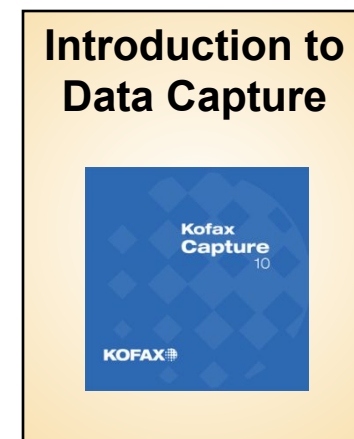


Module 6

Introduction to Data Capture

Introduction to Data Capture

- Fields and field types
- Adding processing queues
- Queue properties
- Fixed page separation
- Automatic batch naming
- Document class fields and properties
- Sample pages
- Setting up data or index zones
- Page level bar code setup
- Export connector setup for exporting data
- Validation module
- Validating captured data



Create a Field Type

The screenshot displays the Kofax Capture software interface with three callouts illustrating different methods to create a field type:

- Callout 1 (Top Right):** Shows the 'Field Type' icon in the 'Insert' panel of the 'Quick Access Tool Bar' highlighted with a red box. A tooltip below it reads 'Field Type' and 'Create a new field type'.
- Callout 2 (Bottom Left):** Shows the 'Field Type' icon in the 'Insert' panel of the 'Quick Access Tool Bar' highlighted with a red box. A tooltip below it reads 'Field Type' and 'Create a new field type'.
- Callout 3 (Middle Left):** Shows the 'Definitions' panel with the 'Field Types' tab selected. A 'New Field Type...' button is highlighted with a red box.

- Create a new field type in one of three ways:**
- 1) Click on the Field Type icon in the Quick Access Tool Bar**
 - 2) Right mouse click in the Definitions Panel | Field Types tab and select “New Field Type...”**
 - 3) Click on “Field Type” icon on the Insert panel**

Field Type Properties

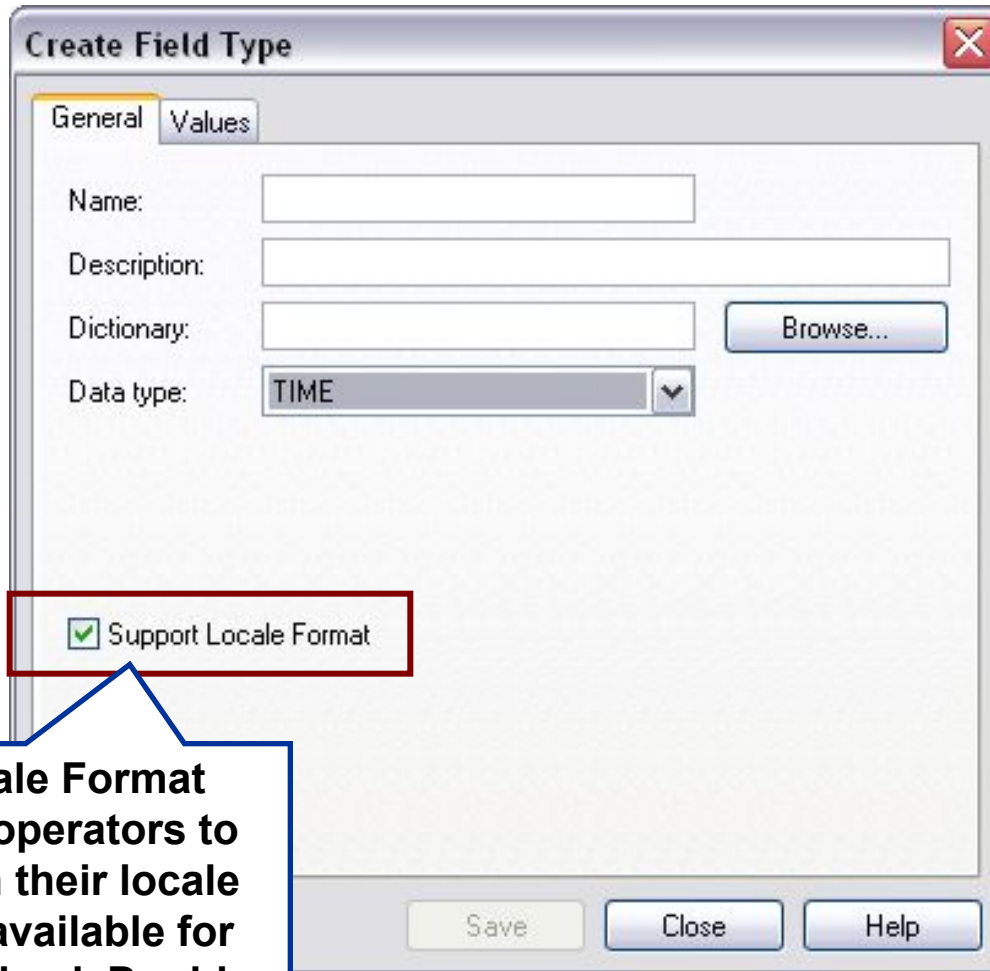
The screenshot shows the 'Create Field Type' dialog box with the following fields and options:

- Name:** Alphanumeric10
- Description:** (empty text box)
- Dictionary:** (empty text box with a 'Browse...' button)
- Data type:** VARCHAR
- Number of characters:** 10
- Subtype:** (None), Email Address, Fax Number
- Buttons:** Save, Close, Help

Callouts provide the following instructions:

- Choose one of the 11 SQL data types:** Points to the 'Data type' dropdown menu. A list of 11 SQL data types is shown in a separate box: CHAR, DATE, DECIMAL, DOUBLE, FLOAT, INTEGER, NUMERIC, REAL, SMALLINT, TIME, VARCHAR.
- Assign a Name:** Points to the 'Name' text box.
- Assign an optional Description:** Points to the 'Description' text box.
- Subtypes are available for Email and Fax:** Points to the 'Subtype' dropdown menu.
- Assign maximum number of characters:** Points to the 'Number of characters' spinner box.
- Click [Save] the field type settings are complete:** Points to the 'Save' button.

Field Type Properties – Support Local Format



The screenshot shows a 'Create Field Type' dialog box with two tabs: 'General' and 'Values'. The 'Values' tab is active. It contains the following fields and controls:

- Name: [Empty text box]
- Description: [Empty text box]
- Dictionary: [Empty text box] with a 'Browse...' button to its right.
- Data type: A dropdown menu currently showing 'TIME'.
- A checkbox labeled 'Support Locale Format' which is checked. This checkbox is highlighted with a red rectangular box.

At the bottom of the dialog, there are three buttons: 'Save', 'Close', and 'Help'.

Support Locale Format option allows operators to enter values in their locale format. Only available for Date, Time, Decimal, Double, Float, Real, Integer, SmallInt, and Numeric data types.

Field Types are Created and Available

The screenshot displays the Kofax software interface. At the top, there are tabs for 'Home', 'Insert', and 'View'. Below these, a ribbon contains several groups of icons. The 'Create New' group includes 'Batch Class', 'Document Class', 'Folder Class', 'Form Type', and 'Field Type'. The 'Zones' group includes 'Index', 'Registration', and 'Form'. A 'Scan Source' dropdown menu is set to 'Fujitsu fi-6130 with SVRS with'. Below this is a 'Definitions' window with tabs for 'Batch', 'Document', 'Folder', and 'Field Types'. The 'Field Types' tab is active, showing a list of field types: 'Alphanumeric10' and 'Alphanumeric20'. The 'Alphanumeric20' field type is highlighted with a dashed border. A callout box points to this field type with the text: 'This field type will allow from 0 – 20 characters or numbers'. Another callout box at the top right of the interface contains the text: 'Field types are created and available for batch class fields, document class index fields, and folder class fields'.

Field types are created and available for batch class fields, document class index fields, and folder class fields

Scan Source: Fujitsu fi-6130 with SVRS with

Definitions

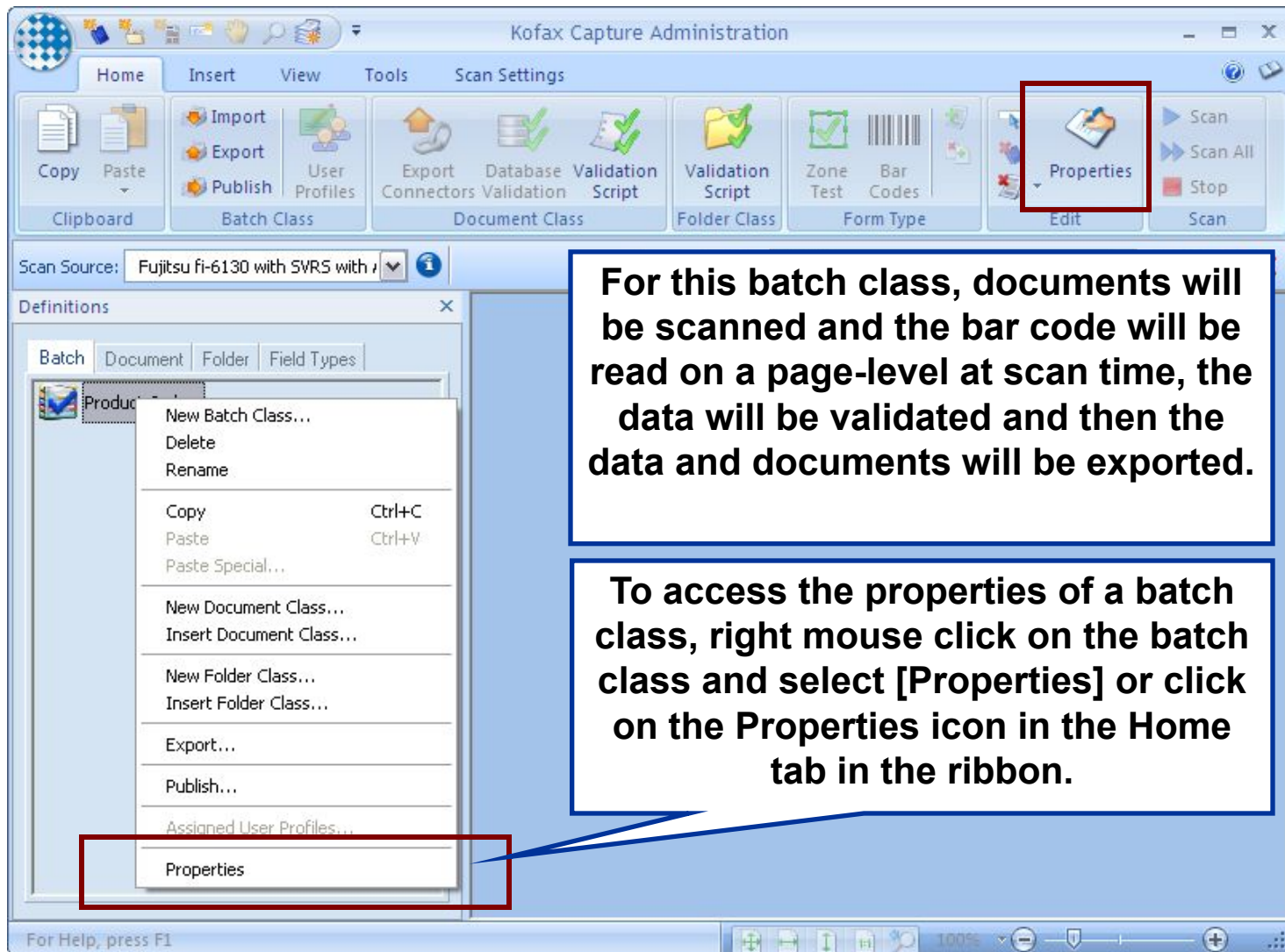
Batch Document Folder Field Types

Alphanumeric10

Alphanumeric20

This field type will allow from 0 – 20 characters or numbers

Accessing the Batch Class Properties



The screenshot displays the Kofax Capture Administration interface. The ribbon at the top includes tabs for Home, Insert, View, Tools, and Scan Settings. The 'Home' tab is active, showing various icons for document management. A red box highlights the 'Properties' icon in the 'Edit' group of the ribbon. Below the ribbon, the 'Definitions' pane is visible, showing a list of batch classes. A right-click context menu is open over the 'Product' batch class, with the 'Properties' option at the bottom highlighted by a red box. A blue callout box points from the 'Properties' option in the context menu to the 'Properties' icon in the ribbon.

For this batch class, documents will be scanned and the bar code will be read on a page-level at scan time, the data will be validated and then the data and documents will be exported.

To access the properties of a batch class, right mouse click on the batch class and select [Properties] or click on the Properties icon in the Home tab in the ribbon.

Adding the Validation Module

Highlight Validation and select [Properties] to set the properties

Validation properties include "Allow batch editing." If checked, the validation operator would be able to do things like rotate and save pages, reorder pages in the batch, etc.

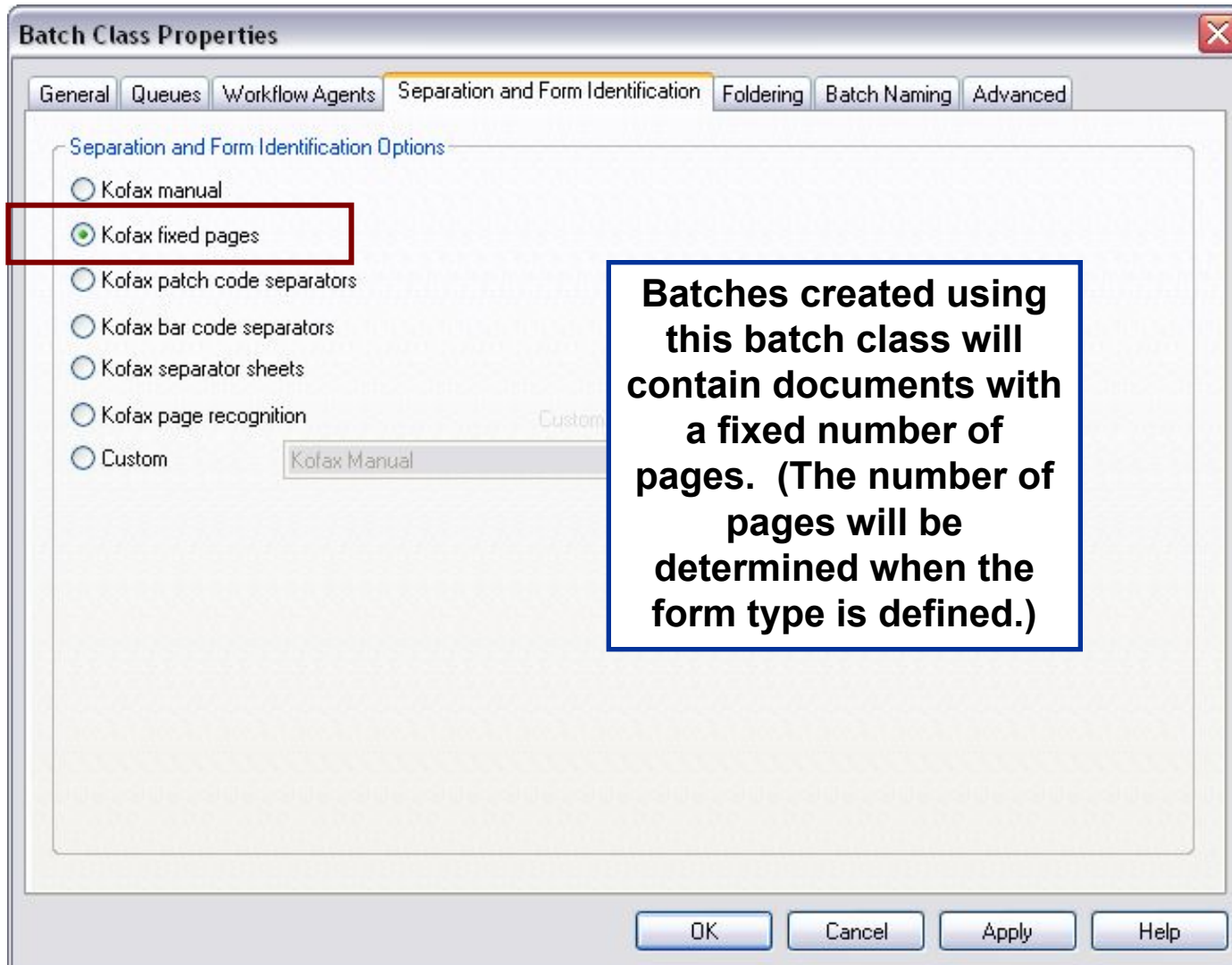
Validation Properties

General

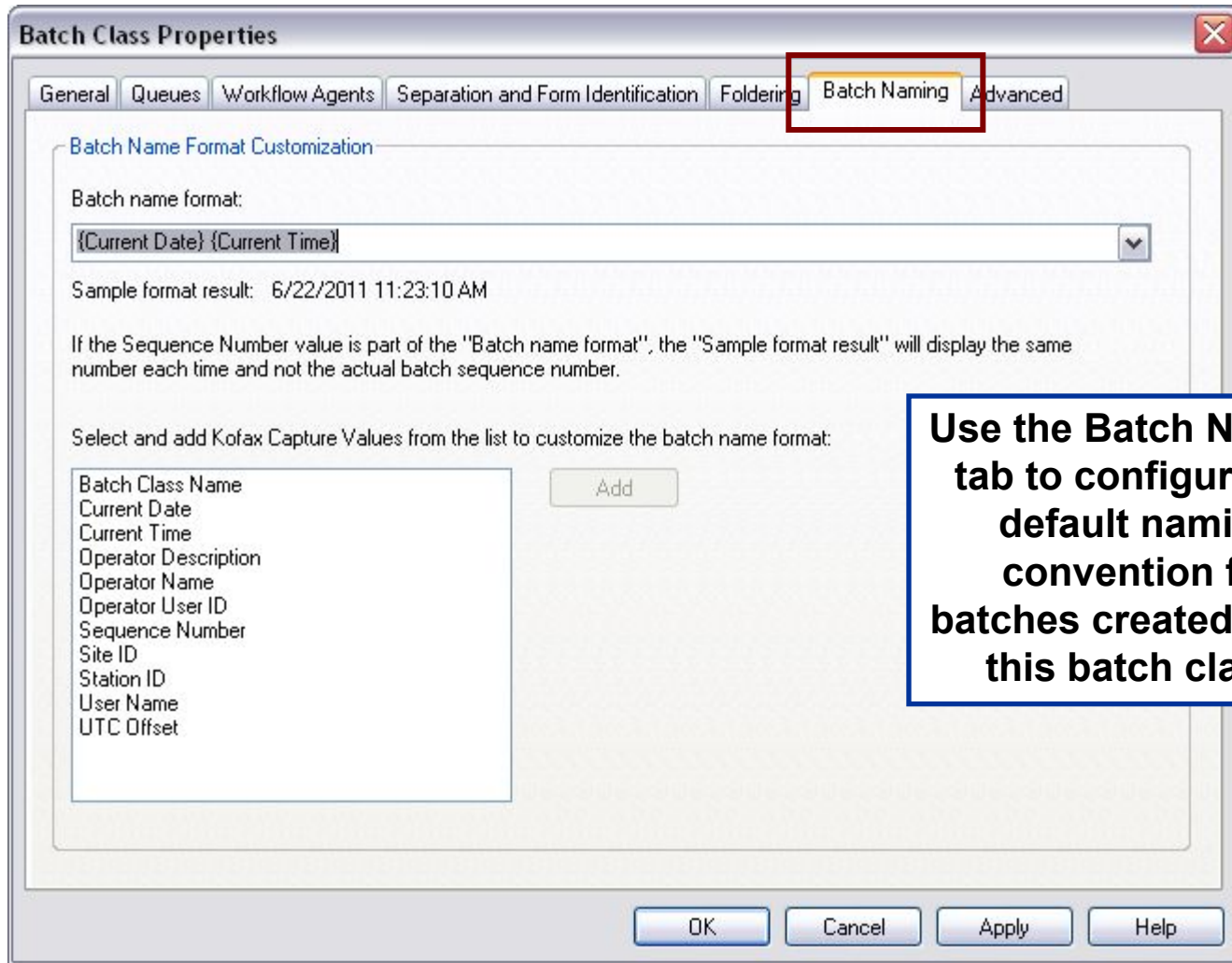
Allow batch editing

OK Cancel Help

Changing Separation and Form Identification



Automatic Batch Naming



Use the Batch Naming tab to configure the default naming convention for batches created using this batch class.

Determining the Default Batch Naming Convention

Batch Class Properties

General Queues Workflow Agents Separation and Form Identification Foldering **Batch Naming** Advanced

Batch Name Format Customization

Batch name format:
{Batch Class Name} / {Site ID} / {Station ID}

Sample format result: Product Orders / 1 / Student01

If the Sequence Number value is part of the "Batch name format", the "Sample format" will change every time the Sequence Number value changes and not the actual batch sequence number.

Select and add Kofax Capture Values from the list to customize the batch name format:

Batch Class Name [Add]
Current Date
Current Time
Operator Description
Operator Name
Operator User ID
Sequence Number
Site ID
Station ID

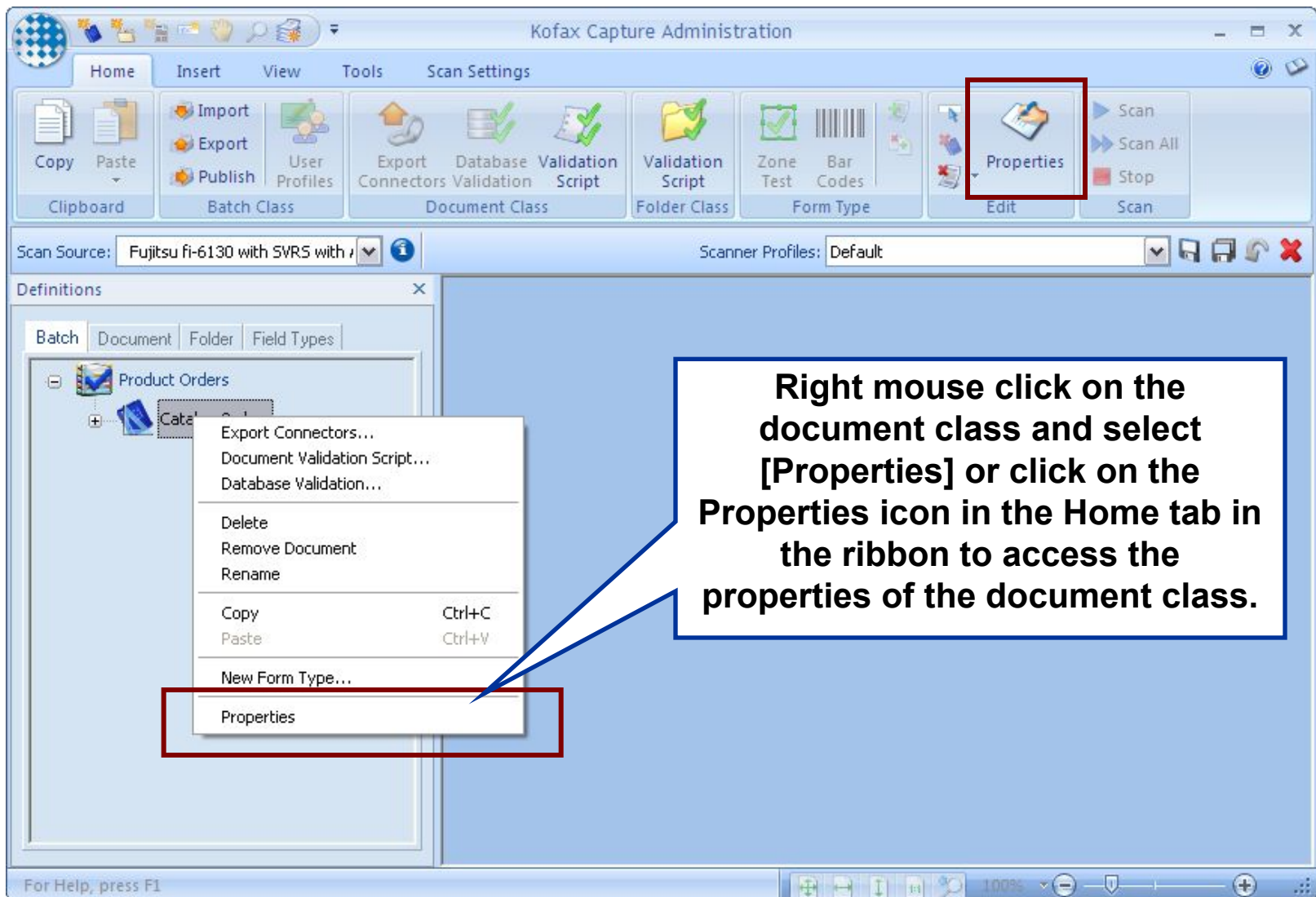
The format of the batch name will reflect the values selected from the list below.

Select the values from the supplied list of available values and click [Add].

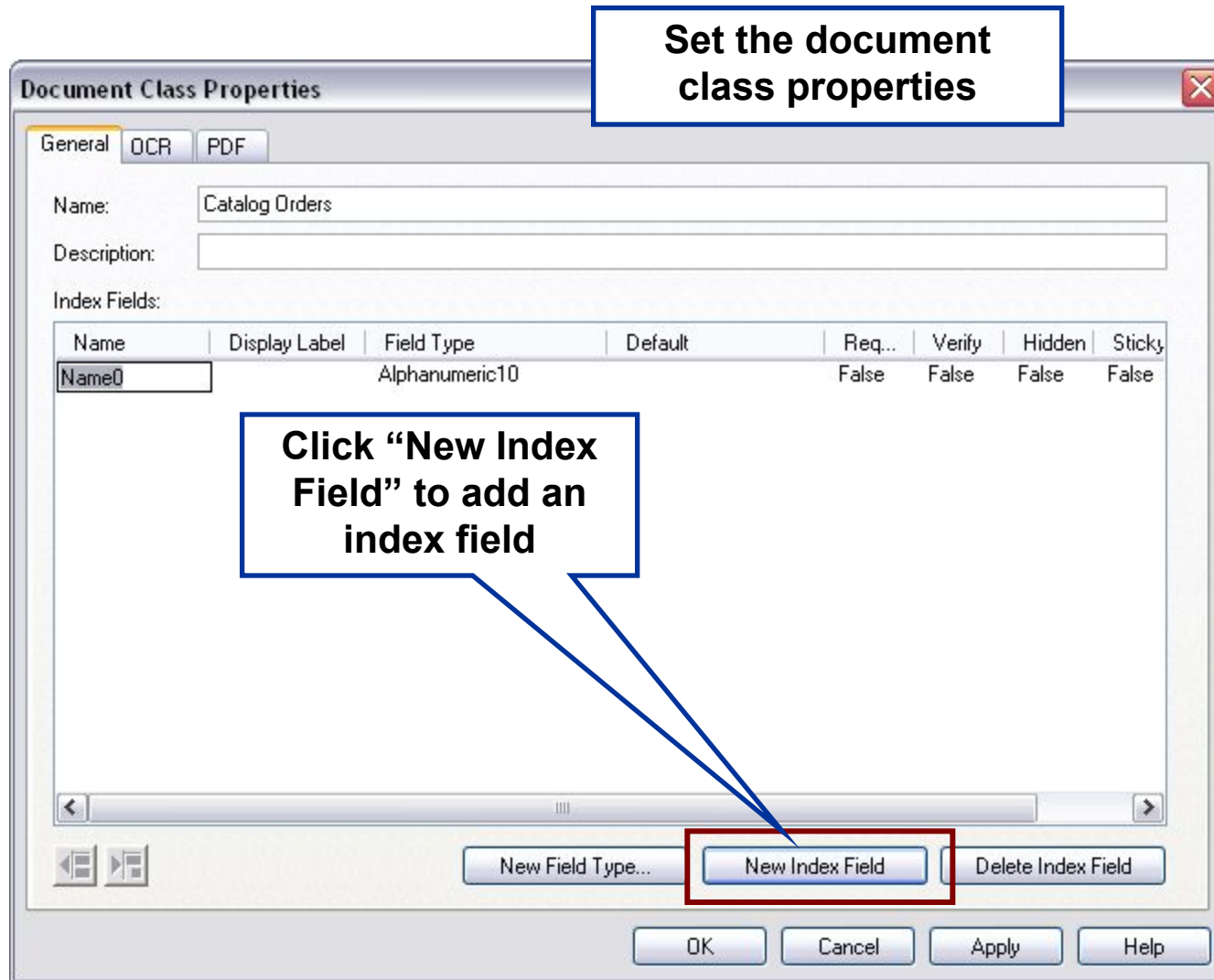
A sample format of the batch name is created reflecting the selected values.

OK Cancel Apply Help

Setting Document Class Properties



Document Class Setup -- Adding Index Fields



Index (or Data) Field Settings

The screenshot shows the 'Document Class Properties' dialog box with the 'OCR' tab selected. The 'Name' field is set to 'Catalog Orders'. The 'Index Fields' table contains one entry: 'Customer Number' with a 'Display Label' of 'Number' and a 'Field Type' of 'Alphanumeric10'. The 'Req...' column is 'False', 'Verify' is 'False', and 'Hidden' is 'False'. The dialog also features buttons for 'New Field Type...', 'New Index Field', 'Delete Index Field', 'OK', 'Cancel', 'Apply', and 'Help'.

Name	Display Label	Field Type	Default	Req..	Verify	Hidden	:
Customer Number	Number	Alphanumeric10		False	False	False	F

Overtyping "Name0" with the index field name.

Select from the dropdown for Field Type.

Enter a different value for Display Label if the label viewed by the Validation and Verification operators is to be different than the field name.

(We'll discuss the other settings in later training modules.)

Saving Index Fields

The image shows two overlapping dialog boxes from a software application. The background dialog is 'Document Class Properties' with the 'General' tab selected. It shows a document named 'Catalog Orders' and a table of index fields. The foreground dialog is 'Create Field Type' with the 'Values' tab selected, showing settings for a field named 'State' with a data type of 'VARCHAR' and 2 characters.

Document Class Properties

General | OCR | PDF

Name: Catalog Orders

Description:

Index Fields:

Name	Display Label	Field Type	Default	Req..	Verify	Hidden	:
Customer Number	Number	Alphanumeric10		False	False	False	F
Name		Alphanumeric20		False	False	False	F

Create Field Type

General | Values

Name: State

Description:

Dictionary: Browse...

Data type: VARCHAR

Number of characters: 2

Subtype: (None)

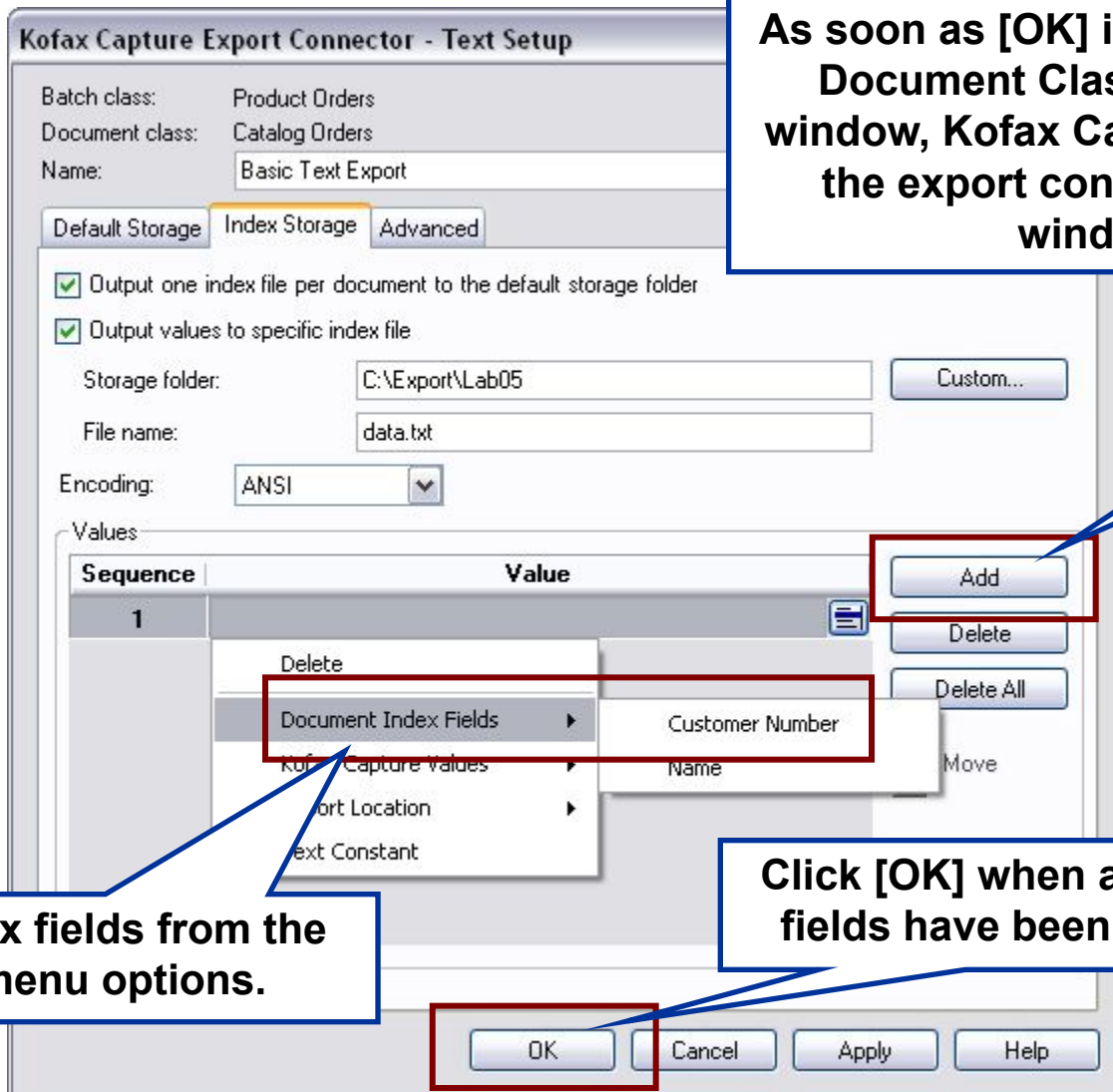
Buttons: Save, Close, Help

Document Class Properties Buttons: New Field Type..., New Index Field, Delete Index Field, OK, Cancel, Apply, Help

Callouts:

- Create additional index fields as required.
- For convenience, a new field type can be created right from the Document Class Properties window by clicking on [New Field Type]
- Click [OK] when settings are complete

Adding Index Fields to the Export Connector



As soon as [OK] is clicked on the Document Class Properties window, Kofax Capture will open the export connector setup window

Click [Add], then...

Select index fields from the fly-out menu options.

Click [OK] when all index fields have been added

Modifying Form Type Properties

The screenshot displays the Kofax Capture Administration interface. The main window has a menu bar with 'Home', 'Insert', 'View', 'Tools', and 'Scan Settings'. Below the menu bar is a toolbar with various icons. A red box highlights the 'Properties' icon in the toolbar. A callout box with a blue border and white background contains the text: "Right mouse click on the form type and select [Properties]". In the main window, the 'Definitions' pane shows a tree view with 'Product Orders' expanded to show 'Catalog Orders', which is further expanded to show 'Northwest'. A right-click context menu is open over 'Northwest', with a red box highlighting the 'Properties' option. The 'Form Type Properties' dialog box is open, showing the 'General' tab. The dialog has fields for 'Name' (Northwest), 'Description', and 'Document class' (Catalog Orders). There is a checkbox for 'Fixed number of pages' and a spinner box set to '1'. At the bottom of the dialog are 'OK', 'Cancel', 'Apply', and 'Help' buttons.

Setting Fixed Number of Pages

The screenshot shows the 'Form Type Properties' dialog box with the 'General' tab selected. The 'Name' field contains 'Northwest', 'Description' is empty, and 'Document class' is 'Catalog Orders'. The 'Fixed number of pages' checkbox is checked and highlighted with a red box. Below it, the number '1' is entered in a spinner box. At the bottom are buttons for 'OK', 'Cancel', 'Apply', and 'Help'.

Since “Kofax Fixed Pages” is being used as the method of separation for this batch class, the number of pages must be set for the form type here.

Setting Page Level Barcodes

The screenshot shows a dialog box titled "Form Type Properties" with three tabs: "General", "Image", and "Page Level Bar Code". The "Page Level Bar Code" tab is active. Inside the dialog, there is a "Profiles:" label followed by a dropdown menu showing "Kofax 3 of 9 Bar Code" and a small downward arrow. To the right of the dropdown is an "Edit..." button. Below this, there is a "Maximum bar codes per line:" label followed by a text box containing the number "1" and two small arrow buttons (up and down). At the bottom of the dialog are four buttons: "OK", "Cancel", "Apply", and "Help".

Accept the “Kofax 3 of 9 Bar Code” profile. There is only one bar code per line.

Two bar code options are available out-of-the-box: “3 of 9” and “128”. If the bar code is a different type, these standard profiles could be edited (via the [Edit] button).

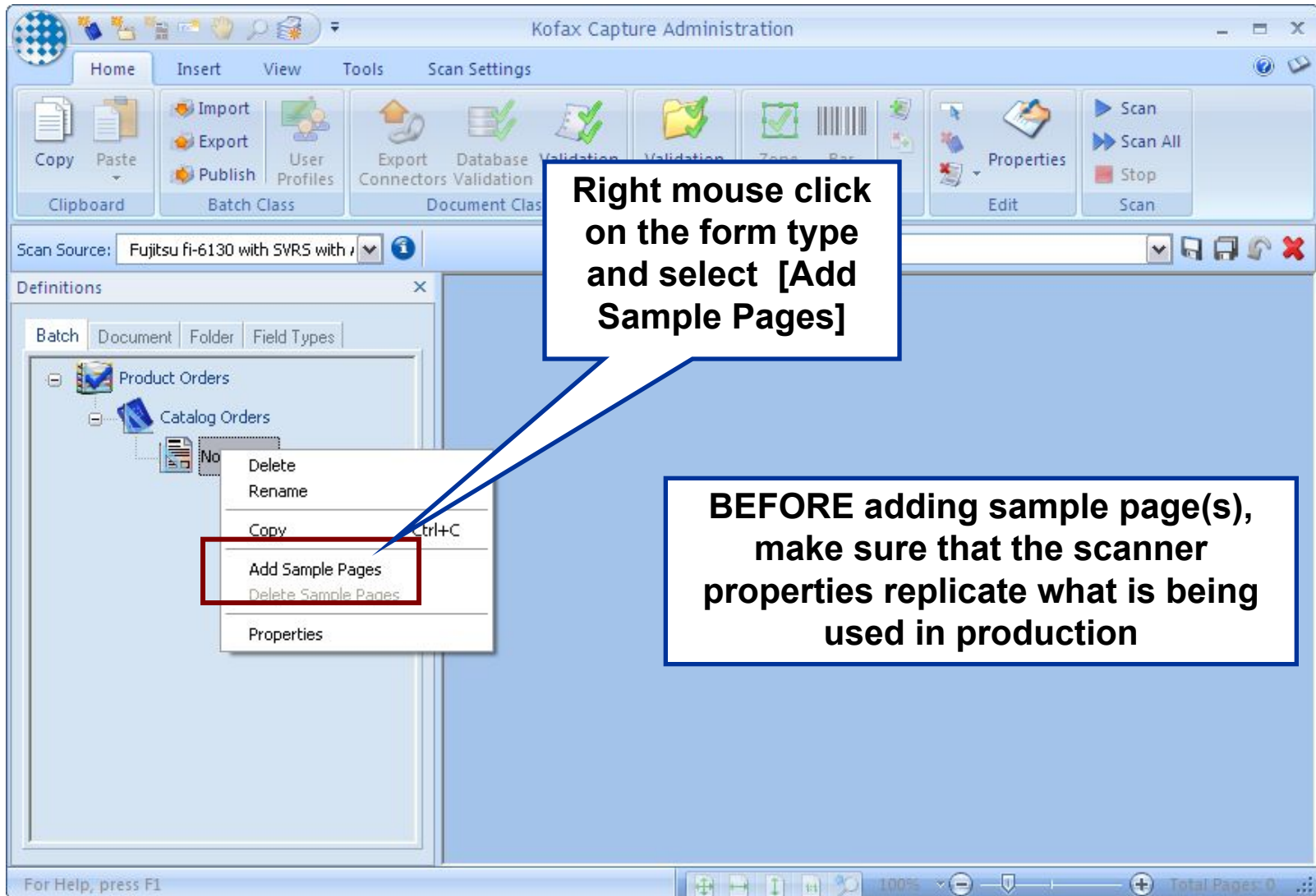
Sample Pages

- Kofax Capture uses *template-based extraction*.
- Elements (for example, data to be extracted) on structured documents is consistently located in the same location.
- A template that closely approximates the pages being input or scanned in production can be utilized to define all the actions Kofax Capture needs to perform in production.
- A **sample page** is a template.
- Administrators use sample pages in the Administration module to define the specific locations (via zones), the activities to be performed, and the technology to be used by Kofax Capture.

Requirements and Guidelines for Sample Pages

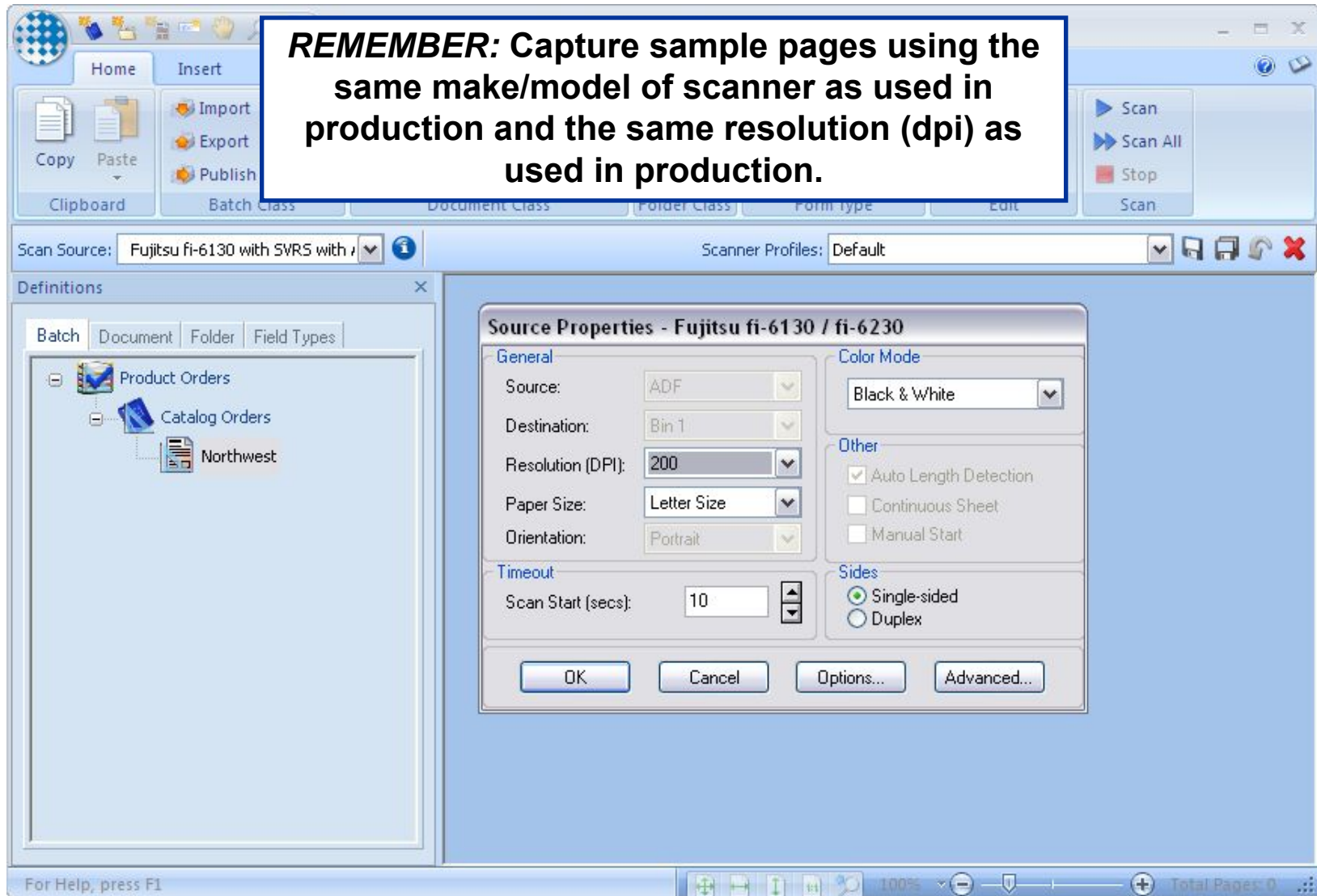
- A sample page is required when:
 - Setting automatic form identification
 - Defining zones for indexing, recognition, registration, or separation
 - Setting page-level barcodes
- Requirements/guidelines for creating a sample page include:
 - Input using same make/model of scanner as used in production
 - Input using same resolution (dpi) as used in production
 - Must have same number of pages as production documents
 - Must be a TIF file – no eDocuments

Adding Sample Pages



Set Scanner Properties to Match Production

REMEMBER: Capture sample pages using the same make/model of scanner as used in production and the same resolution (dpi) as used in production.



Scanner Properties and Profiles

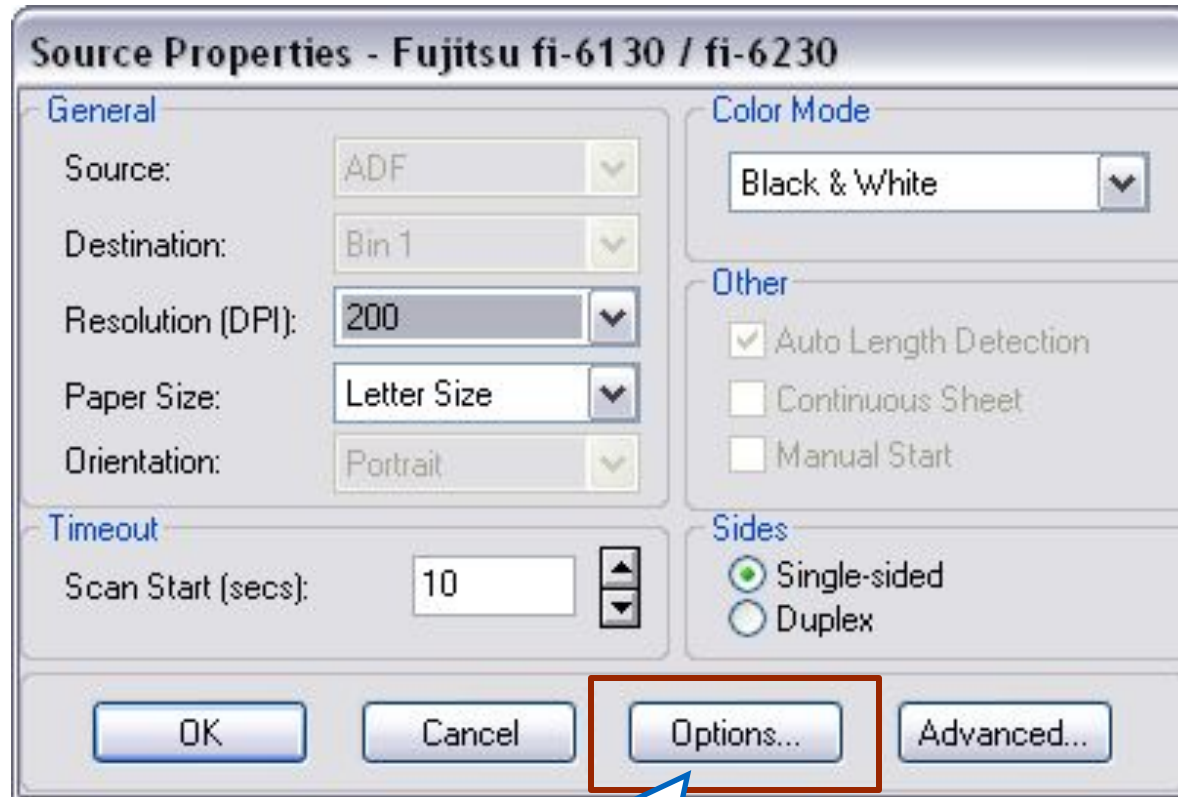
- Source Properties provide parameters for continued use after being setup once
 - Scan resolution (examples: 100, 200, 300 dots per inch [dpi])
 - Paper size (examples: legal, letter, A4)
 - Blank Page Thresholds
 - Color modes (color or black-and-white scanning)
 - Orientation (landscape versus portrait)
 - Simplex versus duplex mode
 - Advanced properties
- Scanner Profiles provide parameters for attached scanners
 - Scanner settings are defined once
 - Profiles can be selected from an available list
 - Scanners may have multiple profiles for added flexibility

Select the Scan Source

The screenshot displays the Kofax software interface. At the top, a ribbon menu includes 'Home', 'Insert', and 'View'. Below the ribbon, a toolbar contains various icons, including a blue circular icon with a white 'i' (the 'Edit Scan Source Settings' icon). A callout box points to this icon with the text 'Click the [Edit Scan Source Settings] icon'. Below the toolbar, the 'Scan Source' dropdown menu is highlighted with a red box and contains the text 'Fujitsu fi-6130 with SVRS with /'. A callout box points to this dropdown with the text 'Select the scan source'. The main area of the interface shows a 'Definitions' pane on the left with a tree view containing 'Product Orders', 'Catalog Orders', and 'Northwest'. On the right, a 'Source Properties - Fujitsu fi-6130 / fi-6230' dialog box is open, showing settings for 'General', 'Color Mode', 'Other', and 'Sides'. The 'General' section includes 'Source' (ADF), 'Destination' (Bin 1), 'Resolution (DPI)' (200), 'Paper Size' (Letter Size), and 'Orientation' (Portrait). The 'Color Mode' is set to 'Black & White'. The 'Other' section has 'Auto Length Detection' checked. The 'Sides' section has 'Single-sided' selected. At the bottom of the dialog are 'OK', 'Cancel', 'Options...', and 'Advanced...' buttons. The status bar at the bottom of the window shows 'For Help, press F1', '100%', and 'Total Pages: 0'.

Set the Source Properties

Source Properties change based on the scanner installed



Select [Options] to review or define scanner options

Scanner Options

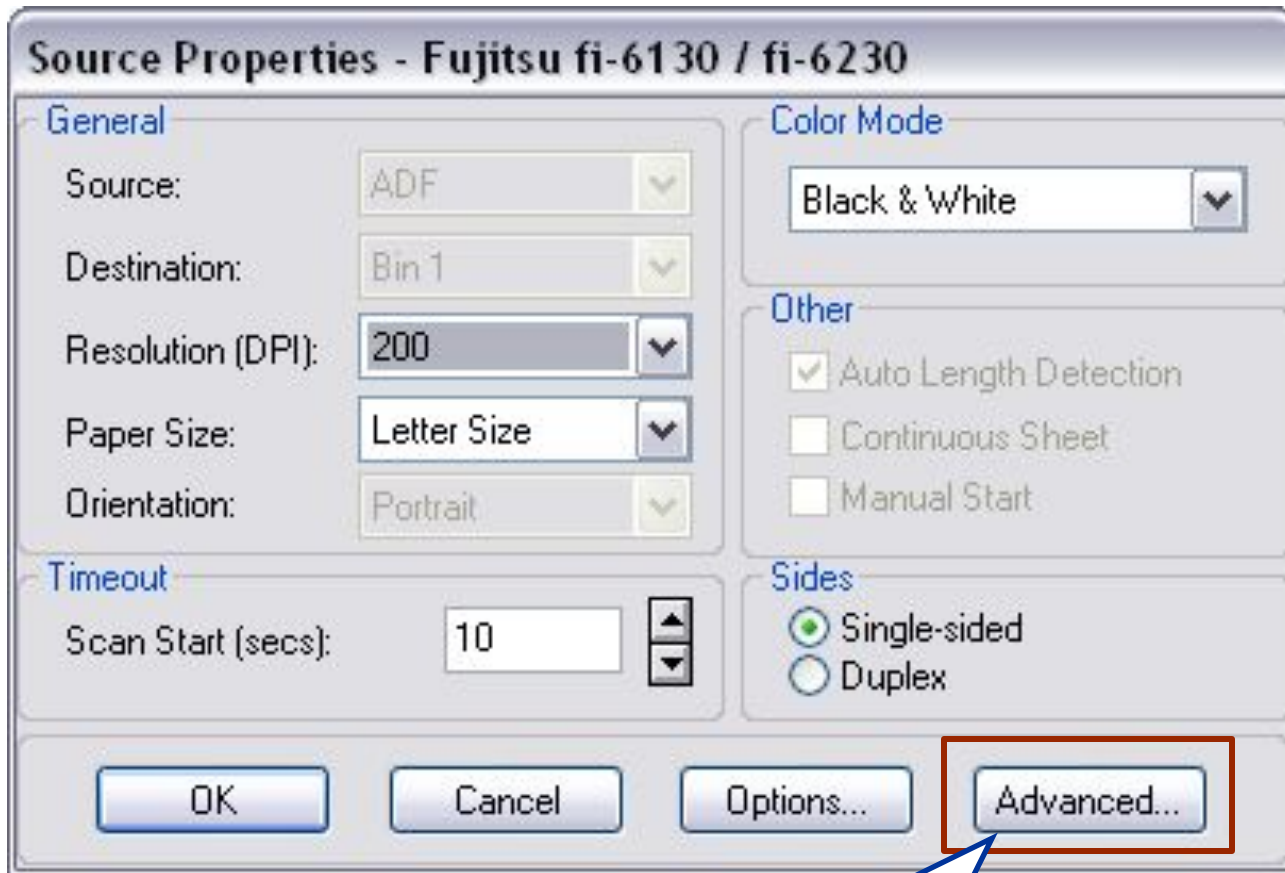
Additional scanner options are available based on the scanner

The image shows a 'Source Properties' dialog box with the following sections and controls:

- Front Picking Rectangle:** Includes an 'Enabled' checkbox, radio buttons for 'English (in)' (selected) and 'Pixels', and input fields for Top, Left, Width, and Height, each with a spinner control. All values are currently 0.00.
- Back Picking Rectangle:** Identical to the front section, with 'English (in)' selected and all values at 0.00.
- Front Rotation:** Radio buttons for 0 (selected), 90, 180, and 270 degrees.
- Back Rotation:** Radio buttons for 0 (selected), 90, 180, and 270 degrees.
- Front Delete Blank Page Threshold:** An 'Enabled' checkbox and a text input field containing '0'.
- Back Delete Blank Page Threshold:** An 'Enabled' checkbox and a text input field containing '0'.
- Options:** 'Prescan (cache):' with a spinner set to '1' and 'Page Timeout (secs):' with a spinner set to '15'.

At the bottom of the dialog are 'OK' and 'Cancel' buttons.

Advanced Properties



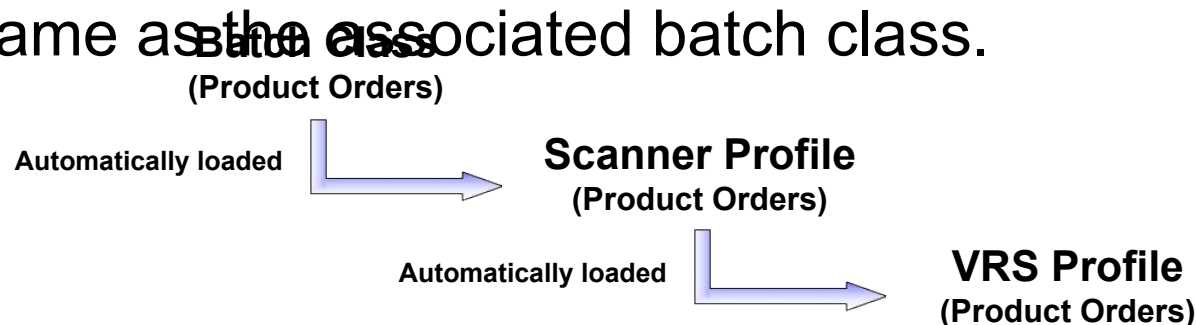
Select [Advanced] to review or define additional scanner properties

Advanced Options – the VRS Interactive Viewer

The [Advanced] button launches the Kofax VRS Interactive Viewer for configuring VRS-related scan settings

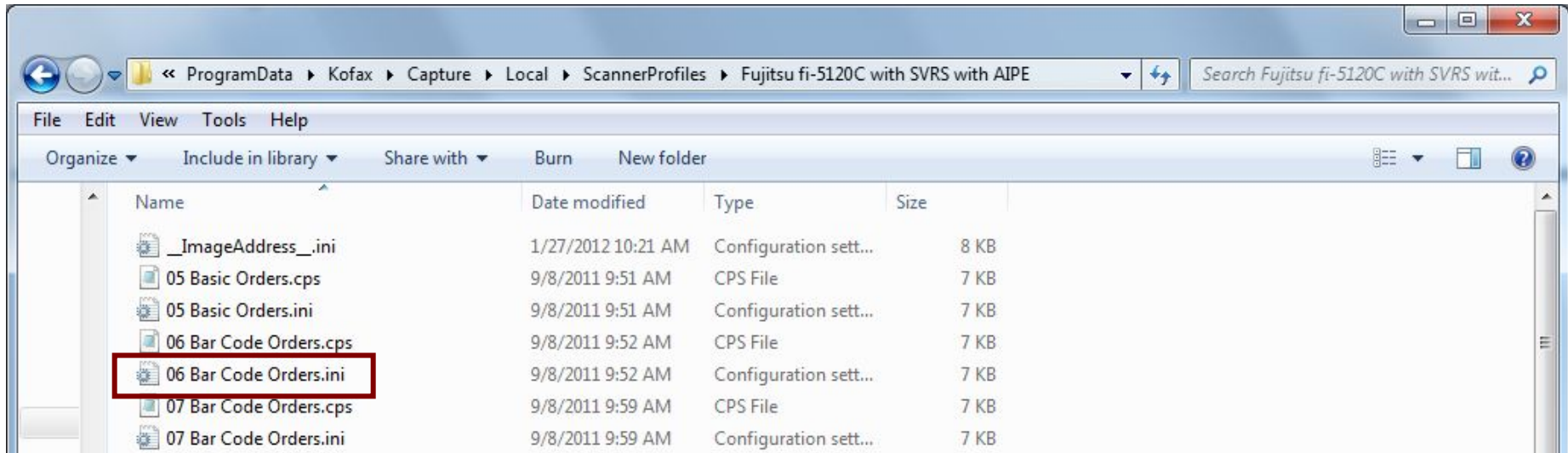
Naming and Loading Scanner Profiles

- Normally, when a batch is opened in the Scan module, Kofax Capture searches for and loads scan profiles in the following order:
 1. Looks for a profile with the same name as the batch class for that batch.
 2. If there is none, then looks for a profile called "Default".
 3. If there is none, then leaves the existing profile in place (if any) or defaults to the default settings of the scanner.
- Therefore, if specific settings for a batch are desired to load automatically at scan time, create a scan profile with the same name as the associated batch class.



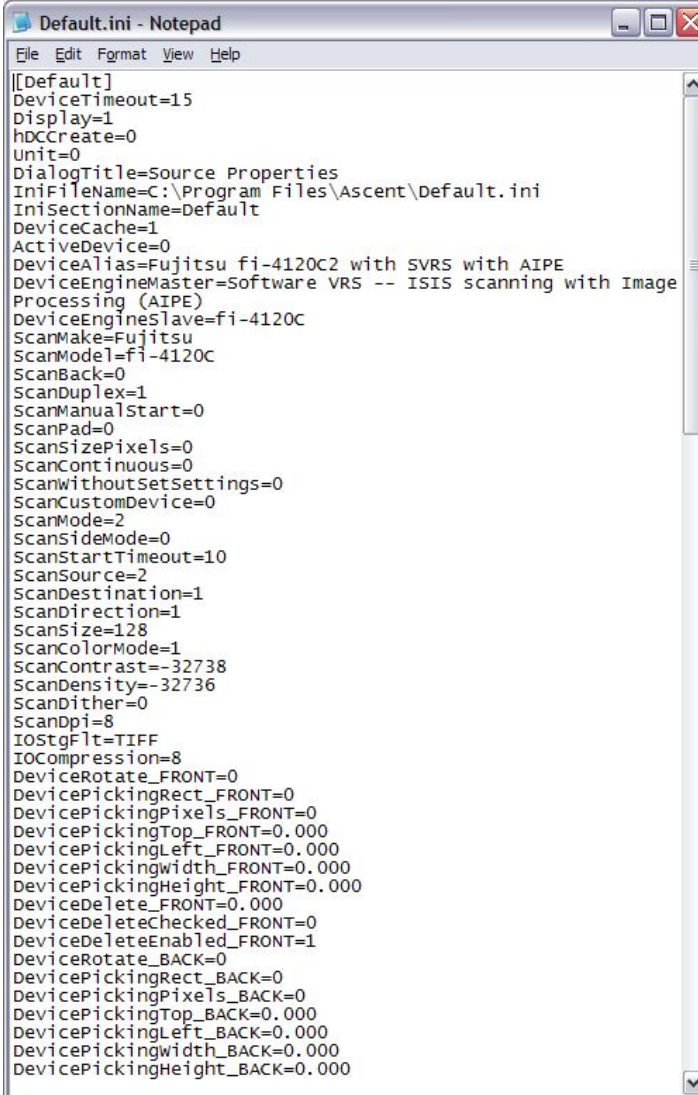
Saved Scanner Profile Source Files

**Scanner profiles are stored as .ini files in a directory created by Kofax Capture identified by the scan source in the following directory:
*ProgramData\Kofax\Capture\Local\ScannerProfiles [scan source]***



Viewing Scanner Profile File Contents

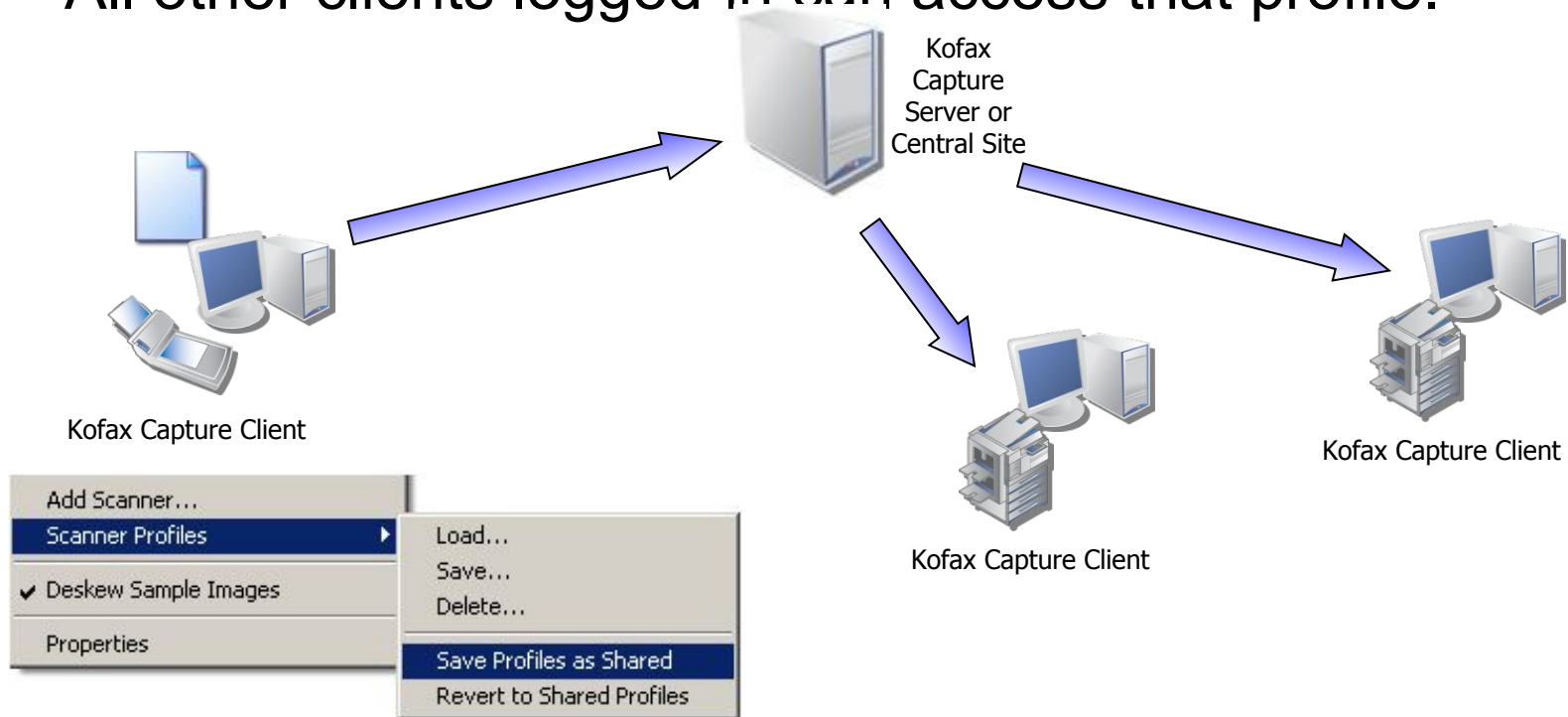
Opening the scanner profiles in a test editor (Notepad) will display all the scan settings



```
Default.ini - Notepad
File Edit Format View Help
[Default]
DeviceTimeout=15
Display=1
hdCCreate=0
unit=0
DialogTitle=Source Properties
IniFileName=C:\Program Files\Ascent\Default.ini
IniSectionName=Default
DeviceCache=1
ActiveDevice=0
DeviceAlias=Fujitsu fi-4120C2 with SVRS with AIPE
DeviceEngineMaster=Software VRS -- ISIS scanning with Image
Processing (AIPE)
DeviceEngineSlave=fi-4120C
ScanMake=Fujitsu
ScanModel=fi-4120C
ScanBack=0
ScanDuplex=1
ScanManualStart=0
ScanPad=0
ScanSizePixels=0
ScanContinuous=0
ScanWithoutSetSettings=0
ScanCustomDevice=0
ScanMode=2
ScanSideMode=0
ScanStartTimeout=10
ScanSource=2
ScanDestination=1
ScanDirection=1
ScanSize=128
ScanColorMode=1
ScanContrast=-32738
ScanDensity=-32736
ScanDither=0
ScanDpi=8
IOStgFlt=TIFF
IOCompression=8
DeviceRotate_FRONT=0
DevicePickingRect_FRONT=0
DevicePickingPixels_FRONT=0
DevicePickingTop_FRONT=0.000
DevicePickingLeft_FRONT=0.000
DevicePickingwidth_FRONT=0.000
DevicePickingHeight_FRONT=0.000
DeviceDelete_FRONT=0.000
DeviceDeleteChecked_FRONT=0
DeviceDeleteEnabled_FRONT=1
DeviceRotate_BACK=0
DevicePickingRect_BACK=0
DevicePickingPixels_BACK=0
DevicePickingTop_BACK=0.000
DevicePickingLeft_BACK=0.000
DevicePickingwidth_BACK=0.000
DevicePickingHeight_BACK=0.000
```

Centralized Scanner Configuration

- Once created, scanner profiles can be shared over the entire Kofax Capture network in a client-server deployment.
 - When setting the profile at one client station, an option is provided to save the profile to the Kofax Capture server.
 - All other clients logged-in can access that profile.



The Sample Page is Ready for Setup

The screenshot displays the Kofax Capture Administration interface. The top menu bar includes Home, Insert, View, Tools, and Scan Settings. Below the menu is a ribbon with various tool groups: Clipboard (Copy, Paste), Batch Class (Import, Export, Publish), Document Class (Export Connectors, Database Validation, Validation Script), Folder Class (Validation Script), Form Type (Zone Test, Bar Codes), Edit (Properties), and Scan (Scan, Scan All, Stop). The main window shows a 'Definitions' pane on the left with a tree view containing 'Product Orders', 'Catalog Orders', and 'Northwest'. Under 'Northwest', 'Sample page 1' is selected, and its sub-items 'Form ID Zones', 'Registration Zones', 'Index Zones', and 'Page Level Bar Co' are visible. A red box highlights this tree view. The main area shows a sample form for 'Northwest Products' with fields for 'Ship To' (First Name, Last Name, Address, City, State, Zip+Phone Code) and 'Ordered By' (Name, Address, City, State, Zip+Phone Code). A blue box with a white background and black text is overlaid on the form, pointing to the 'Sample page 1' icon in the tree view. The text in the blue box reads: 'A sample page icon is attached to the form type. When expanded, place holders for zones are visible.' The bottom status bar shows 'For Help, press F1', a zoom level of 18%, and 'Page 1 of 1'.

Setting up Page level Bar Codes

Expand the Sample Page icon and select [Page Level Bar Codes], then [Properties]

Page level barcodes are read left-to-right and top-to-bottom.

The (skip bar code) function may be used multiple times.

Associate the index field(s) with the bar code(s) on the page. When done, click [Add].

Adding Index Fields

Ordered By:

Bill Slater

365 Planter Street

New York, NY

07326



* 6 7 3 4 2 1 8 9 5 *

In addition to the page level barcodes, we also want to capture a value for the customer name

W	A	Y					
---	---	---	--	--	--	--	--

--	--	--	--	--	--	--	--

Fields and Field Types

Use the zoom tool to magnify the area for enhancing accuracy when drawing a zone.

The screenshot shows the Kofax Capture Administration interface. The 'Scan Settings' toolbar is visible, with the 'Zoom' tool highlighted. The background shows a scanned document with various fields and a table.

Quantity	Unit	Description	Unit Price	Amount
1	638	LANG STORAGE PIV SERVER	32.95	32.95
			Subtotal	32.95
			Sales Tax	2.55
			Shipping	5.00
			Total	40.50

Choose the Index Zone Icon

The screenshot displays the Kofax Capture Administration interface. The 'Insert' tab is active, and the 'Index' icon is highlighted with a red box. A blue callout box points to this icon with the text: "Select the 'Index Zone' icon from the Insert tab". Below the callout, a tree view shows the 'Index Zones' folder expanded. The main preview area shows a document with the following text: "Bill Slater", "365 Planter Street", "New York, NY", "07326", and a barcode with the number "* 6 7 3 4 2 1 8 9 5 *". At the bottom of the preview, there is a row of seven boxes, with the first two containing the letters "A" and "Y".

Draw the Zone and Configure the Properties

With the left mouse button depressed, draw a box around the element.

Leave extra room on the right to accommodate longer values than the sample. Release the mouse button.

When the Create Index Zone window appears, select the associated field from the dropdown.

Click [OK] to complete the setup.

Publish After Changes

Remember, publishing after changes are made to a batch class makes these changes effective for all new batches.

Scan Source: Software Import

Scanner Profiles:

Definitions

Batch Class | Last Published

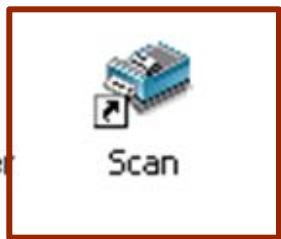
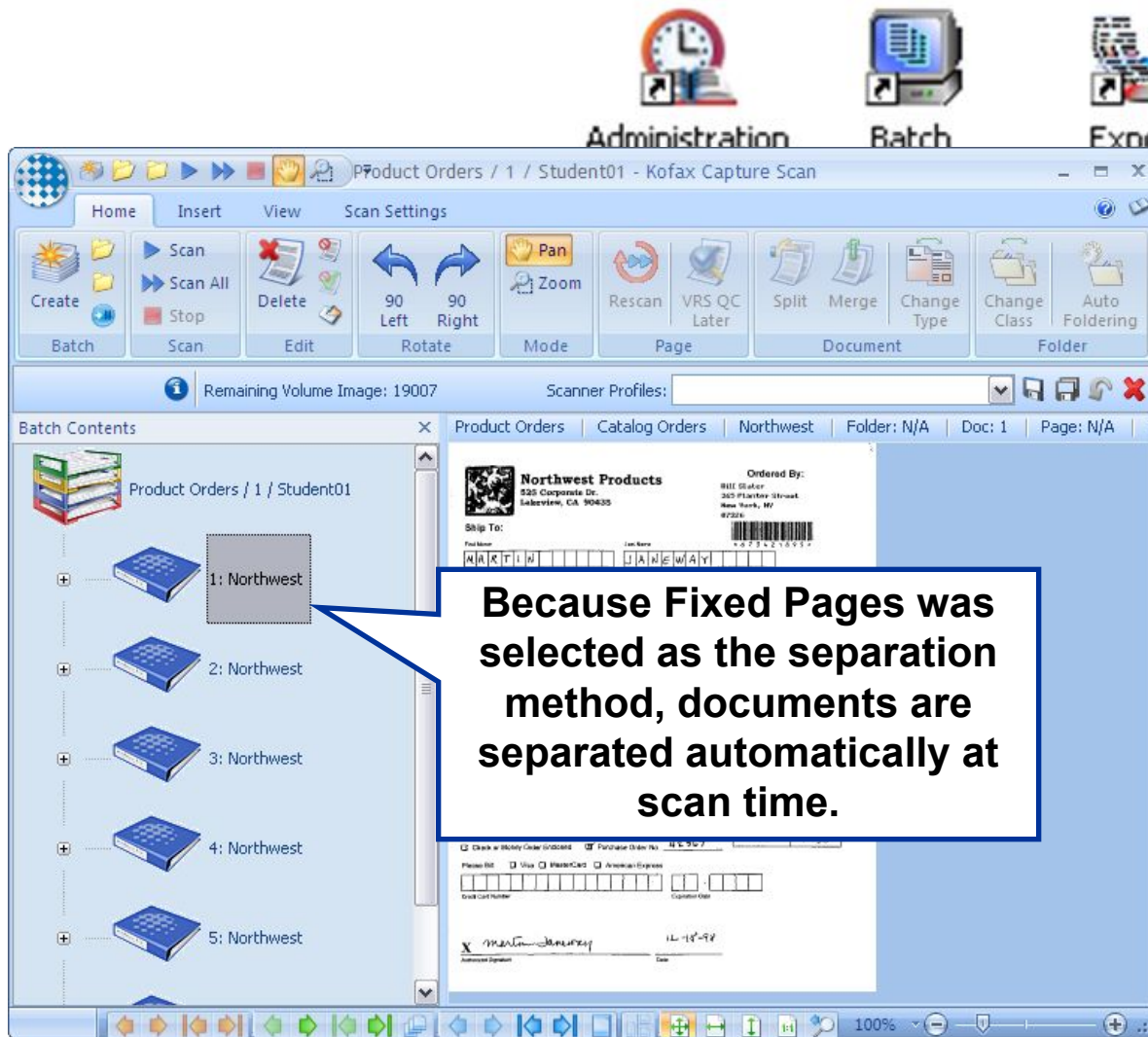
Batch Class	Last Published
Product Orders	6/22/2011 3:42:08 PM

Buttons: Validate, Publish, Disable, Select All, Close, Help

Results:

Publishing: Product Orders
Validating batch integrity...
Checking for errors...
0 warnings; 0 errors
Publishing in progress...
Publishing successful: Product Orders

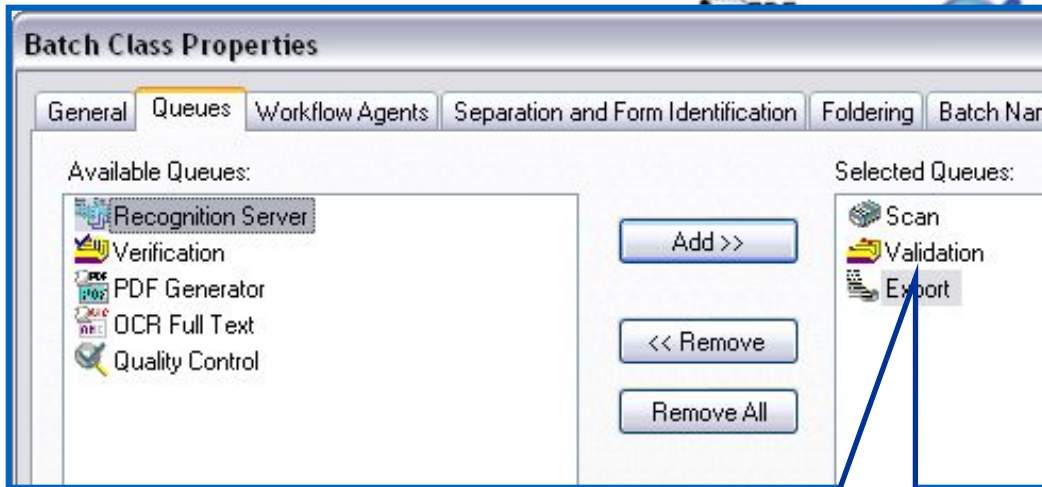
Creating the Batch



In processing the batch, first open the Scan module, create the batch, and capture the documents.

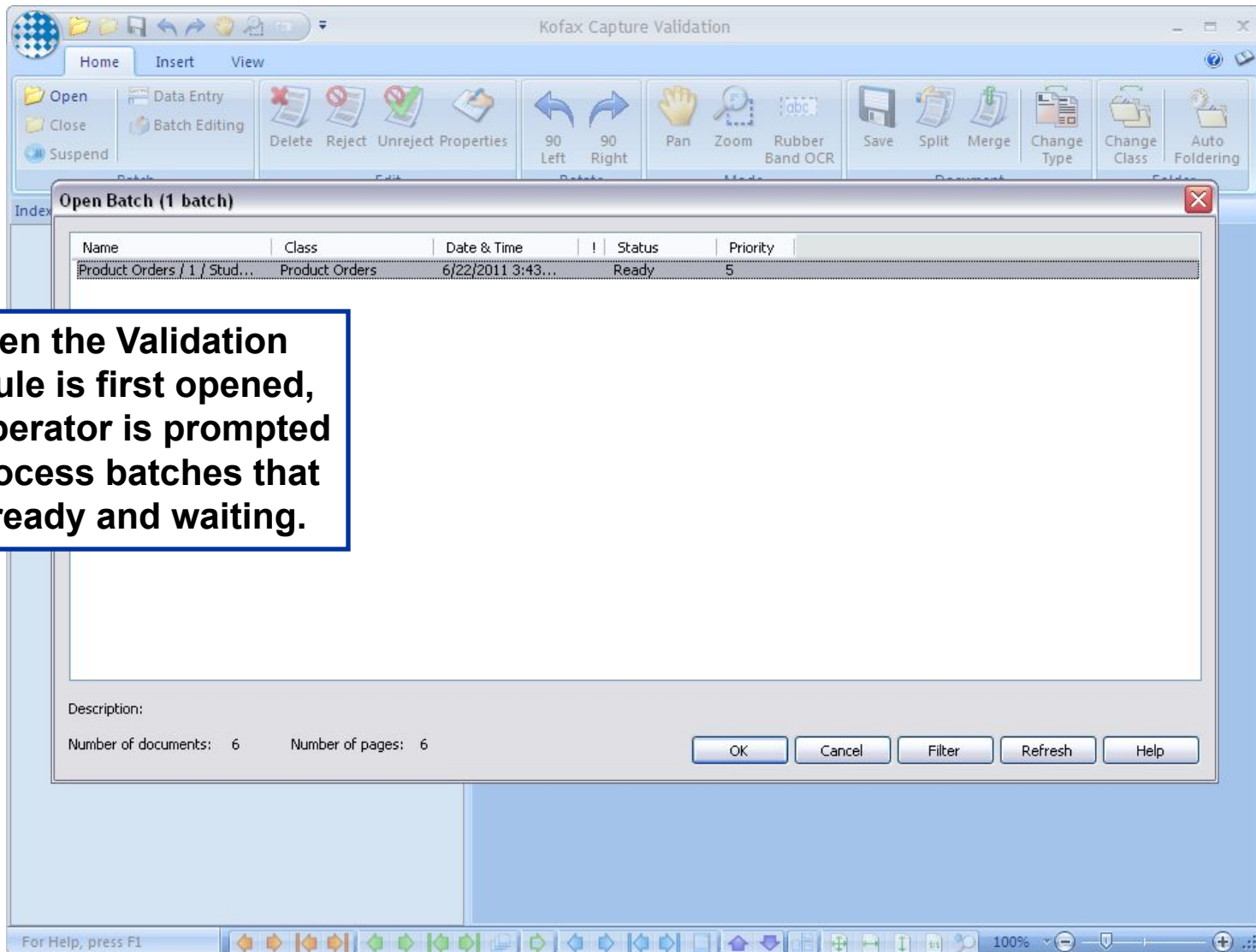
Opening the Validation Module

After the Scan module is closed, the Validation queue is opened from the Kofax Capture program group.



Remember, in this batch class, Validation was configured as part of the workflow

Selecting and Opening Batches



Manual Data Entry

The screenshot displays the Kofax Capture Validation software interface. The title bar reads "Product Orders / 1 / Student01 - Kofax Capture Validation". The ribbon menu includes "Home", "Insert", and "View". The "Home" ribbon contains several groups of icons: "Batch" (Open, Close, Suspend, Batch Editing), "Edit" (Delete, Reject, Unreject, Properties), "Rotate" (90 Left, 90 Right), "Mode" (Pan, Zoom, Rubber Band OCR), "Document" (Save, Split, Merge, Change Type), and "Folder" (Change Class, Auto Folders). The "Index Fields" pane on the left shows two input fields: "Customer Number: 673421895" and "Name: Bill Slater". A blue callout box points to the "Customer Number" field with the text: "In this batch, the value for the Customer Number field was acquired when the bar code was read". Another blue callout box points to the "Name" field with the text: "The Validation operator can enter data from the image which has not been automatically extracted." The main workspace shows a document with the following text: "Bill Slater", "365 Planter Street", "New York, NY", and "07326". A barcode is visible at the bottom of the document. The status bar at the bottom indicates "For Help, press F1" and "24%".

Validation Module

The screenshot displays the Kofax Capture Validation software interface. The main window title is "Product Orders / 1 / Student01 - Kofax Capture Validation". The interface includes a ribbon with "Home", "Insert", and "View" tabs. A right-click context menu is open over the Kofax button (a globe icon) in the top-left corner. The menu options are:

- Customize Quick Access Toolbar...
- Show Quick Access Toolbar Below the Ribbon
- Minimize the Ribbon
- Suspend
- Batch
- Edit
- Properties

The background shows a form for "Product Orders" with fields for "Number" (673421895), "Name" (Bill Slater), and "Ship To" information (MARTIN, 19 POW, MA NH E, USA). A table shows a quantity of 1 for item # 638. A summary table at the bottom right shows:

Subtotal	32.95
Sales Tax	2.55
Shipping	5.00
Total	40.50

The interface also shows a status bar at the bottom with "71%" zoom and a navigation bar.

Right mouse click on the Kofax button to expose view options

Validation Module Options

The screenshot displays the Kofax Capture Validation software interface. The main window shows a document titled "Product Orders / 1 / Student01 - Kofax Capture Validation". A toolbar on the left contains various batch management icons, with the "Options" button highlighted by a red box. A callout box points to the "Options" button, stating: "Left mouse click on the Kofax Button to expose the menu items". Another callout box points to the "Options" button, stating: "Left mouse click on [Options] provides for settings designed to enhance the Validation operators' productivity and accuracy". The "Options" dialog box is open, showing the "General" tab. It contains sections for "Editing Options", "Last Field Accepted Behavior", "End of Batch Behavior", and "Display". The "Editing Options" section has a checked checkbox for "Enter key moves to next field". The "Last Field Accepted Behavior" section has an unchecked checkbox for "Prompt before closing document". The "End of Batch Behavior" section has checked checkboxes for "Prompt before closing batch" and "Wait for next batch", and an unchecked checkbox for "Open next batch automatically". The "Display" section has a "Color scheme" dropdown set to "Blue theme" and a "Language" dropdown set to "<Windows display language>". At the bottom of the dialog are "OK", "Cancel", "Apply", and "Help" buttons. A callout box on the right side of the dialog states: "NOTE: The Tab key is the default termination key." The background shows a document with a barcode and the text "9 5 *".

Filtering Batches

The screenshot displays the Kofax Capture Validation interface. On the left, a sidebar contains several batch management actions: Open Batch, Delete Batch, Suspend Batch, Close Batch, Filter Batches (highlighted with a red box), and Batch Properties. A callout box points to the 'Filter Batches' icon with the text: "Batches can be filtered for selective viewing and processing".

The main window shows a batch thumbnail with the following details:
Customer Number: 673421895
Name: Bill Slater
Ordered By: Bill Slater
365 Planter Street

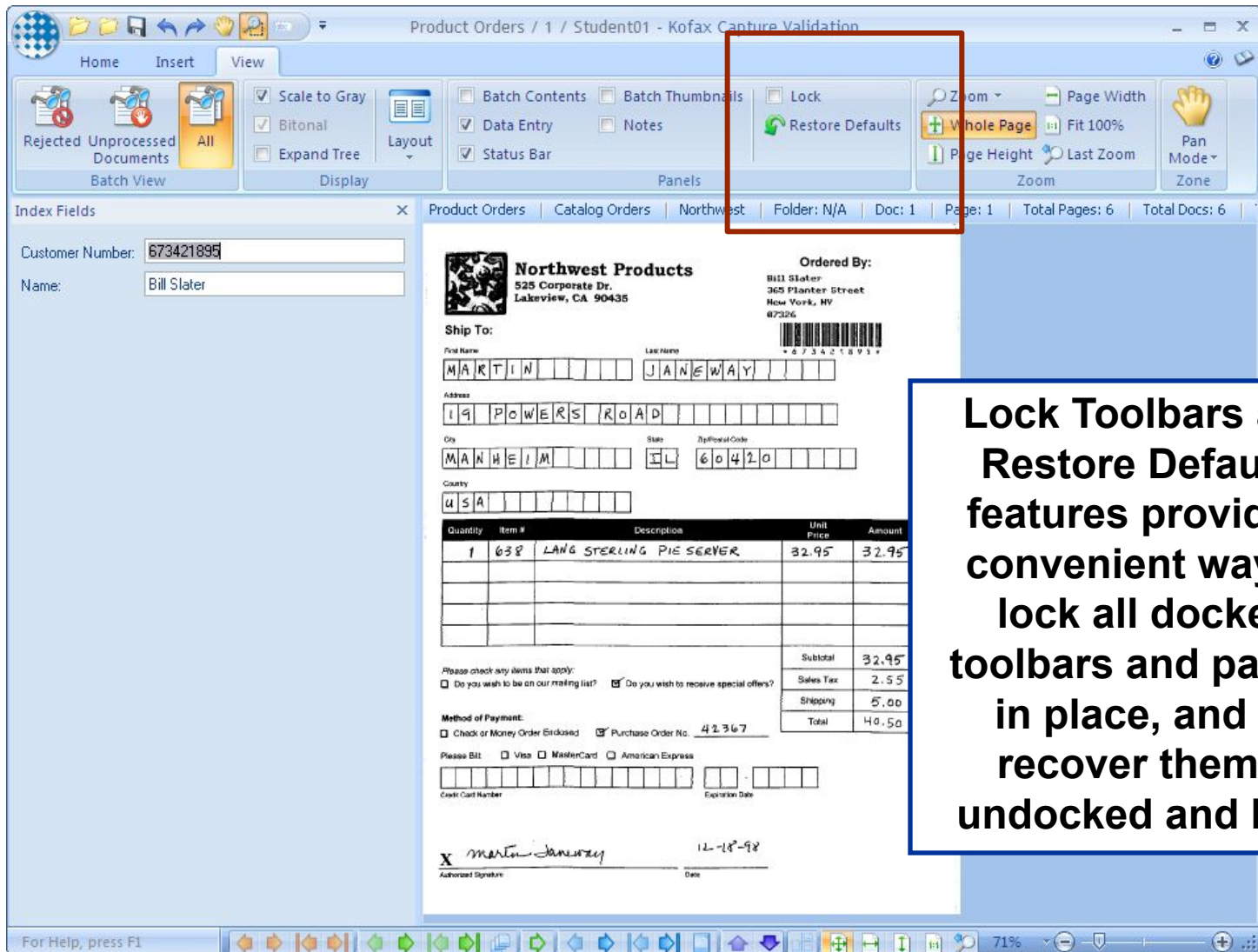
The 'Filter Batches' dialog box is open, showing the following criteria:
Priority: Equal to 1
Has error: Equal to False
Buttons at the bottom include: Add Criteria, Remove All, Enable filtering (checked), OK, Cancel, and Help.

A second callout box points to the dialog box with the text: "Select the criteria, and then apply the settings to filter the batches".

Display Options

The screenshot shows the Kofax Capture Validation interface. The 'View' tab is active, and the 'Layout' dropdown menu is open, displaying options: Box, 2 Rows, 3 Rows, 2 Columns, Split Bottom, and Split Side. A red box highlights the 'Batch Contents' window, which shows a list of documents (1: Northwest, 2: Northwest, 3: Northwest, 4: Northwest, 5: Northwest, 6: Northwest) and a preview of the first document. The preview shows a document with the text 'Ordered By: Bill Slater' (highlighted with a red box), '365 Planter Street', 'New York, NY', '07326', and a barcode with the number '* 6 7 3 4 2 1 8 9 5 *'. A blue box contains the text: 'From the View tab, a variety of settings are available to enhance the display of the documents and data in the batch, including the Batch Contents window'. The interface also includes a 'Batch View' section with 'Rejected Documents', 'Unprocessed Documents', and 'All' buttons, and a 'Display' section with 'Scale to Gray', 'Bitonal', and 'Expand Tree' options. The 'Panels' section includes 'Batch Contents', 'Batch Thumbnail', 'Lock', 'Restore Defaults', 'Zoom', 'Page Width', 'Page Height', 'Fit 100%', and 'Last Zoom'. The 'Zoom' section includes 'Zoom', 'Whole Page', 'Fit 100%', and 'Last Zoom'. The 'Pan Mode' section includes 'Pan Mode' and 'Zone'.

Lock Toolbars and Restore Defaults

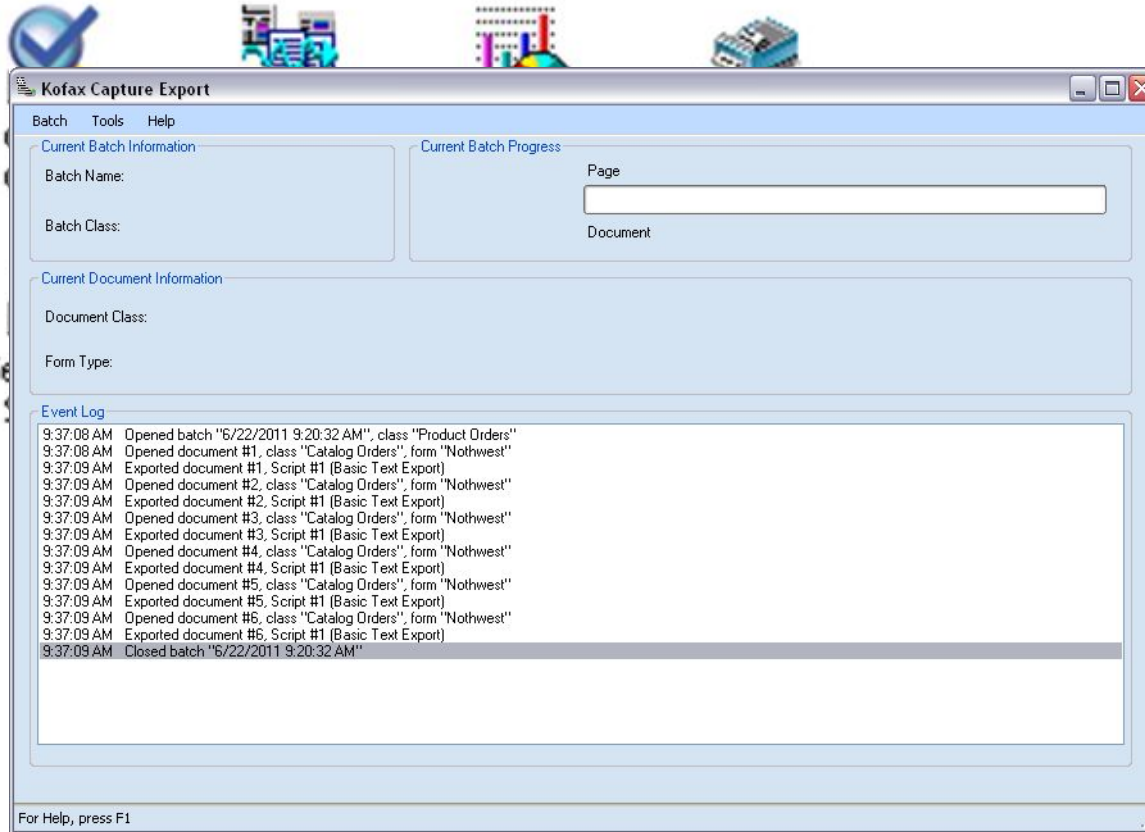


Lock Toolbars and Restore Defaults features provide a convenient way to lock all docked toolbars and panels in place, and to recover them if undocked and lost.

Run the Export Module

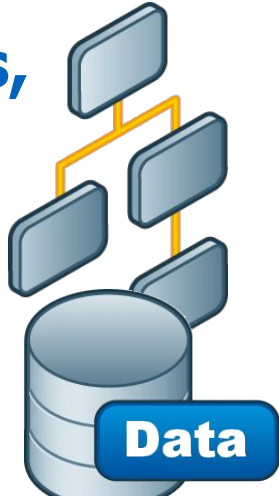
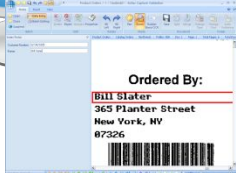
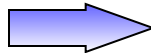
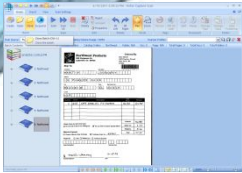
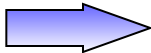
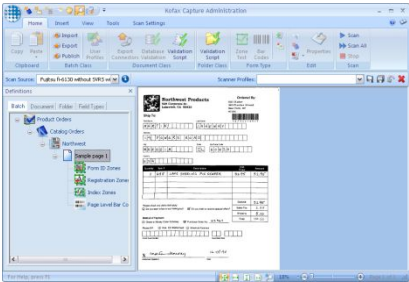


At the conclusion of the Validation operation, run the Export module to archive the data and the documents.



Demonstration

Field types, bar code setup, sample pages, setting up zones, using the Validation module, processing data



Lab

- Setting up field types
- Adding fields for data
- Adding and configuring sample pages
- Setting up zones
- Setting up page level bar codes
- Using the Validation module
- Processing data

Refer to the Kofax Capture 10 Lab and Reference Guide

