be updated through the classification process.

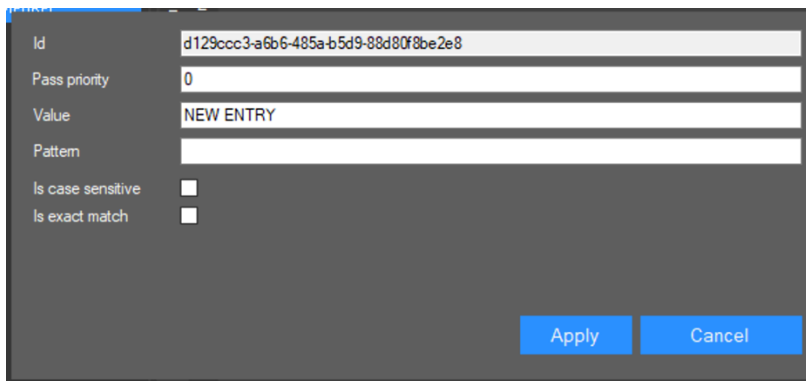


## Classification Tab

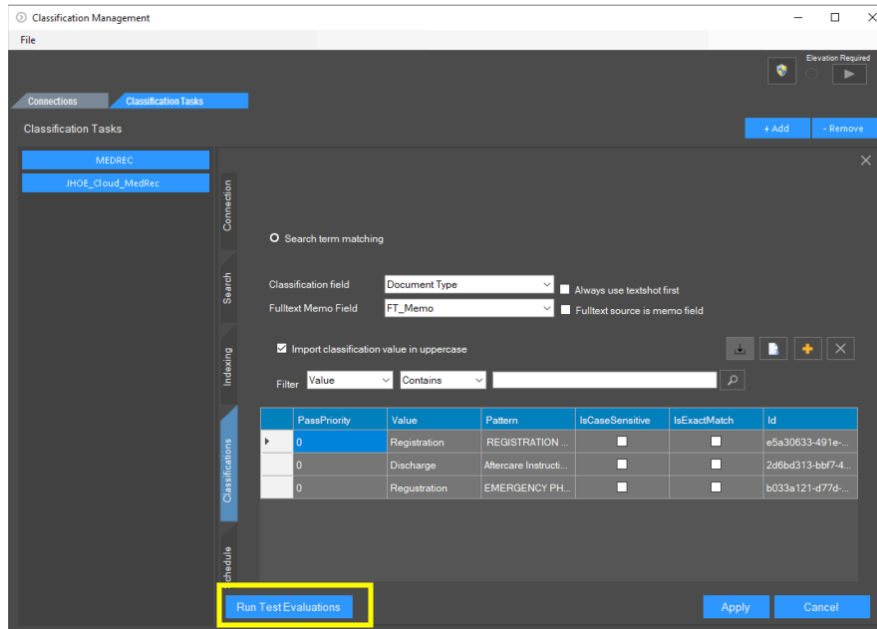
Select the “CLASSIFICATIONS” tab on the left to identify the Document Type field that will be updated when a classification is successful. Also identify the Full Text Field. In this way two recognition engines will be used to identify the phrases.



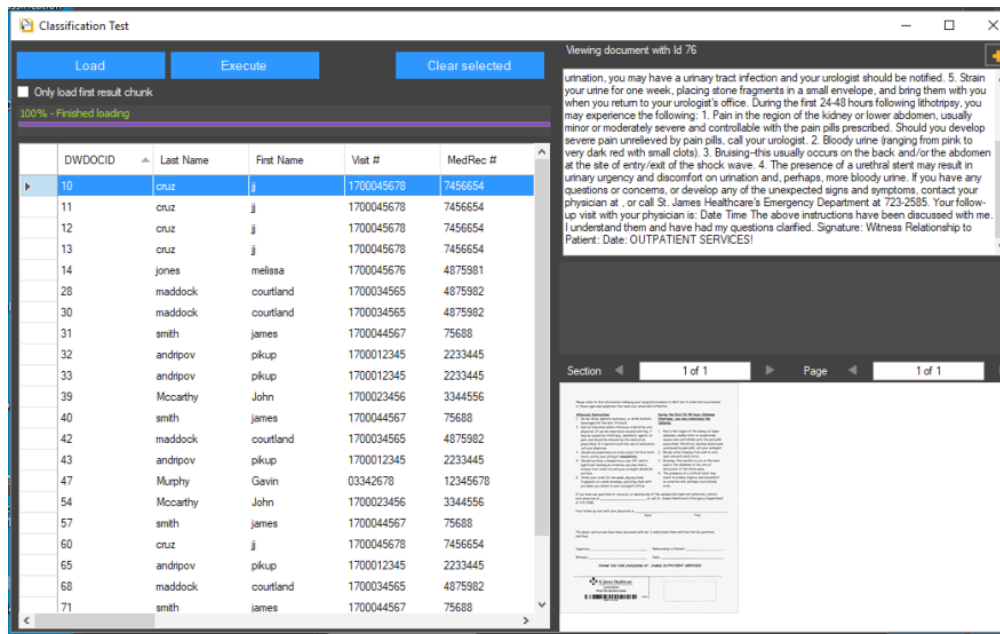
If you have a DocuWare Result List for the Medical Records File Cabinet available, then you can look in the Full Text Memo Field for the possible search phrases. You can click the **Yellow PLUS** sign to add Values (Document Types) and Patterns (Phrases) that determine the document type. A dialog box will appear that will allow you to enter the search phrases and the classification.



If you Select the “Run Test Evaluations” button on the bottom left. This will load the list of documents in the file cabinet based on the filter that was set under Search tab.



Build the search words and the associated document type classification by **double clicking** a text field in the row. The Classification Test Window will open showing the list of documents that need to be classified, the text of the FT\_Memo Field and an image of the document.



Use the COPY function (CTRL C) to copy and paste a phrase from the full text to the dialog. The VALUE is the document type and the pattern is the wildcard or phrase (medical\*daily flow sheet\*). Click the yellow plus sign in the upper right to get the classification dialog. Click EXECUTE to show you which classifications are working. You can run EXECUTE after each time you add a new classification. Here is the dialog box will appear that will allow you to enter the search phrases and the classification.

Create a search string and an associated classification for each page in the document. When you are finished with the list, click the X in the upper right of the window. When you create the phrases and document type classifications you can run the “Execute” button to see if the matches are correct in the MATCHED column. **This does not affect the DocuWare file cabinet database.**

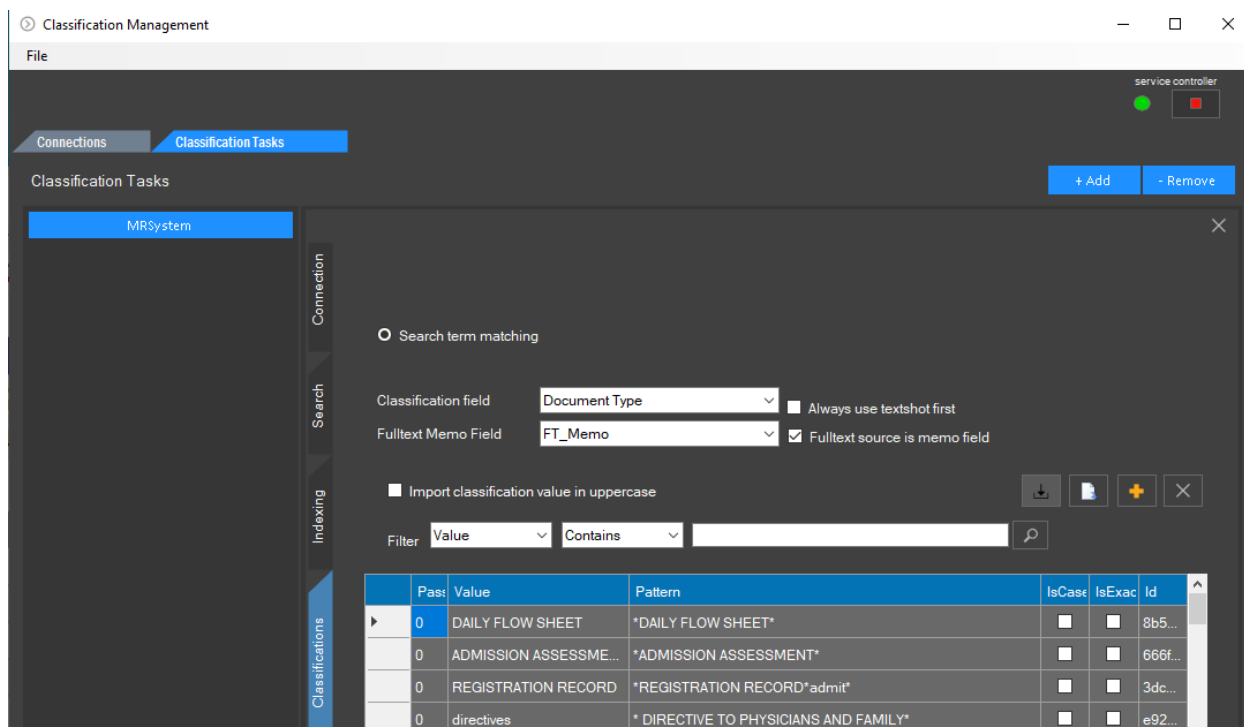
|  | PassPriority | Value           | Pattern              | IsCaseSensitive          | IsExactMatch             | Id                      |
|--|--------------|-----------------|----------------------|--------------------------|--------------------------|-------------------------|
|  | 0            | CARDIAC REHAB   | CARDIAC*REHABILIT... | <input type="checkbox"/> | <input type="checkbox"/> | 592cc37e-9910-4b14...   |
|  | 5            | CARDIAC REHAB   | HOME EXERCISE LO...  | <input type="checkbox"/> | <input type="checkbox"/> | 4af8fb3d-dc98-477f-a... |
|  | 0            | CARDIAC REHAB   | SESSION*REPORT*...   | <input type="checkbox"/> | <input type="checkbox"/> | 842cf6ab-0ffd-4d73-b... |
|  | 0            | PULMONARY REHAB | CARDIOPULMONAR...    | <input type="checkbox"/> | <input type="checkbox"/> | b04ac474-e490-4d77...   |

You will set the PassPriority value to establish which phrase will be evaluated first. If a match is found the Document Type value will be set and the search will move to the next page. After the values have been set Direct edit in grid

|  | PassPriority | Value           | Pattern              | IsCaseSensitive          | IsExactMatch             | Id                      |
|--|--------------|-----------------|----------------------|--------------------------|--------------------------|-------------------------|
|  | 0            | CARDIAC REHAB   | CARDIAC*REHABILIT... | <input type="checkbox"/> | <input type="checkbox"/> | 592cc37e-9910-4b14...   |
|  | 5            | CARDIAC REHAB   | HOME EXERCISE LO...  | <input type="checkbox"/> | <input type="checkbox"/> | 4af8fb3d-dc98-477f-a... |
|  | 0            | CARDIAC REHAB   | SESSION*REPORT*...   | <input type="checkbox"/> | <input type="checkbox"/> | 842cf6ab-0ffd-4d73-b... |
|  | 0            | PULMONARY REHAB | CARDIOPULMONAR...    | <input type="checkbox"/> | <input type="checkbox"/> | b04ac474-e490-4d77...   |

When you are finished with the classification for each page in the document click “APPLY”. Then Click SAVE and then Restart the Services.

To edit the Values or Patterns from the Classification Tab use the Filter to reduce the number of lines in the list. Rearrange or expand the columns so that you can clearly see the current Values and Patterns. By clicking in any cell under the Value Column or the Pattern Column you can add or delete text to meet your needs. When you are finished editing click APPLY and then under the File menu item select SAVE. You must stop and start the services for the new patterns to take effect.



When the classification is complete use the Export Icon to save the list in a separate file. In that way you would be able to import the list to another computer or if you need to reload for any reason.



**Scheduling Tab**

Select the "SCHEDULING" tab to set a date and time to run the Classification Manager.

