

# KOFAX Capture

## Batch Class Setup Quick Reference

### 6 SET UP BATCH CLASSES: Click the "Batch" tab. Select File | New | Batch Class.

SETUP OPTIONS	DESCRIPTION
Name	Name of batch class
Priority	Default priority of the batch class (1 is highest, 10 is lowest)
Image folder	Temporary image storage folder for in-process batches
Batch fields	Batch-level data fields for the batch class. Options are similar to index fields.
Queues	Specifies which modules the batch will go through: <ul style="list-style-type: none"> <li>• Scan Create batches, scan/import documents, edit batch contents</li> <li>• Recognition Server Separate documents, identify forms, auto recognition</li> <li>• Quality Control Rescan, validate form identification, edit batch contents</li> <li>• Validation Validate auto-recognized data, manual data entry</li> <li>• Verification Blind data entry, independent verification</li> <li>• OCR Full Text Full text OCR for each document and output in specified format</li> <li>• PDF Generator PDF generation for each document in batch</li> <li>• Release Release image files and data to back-end storage</li> </ul>
Workflow agent	Custom application to further control the routing of batches
Separation and form ID	Options for document separation (via patch codes, bar codes, or page recognition) and form ID (manual, separator sheets, or page recognition)
Folding	Defines the automatic folder creation rules.
Advanced	Advanced options, such as partial batch release, sort options, etc.
Document classes	Right-click the batch class and select "Insert Document Class."
Folder classes	Right-click the batch class and select "Insert Folder Class."

### 7 SET UP RELEASE SCRIPTS: Right-click a document class on the "Batch" tab and select "Release Scripts."

SETUP OPTIONS	DESCRIPTION
Release options	Select a script from the available scripts and click Add. Options vary from script to script, but typically include image storage location, index field storage, and image type.

### 8 PUBLISH THE BATCH CLASS: Select File | Publish on the menu bar. Select the batch class and click "Publish."

# KOFAX Capture

## Batch Class Setup Quick Reference

### 1 SET UP FIELD TYPES: Click the "Field Types" tab. Select File | New | Field Type.

SETUP OPTIONS	DESCRIPTION
Name	Name of field types
Data type	Type of field data (such as string, numeric, or date/time)
Dictionary	Dictionary name (optional)
Values	Known values displayed in drop-down list in Validation module (optional)

### 2 SET UP FOLDER CLASSES: Click the "Folder" tab. Select File | New | Folder Class.

SETUP OPTIONS	DESCRIPTION
Name	Name of folder class
Index fields	Data fields used for the folder class. Attributes include: <ul style="list-style-type: none"> <li>• Name Name of the index field</li> <li>• Display Label Field name displayed to the scan or validation operator</li> <li>• Field Type Field type associated with the field</li> <li>• Default Default value displayed for the field (optional)</li> <li>• Required If True, folder not created until this field has a value</li> <li>• Verify If True, field must be verified at the Verification module</li> <li>• Hidden If True, field is hidden from validation operator</li> <li>• Sticky If True, the entered value is carried from folder to folder</li> </ul>
Validation Script	If desired, associate a validation script to the folder class. Right-click the folder class and select Folder Validation Script from the context menu.

# KOFAX Capture

## Batch Class Setup Quick Reference

### 3 SET UP DOCUMENT CLASSES: Click the "Document" tab. Select File | New | Document Class.

SETUP OPTIONS	DESCRIPTION
Name	Name of document class
Index fields	Data fields used for the document class. Attributes include: <ul style="list-style-type: none"> <li>• Name Name of the index or table field</li> <li>• Display Label Override for field name displayed to the validation operator Field name displayed to the scan or validation operator</li> <li>• Field Type Field type associated with the field</li> <li>• Default Default value displayed for the field (optional)</li> <li>• Required If True, field must be filled in at validation time</li> <li>• Verify If True, field must be verified at the Verification module</li> <li>• Hidden If True, field is hidden from validation operator</li> <li>• Sticky If True, the entered value is carried from document to document</li> <li>• Total If True, the field is used for batch totaling</li> </ul>
OCR	OCR full text options to be applied to each page in the document
PDF	Kofax PDF options to be applied to the document
Validation script	If desired, associate a validation script to the document class. Right-click the document class and select Document Validation Script from the context menu.
Database validation	If desired, enable database validation. Right-click the document class and select Database Validation from the context menu.

### 4 SET UP FORM TYPES: Right-click a document class on the "Document" tab and select "New Form Type."

SETUP OPTIONS	DESCRIPTION
Name	Name of form type
Fixed # of pages	Number of pages for the form (applicable if the form has a fixed number of pages)
Permanent image cleanup	Image cleanup settings to be applied permanently to the entire form
Page registration	Minimum confidence for a page to be considered correctly matched against its corresponding sample page. By default, it occurs for pages with index zones.
Automatic index field recognition	Threshold for distinguishing between a confident and non-confident field. Applies to all zones on the form for which data is auto-recognized, such as with OCR, ICR, etc.
Page level bar code	Bar code type if page-level bar code is used. Right-click on "Page Level Bar Codes" under the sample page to enable this option.

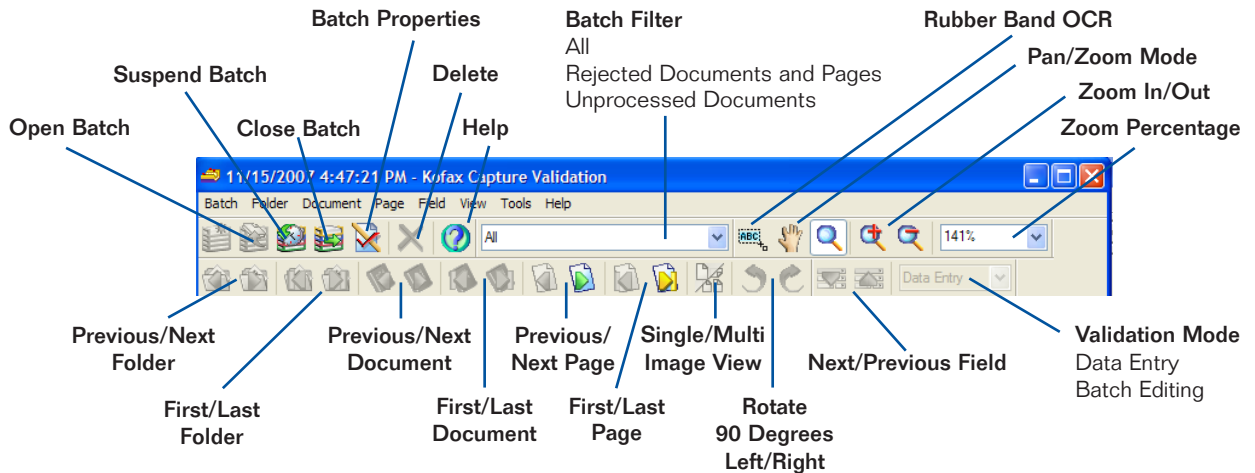
### 5 SET UP SAMPLE PAGES: Right-click a form type on the "Document" tab and select "Add Sample Pages."

SETUP OPTIONS	DESCRIPTION
Index zones	Click "Create Index Zone" button on toolbar and draw zones on the sample page. Specify the following as desired for each zone: <ul style="list-style-type: none"> <li>• Field The field associated with the zone</li> <li>• Auto recognition Specifies that auto recognition is to be used</li> <li>• Recognition profile Specifies auto recognition type (OCR, ICR, OMR, shape, or bar code), recognition options, and image cleanup (despeckle, etc.)</li> <li>• OMR options Overrides confidence threshold and specifies return values for OMR zones (optional)</li> </ul>
Registration zones	Click "Create Registration Zone" button on toolbar and draw zones on the sample page. <ul style="list-style-type: none"> <li>• Recognition profile Same as above</li> <li>• Search text Text string on which to register the page</li> </ul>
Shape registration zones	Click "Shape Registration Zone" button on toolbar and draw zones on the sample page. <ul style="list-style-type: none"> <li>• Recognition profile Same as above</li> <li>• Search shape Shape (corner, intersection, etc.) on which to register the page</li> </ul>
Separator zones	Click "Create Separator Zone" button on toolbar and draw zones on the sample page. Options are the same as registration zones, with one addition: <ul style="list-style-type: none"> <li>• Confidence Minimum confidence level for success</li> </ul>
Form ID zones	Click "Create Form Identification Zone" button on toolbar and draw zones on the sample page. Options are the same as separator zones.
Index group zones (for grouping index zones)	Click "Create Index Group Zone" button on toolbar and draw zone on the sample page. <ul style="list-style-type: none"> <li>• Validation display The entire group of zones or the most confident in the group is displayed to validation operators</li> <li>• Values in result The expected number of values to be returned</li> <li>• Result set Return delimited values or most confident</li> </ul>

# KOFAX Capture

# Validation Module Quick Reference

## TOOLBAR OPTIONS



## DATA ENTRY ACCELERATOR KEYS

KEY	DESCRIPTION
Tab	Move to the next field
Shift-Tab	Move to the previous field
Ctrl-Tab	Select the entire field
Enter	If "Enter key moves to next field" is selected (from the Tools/Options menu), the Enter key works the same as the Tab key
Shift-Enter	If "Enter key moves to next field" is selected, Shift-Enter works the same as Shift-Tab.
Shift-Del	Deletes entire selection. If nothing is selected, deletes one character to the left of the insertion point
Up/Down	Move up/down in a drop-down list
Left/Right	Move the cursor left or right

## BATCH EDITING ACCELERATOR KEYS

NUM KEY	DESCRIPTION
*	Expand everything under selection
+ or -	Expand / collapse selection
KEY	DESCRIPTION
-	Reject document or page (then press a number or type a rejection reason)
=	Unreject document or page
Enter	Move to next document or page
'	Change form type
/	Edit document properties
] or [	Rotate image right / left and save
C	Create a document
S	Split a document
D	Combine documents/pages



# KOFAX Capture

## Scan/Quality Control Module Quick Reference

**BATCH CREATION:** Select Batch | New from the menu bar.

SETUP OPTIONS	DESCRIPTION
Batch class	Batch class required for the current batch
Priority	Priority for batch (1 is highest, 10 is lowest)
Description	Description of the batch class, as entered in the Administration module
Name	Name for batch. By default, it is the current date and time.
Description	Description of the batch (optional)
Pages per document	Number of pages per document (if documents are fixed size)
Documents per batch	Size of the batch in documents (optional)
Pages per batch	Size of the batch in pages (optional)
Batch fields	Batch fields defined for the batch class
Totals	Batch total information (if batch totaling is enabled)
Endorser	Starting number for the scanner endorser (optional)

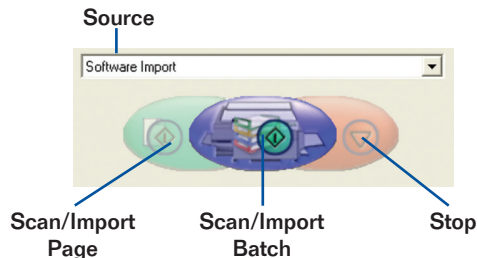
**BATCH OPTIONS:** When the batch is finished, select Batch from the menu bar, then one of these options:

OPTIONS	DESCRIPTION
Close	Close the batch and send it to the next queue
Suspend	Suspend the batch so that you can continue working on it later
Delete	Delete the batch and start over

### ACCELERATOR KEYS

NUM KEY	DESCRIPTION
*	Expand everything under selection
+ or -	Expand / collapse selection
KEY	DESCRIPTION
-	Reject document or page (then press a number or type a rejection reason)
=	Unreject document or page
Enter	Move to next document or page
'	Change form type
/	Edit document properties
] or [	Rotate image right / left and save
C	Create a document
S	Split a document
D	Combine documents/pages

### SCAN PANEL



# KOFAX Capture Network Server

# Remote Batch Manager Quick Reference

## Configuring RSA Polling Settings

RSA polling settings control how often and when the RSA synchronizes with your central site. These settings can be centrally or remotely controlled, as specified by the profile assigned to your remote site by the central site system administrator. If allowed by your remote site profile, you can specify RSA polling settings at your remote site.

Start Batch Manager at the remote site and select Options | KCN Server | RSA Polling Settings. The RSA Polling Settings dialog box will display.

**Polling Settings:** Select the desired polling frequency and the date/time to start polling.

**If Connection Fails:** Select the desired behavior for retrying to poll if the connection to the central site Web server fails.

**Batch Status Settings:** Select the desired frequency for checking the status of batches uploaded with the RSA.

## Converting to an KCN Server Remote Site

**Important:** Performing this conversion will cause the Administration module to become unavailable at the remote site and delete any batch classes created at the remote site. For remote sites, all batch class creation and management must occur at the central site.

Start Batch Manager at the remote site and select Options | KCN Server | Convert to Remote Site. When prompted, enter/select the desired information.

**Web Server URL:** Enter the URL of the central site KCN Server Web server. If necessary, you can switch Web servers at a later time by selecting Options | ACI Server | Web Server URL.

**Remote Synchronization Agent:** Choose to activate the Remote Synchronization Agent (RSA). This will allow your remote site to automatically synchronize with your central site for uploading completed batches/data and downloading new/edited batch classes and other settings. (Recommended)

## Configuring Batch Processing Dialog Polling Settings

You can upload a single batch by selecting a batch listed in Batch Manager as "Ready" for KCN Server and clicking the Process Batch button from the toolbar. This causes the selected batch to be uploaded to the central site and status returned per the polling settings specified with the Batch Processing Dialog Polling Settings dialog box.

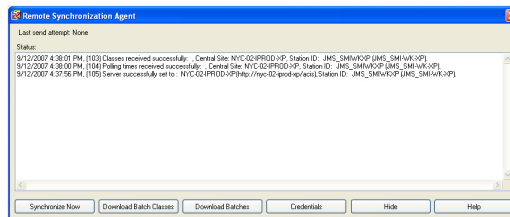
Start Batch Manager at the remote site and select Options | KCN Server | Batch Processing Dialog Polling Settings. The Batch Processing Dialog Polling Settings dialog box will display.

**Batch Status Settings:** Select the desired frequency for checking the status of a single batch uploaded from Batch Manager.

## Using the Remote Synchronization Agent

The Remote Synchronization Agent must be running on at least one workstation at the remote site for automatic synchronization to occur. When running, the Remote Synchronization Agent icon will display in the Windows system tray on the remote workstation.

Right-click the Remote Synchronization Agent system tray icon and select Status from the context menu. The Remote Synchronization Agent dialog box will display, allowing you to view synchronization event information or perform various actions.



**Status:** View synchronization events, including whether batch classes and other settings were received and completed batches and tracking data were sent.

**Synchronize Now:** Click to immediately synchronize with the central site. New/edited batch classes and settings will be downloaded to the remote site, and completed batches and tracking data will be uploaded to the central site.

**Download Batch Classes:** Click to download new/edited batch classes to the remote site. Completed batches and tracking data will not be uploaded to the central site.

**Download Batches:** Click to download batches from the central site.

**Credentials:** Click to enter and save remote site authentication information.

**Hide:** Click to close the dialog box.

**Help:** Click to display online help.



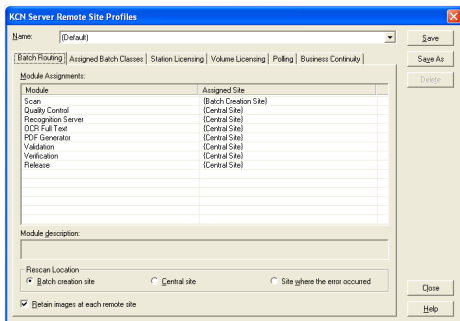
# KOFAX Capture Network Server

# Administration Module Quick Reference

## Setting Up Remote Site Profiles

A remote site profile is a named group of settings that define batch routing, access to batch classes, licensing, and polling behavior for remote sites.

Start the Administration module at the central site and select Edit | KCN Server Remote Site Profiles. The KCN Server Remote Site Profiles dialog box will display. Select/enter options from the various tabs.



**Name:** Select the remote site profile to use as a base for a new profile, or the name of the remote site profile to edit.

**Batch Routing tab:** Specify which Kofax Capture modules are to be run at the remote and central sites.

**Assigned Batch Classes tab:** Assign batch classes to be available to all remote sites that share the remote site profile.

**Station Licensing tab:** Assign station licenses (such as the Full Station License) to be allocated to all remote sites that share the remote site profile.

**Volume Licensing tab:** Define the volume licensing limits for a remote site profile.

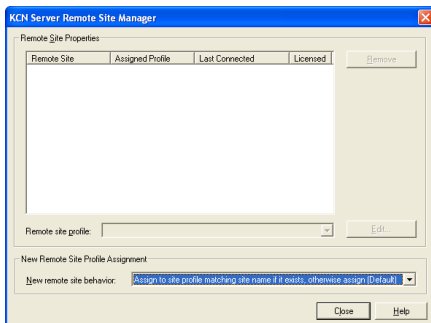
**Polling tab:** Specify whether you want polling to be controlled by the central site or allow remote sites to control polling. If you select central control for polling, specify the desired polling options from this tab.

**Business Continuity tab:** Specify batch upload behavior – automatically select a central site for load balancing or upload batches using a priority list of central sites.

## Assigning Remote Site Profiles to Remote Sites

You can assign a remote site profile to one or more remote sites. All remote sites that share a profile will use the settings defined in the profile.

Start the Administration module at the central site and select Tools | KCN Server | Remote Site Manager. The KCN Server Remote Site Manager dialog box will display. Select the desired assignments.



**New remote site behavior:** Select the default behavior for new remote sites. For example, if you select “By remote site name if it exists, otherwise (Default)” new remote sites will automatically be assigned a remote site profile with the same name as the remote site, if such a remote site profile exists.

**Remote Site:** This is a list of all remote sites. Select the remote site to which you want to assign a remote site profile. Note that remote sites are not listed until the first time they synchronize.

**Assigned Profile:** These are the remote site profiles currently assigned to the remote sites.

**Last Connected:** This displays the most recent time that a licensed remote site connected to its primary central site.

**Licensed:** This indicates whether or not the remote site is licensed to the current central site.

**Remove button:** Click to remove the selected remote site from the list.

**Remote site profile:** Choose the desired remote site profile to assign to the selected remote site. All defined remote site profiles are available from this list.

**Edit button:** Opens the Remote Site Profile dialog box, allowing you to view/modify remote site profile settings or create a new profile.