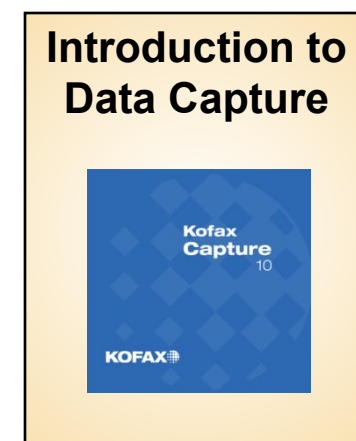


Module 6

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



Fields and Field Types

- A **Field** is a container for data. For example, the bar code circled on the right encodes data for the Customer Number field. The Customer Number field will hold the data.
- A **Field Type** is a SQL Data type template or profile. It sets the rules for what kind of data a field will accept.
- A field type is a required component of an index field.

Northwest Products

525 Corporate Dr.
Lakeview, CA 90435

Ordered By:

Bill Slater
365 Planter Street
New York, NY
87326

* 6 7 3 4 2 1 8 9 5 *

Ship To:

First Name

MARTIN

Last Name

JANEWAY

Address

19 POWERS ROAD

City

MANHEIM

State

IL

Zip/Postal Code

60420

Country

USA

Quantity	Item #	Description	Unit Price	Amount
1	638	LANG STERLING PIE SERVER	32.95	32.95
			Subtotal	32.95
			Sales Tax	2.55
			Shipping	5.00
			Total	40.50

Please check any items that apply:

☐ Do you wish to be on our mailing list? ☒ Do you wish to receive special offers?

Method of Payment:

☐ Check or Money Order Enclosed ☒ Purchase Order No. 42367

Please Bill: ☐ Visa ☐ MasterCard ☐ American Express

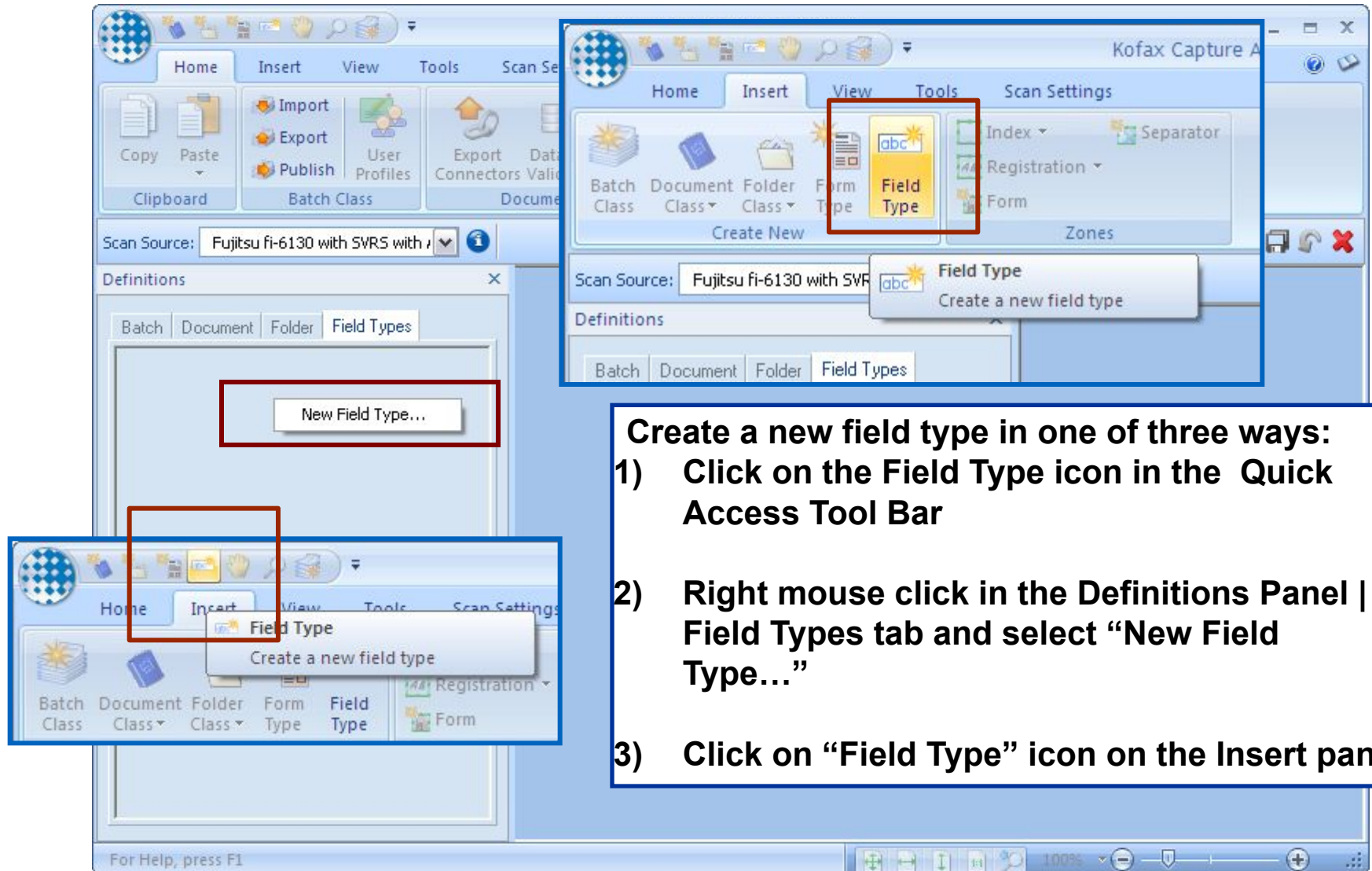
Credit Card Number

Expiration Date

X martin janeway

Authorized Signature

Create a Field Type



- 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

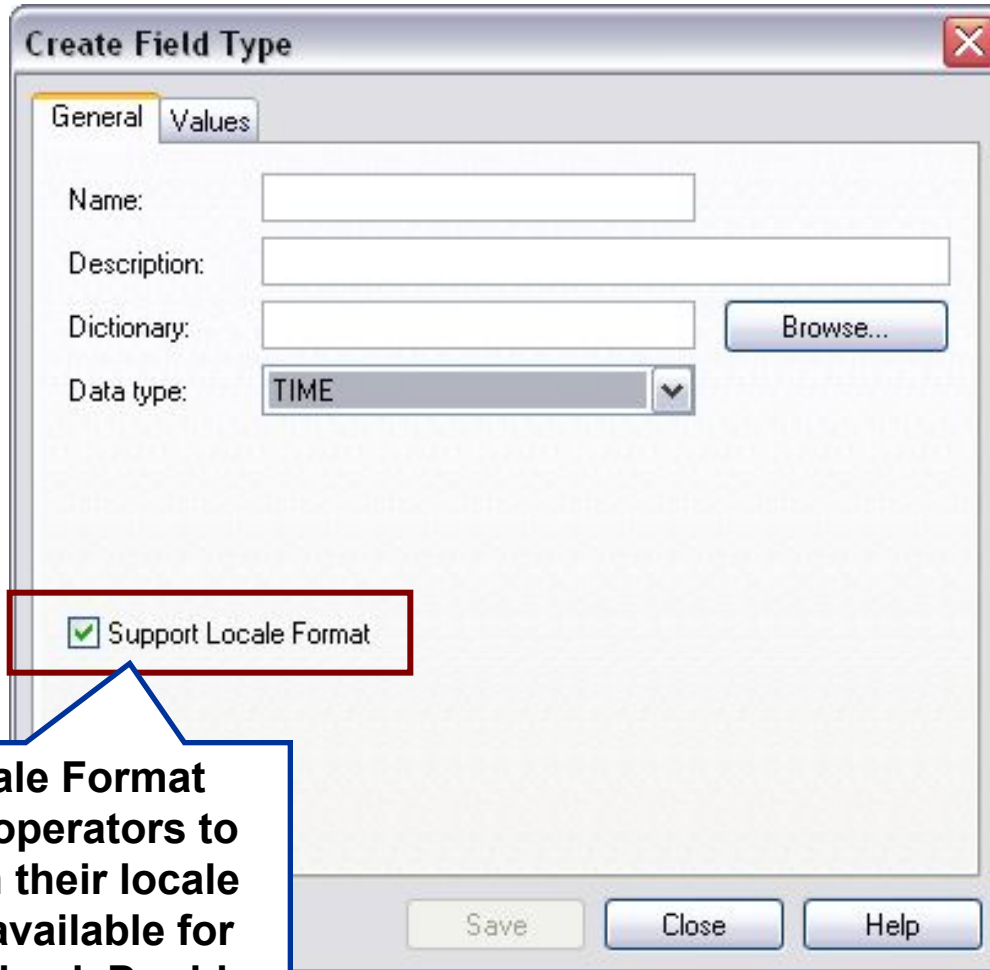
Field Type Properties

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

- Choose one of the 11 SQL data types:** Points to the 'Data type' dropdown menu, which currently shows 'VARCHAR'. A list of 11 data types is shown in a separate box: CHAR, DATE, DECIMAL, DOUBLE, FLOAT, INTEGER, NUMERIC, REAL, SMALLINT, TIME, and VARCHAR.
- Assign a Name:** Points to the 'Name' text field, which contains 'Alphanumeric10'.
- Assign an optional Description:** Points to the 'Description' text field.
- Subtypes are available for Email and Fax:** Points to the 'Subtype' dropdown menu, which shows 'Email Address' and 'Fax Number' as options.
- Assign maximum number of characters:** Points to the 'Number of characters' spinner box, which is set to '10'.
- Click [Save] the field type settings are complete:** Points to the 'Save' button, which is highlighted with a red rectangle.

Other visible elements include a 'Browse...' button next to the 'Description' field and 'Close' and 'Help' buttons at the bottom right.

Field Type Properties – Support Local Format



Create Field Type

General Values

Name:

Description:

Dictionary:

Data type: ▼

☒ Support Locale Format

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.

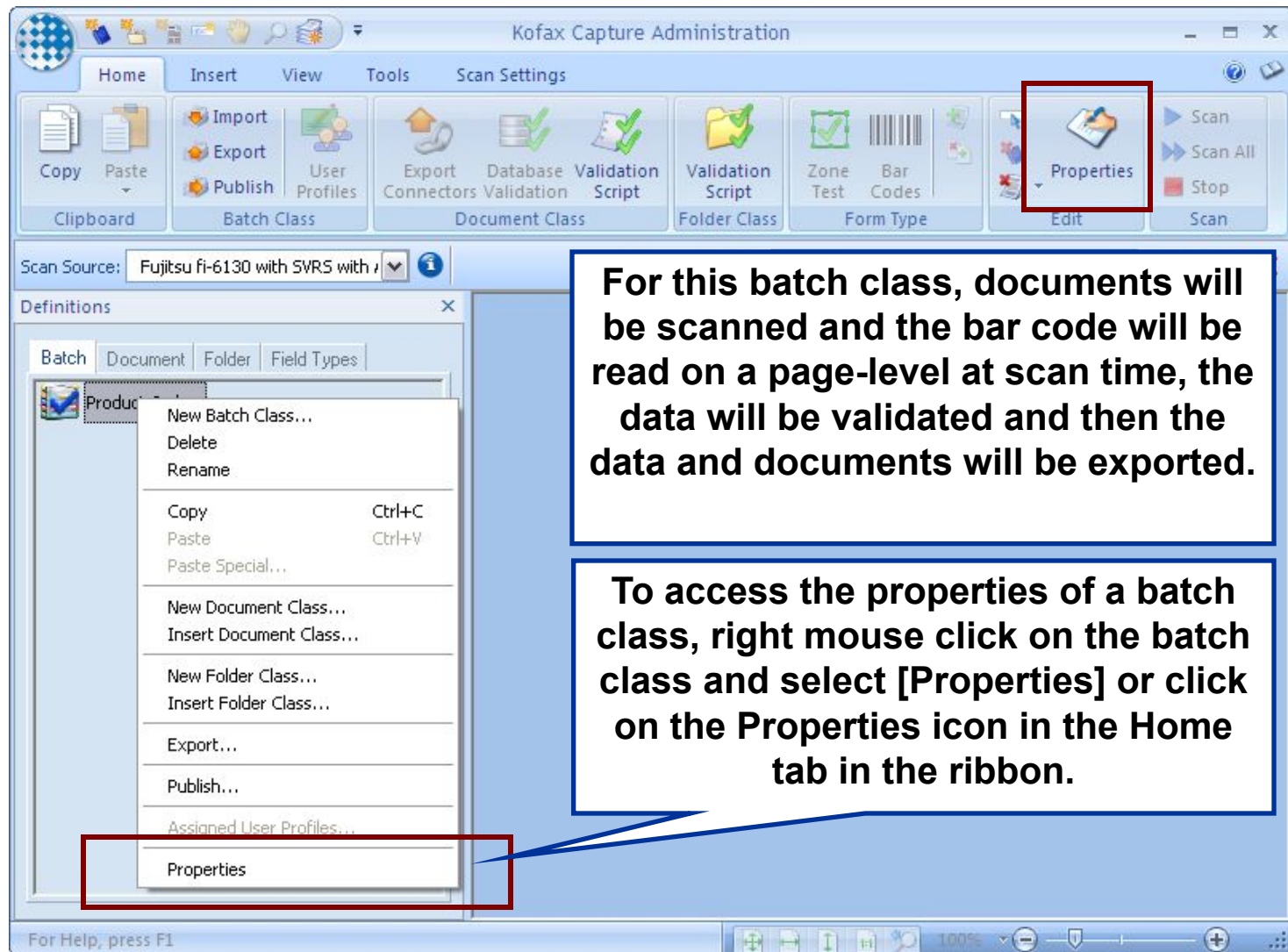
Field Types are Created and Available

The screenshot displays the Kofax software interface. At the top, there are tabs for 'Home', 'Insert', and 'View'. Below these, a 'Create New' section contains icons for 'Batch Class', 'Document Class', 'Folder Class', 'Form Type', and 'Field Type'. To the right, a 'Zones' section includes 'Index', 'Registration', and 'Form'. Below the 'Create New' section, a 'Scan Source' dropdown is set to 'Fujitsu fi-6130 with SVRS with /'. A 'Definitions' window is open, showing tabs for 'Batch', 'Document', 'Folder', and 'Field Types'. Under the 'Field Types' tab, a list shows 'Alphanumeric10' and 'Alphanumeric20'. The 'Alphanumeric20' entry is highlighted with a dashed border, and a blue arrow points from it to a text box at the bottom right.

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

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

Accessing the Batch Class Properties



Adding the Validation Module

The screenshot shows the 'Batch Class Properties' dialog box. The 'Queues' tab is selected and highlighted with a red box. In the 'Available Queues' list, 'Recognition Server', 'Verification', 'PDF Generator', 'OCR Full Text', and 'Quality Control' are listed. In the 'Selected Queues' list, 'Scan', 'Validation', and 'Export' are listed. The 'Properties' button is highlighted with a red box. A callout box points to the 'Properties' button with the text: 'Highlight Validation and select [Properties] to set the properties'. Another callout box points to the 'Validation Properties' dialog box with the text: '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.'. The 'Validation Properties' dialog box is open, showing the 'General' tab with the 'Allow batch editing' checkbox checked. The 'OK', 'Cancel', and 'Help' buttons are at the bottom.

Batch Class Properties

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

Available Queues:

- Recognition Server
- Verification
- PDF Generator
- OCR Full Text
- Quality Control

Add >>

<< Remove

Remove All

Properties

Selected Queues:

- Scan
- Validation**
- Export

Highlight Validation and select [Properties] to set the properties

Validation Properties

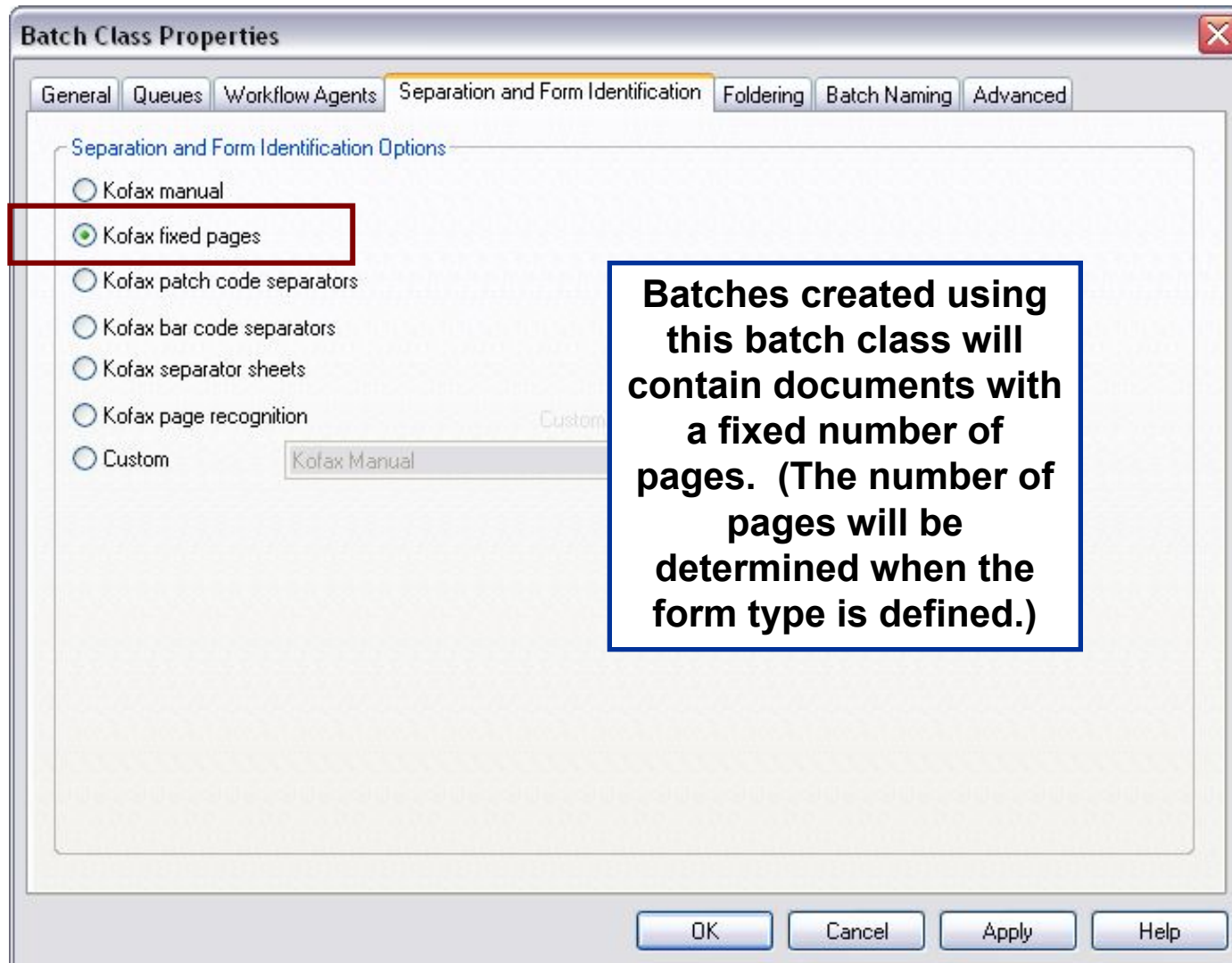
General

☒ Allow batch editing

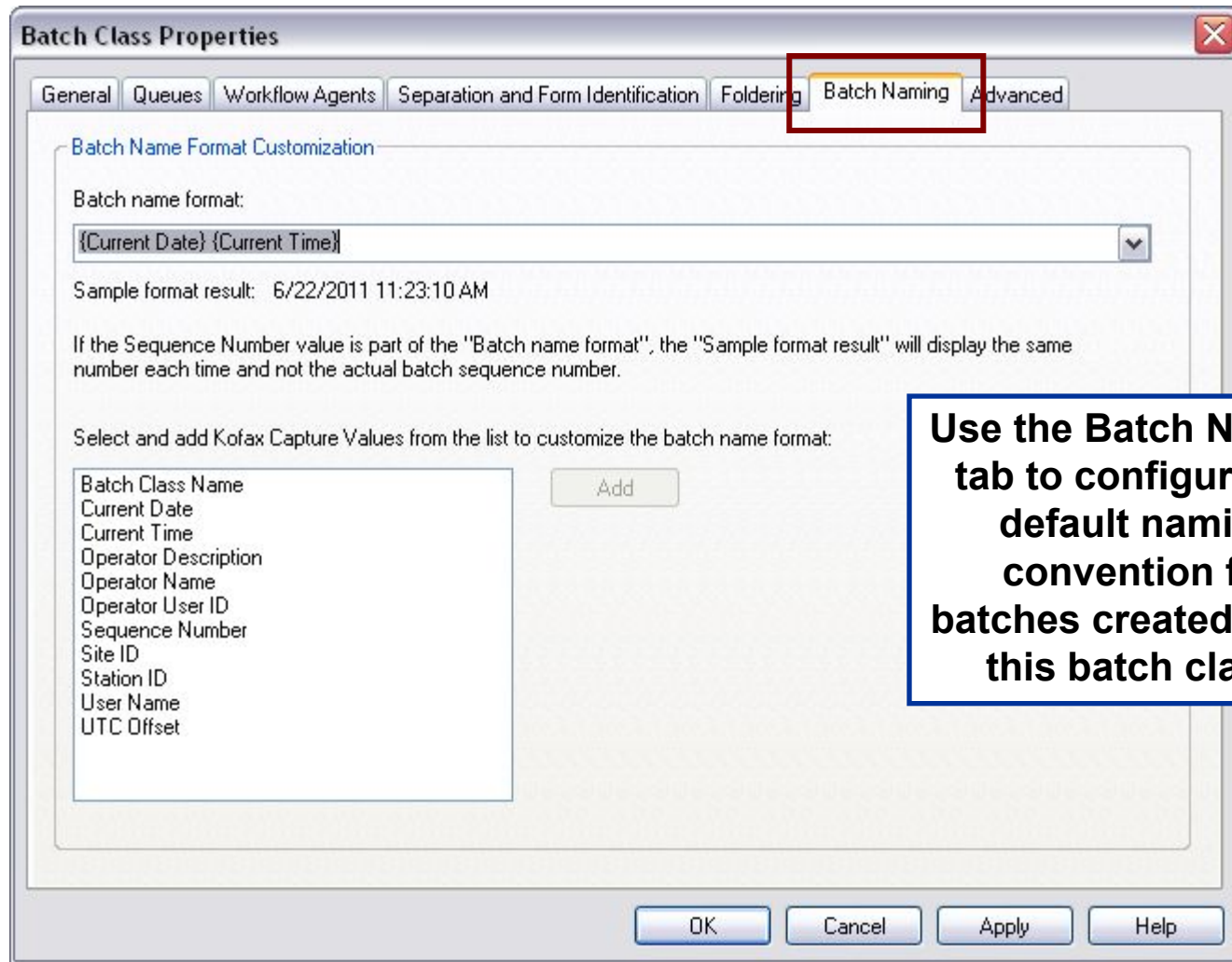
OK Cancel Help

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.

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

The screenshot shows the 'Batch Class Properties' dialog box with the 'Batch Naming' tab selected. The 'Batch Name Format Customization' section contains a 'Batch name format' dropdown menu showing '{Batch Class Name} / {Site ID} / {Station ID}'. Below this is a 'Sample format result' field showing 'Product Orders / 1 / Student01'. A text box explains that the sequence number in the sample result is part of the batch name format and not the actual batch sequence number. Below this is a list of 'Kofax Capture Values' to be added to the format, including 'Batch Class Name', 'Current Date', 'Current Time', 'Operator Description', 'Operator Name', 'Operator User ID', 'Sequence Number', 'Site ID', and 'Station ID'. An 'Add' button is next to the list. At the bottom are 'OK', 'Cancel', 'Apply', and 'Help' buttons.

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 result" will reflect the sequence number each time and not the actual batch sequence number.

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

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

Add

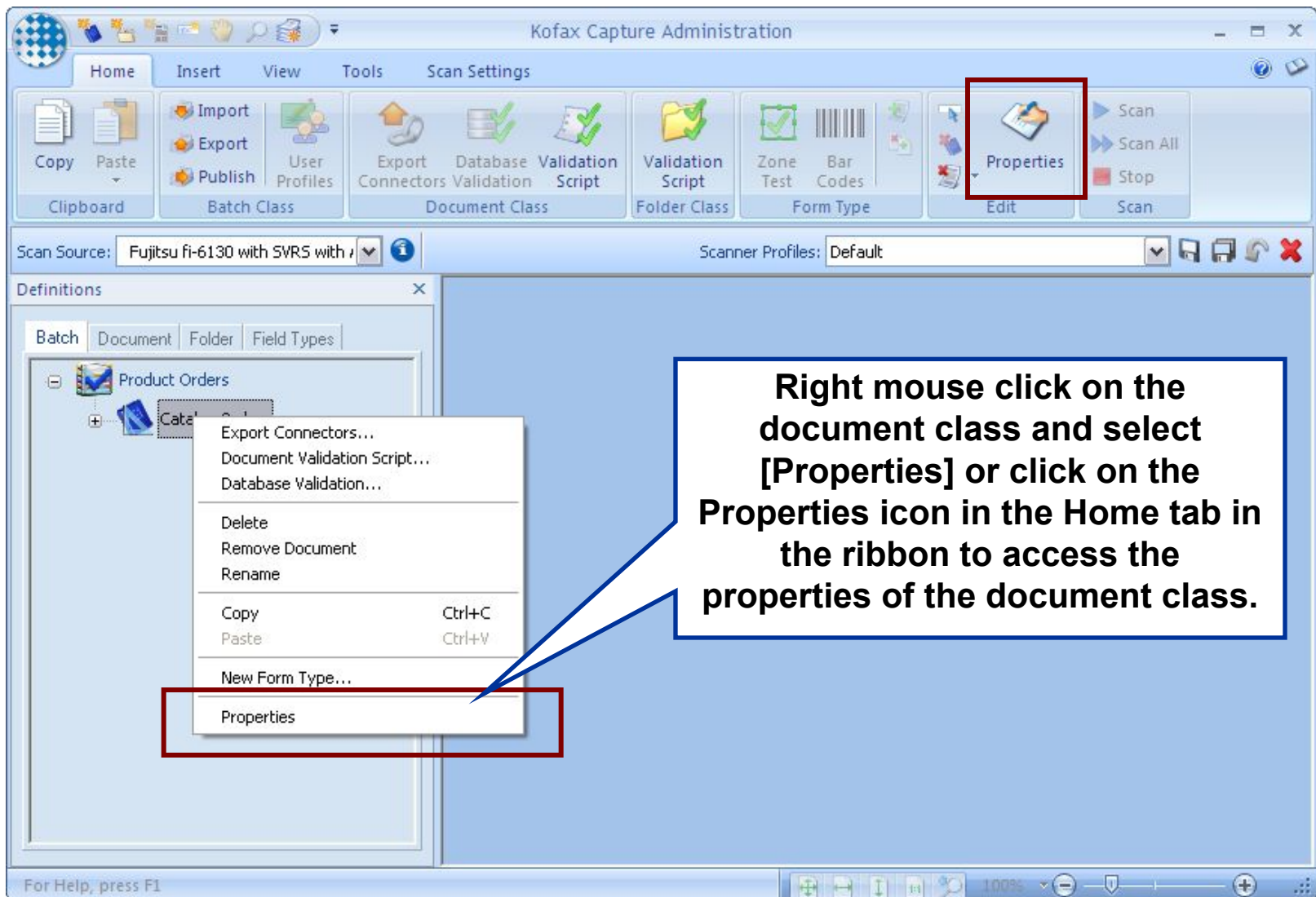
OK Cancel Apply Help

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

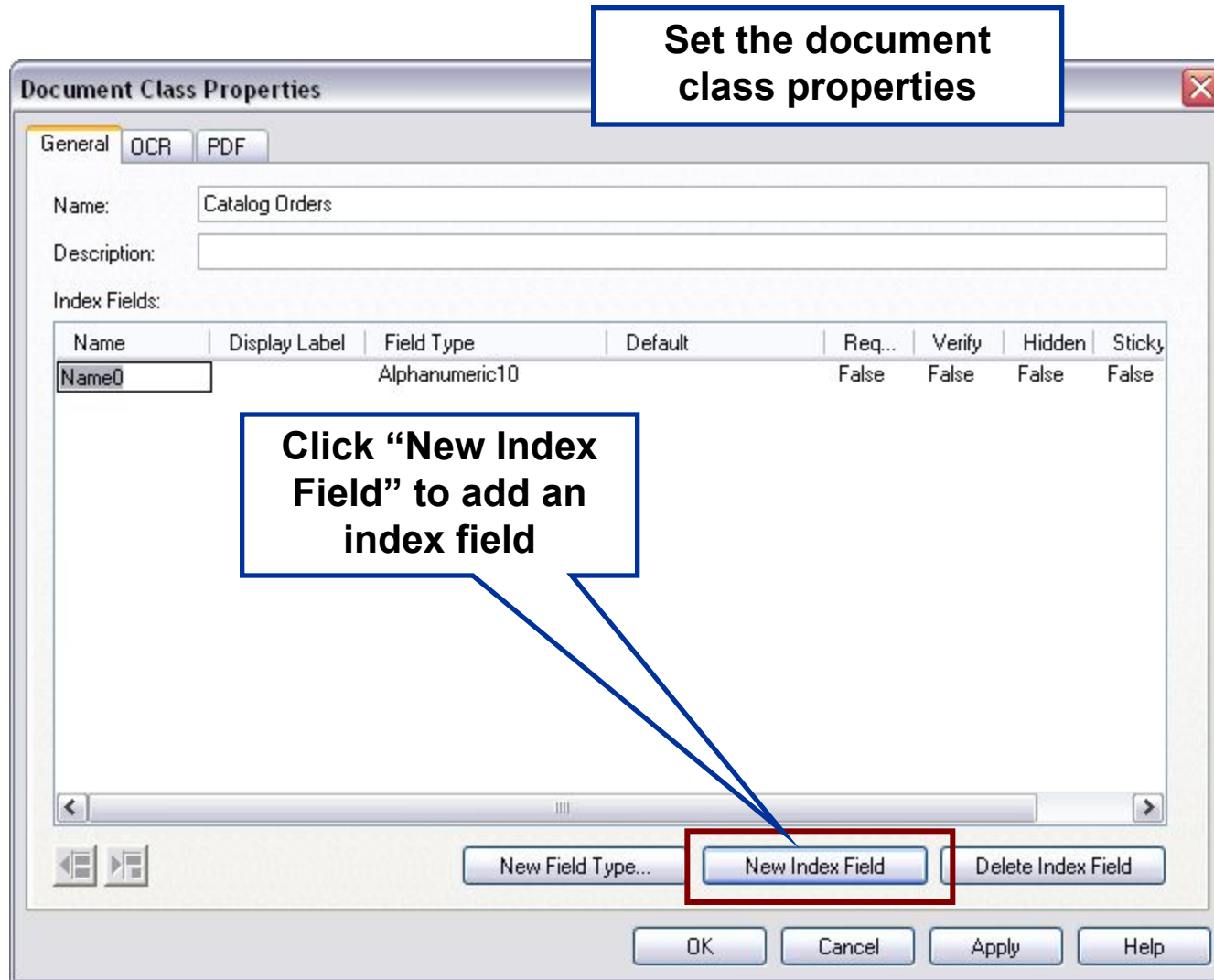
A sample format of the batch name is created reflecting the selected values.

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

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 field: '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 'OK', 'Cancel', 'Apply', and 'Help' buttons are at the bottom.

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 windows from a software application. The 'Document Class Properties' window is in the background, with the 'OCR' tab selected. It has a 'Name' field containing 'Catalog Orders' and an 'Index Fields' table. The 'Create Field Type' window is in the foreground, with the 'General' tab selected. It has a 'Name' field containing 'State', a 'Data type' dropdown set to 'VARCHAR', and a 'Number of characters' spinner set to '2'. The 'Subtype' dropdown is set to '(None)'. Callouts point to the 'New Field Type...' button in the 'Document Class Properties' window, the 'OK' button in the 'Create Field Type' window, and the 'New Field Type...' button in the 'Document Class Properties' window.

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

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

The screenshot shows the 'Kofax Capture Export Connector - Text Setup' window. The 'Index Storage' tab is selected. The 'Batch class' is 'Product Orders' and the 'Document class' is 'Catalog Orders'. The 'Name' is 'Basic Text Export'. The 'Storage folder' is 'C:\Export\Lab05' and the 'File name' is 'data.txt'. The 'Encoding' is 'ANSI'. The 'Values' section has a table with one row: Sequence 1, Value Customer Number. A fly-out menu is open for 'Document Index Fields' with options: Customer Number, Name, Kofax Capture Values, Export Location, and Text Constant. The 'Add' button is highlighted in red. The 'OK' button is also highlighted in red. Callouts provide instructions: '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.', and 'Click [OK] when all index fields have been added'.

Kofax Capture Export Connector - Text Setup

Batch class: Product Orders
Document class: Catalog Orders
Name: Basic Text Export

Default Storage Index Storage Advanced

☒ Output one index file per document to the default storage folder
☒ Output values to specific index file

Storage folder: C:\Export\Lab05 Custom...
File name: data.txt
Encoding: ANSI

Values

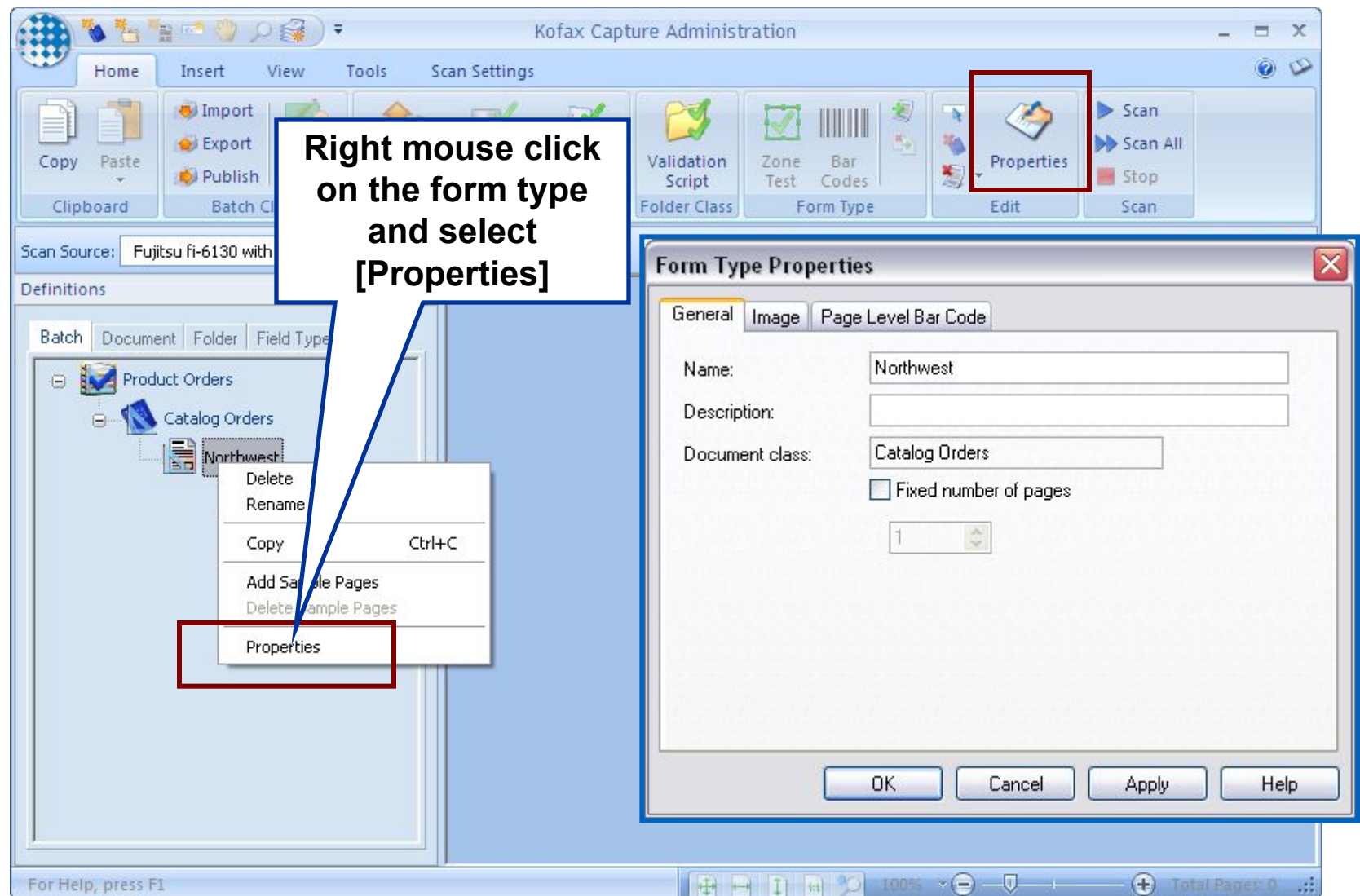
Sequence	Value
1	Customer Number

Buttons: Add, Delete, Delete All, Move

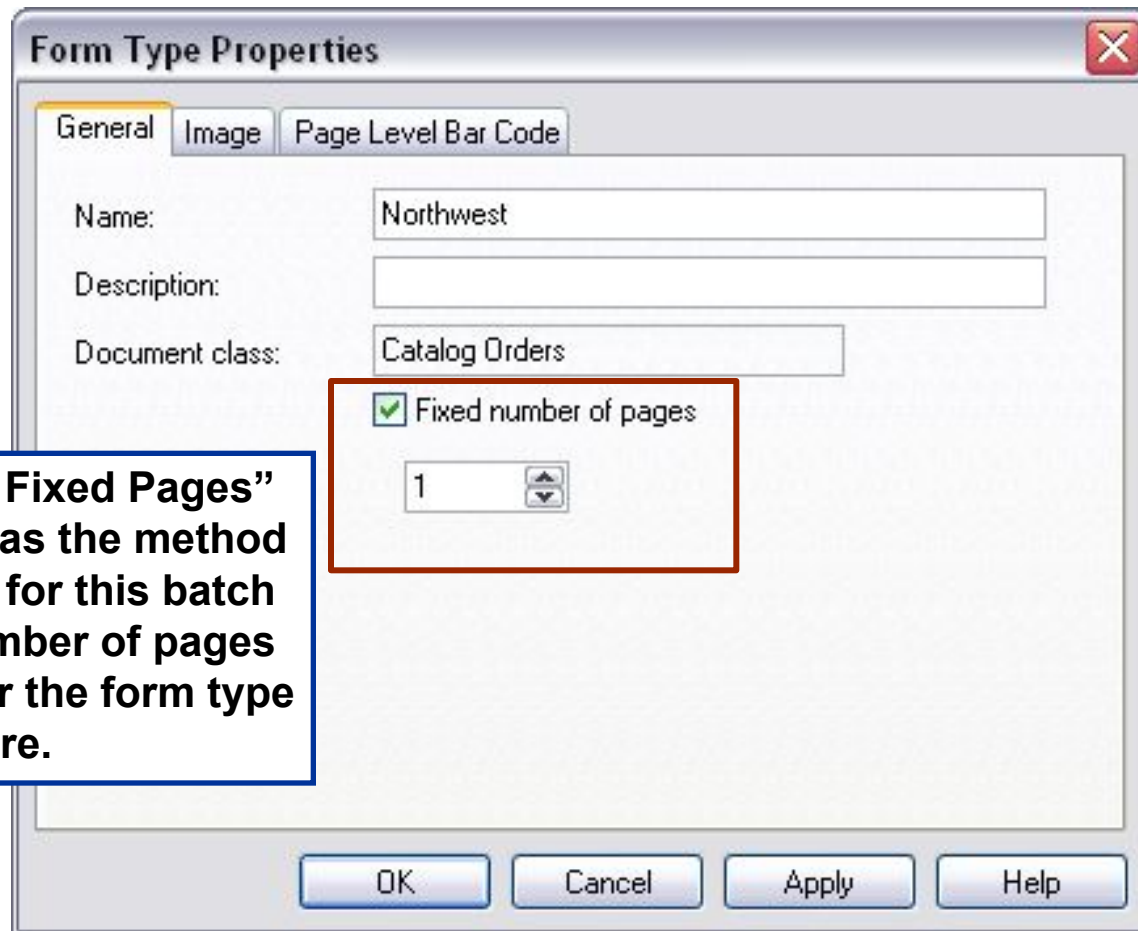
Callouts:

- 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



Setting Fixed Number of Pages



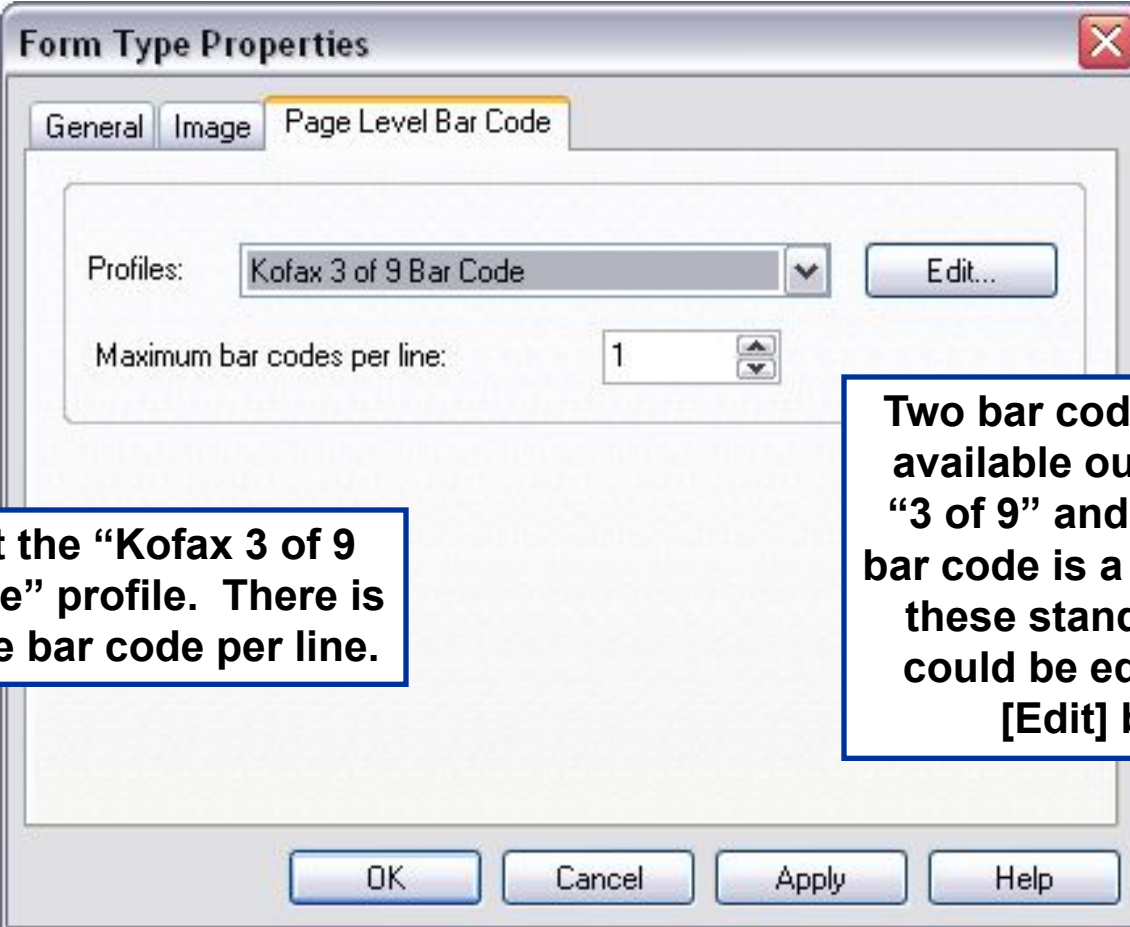
The image shows a 'Form Type Properties' dialog box with three tabs: 'General', 'Image', and 'Page Level Bar Code'. The 'General' tab is selected. It contains the following fields:

- Name: Northwest
- Description: (empty)
- Document class: Catalog Orders
- ☒ Fixed number of pages
- 1 (with up/down arrows)

At the bottom are buttons for OK, Cancel, Apply, and Help. A red rectangle highlights the 'Fixed number of pages' checkbox and the page number field.

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 image shows a Windows-style dialog box titled "Form Type Properties". It has three tabs: "General", "Image", and "Page Level Bar Code", with the last tab being selected. 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 label "Maximum bar codes per line:" followed by a text box containing the number "1" and a small up/down arrow control. 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).

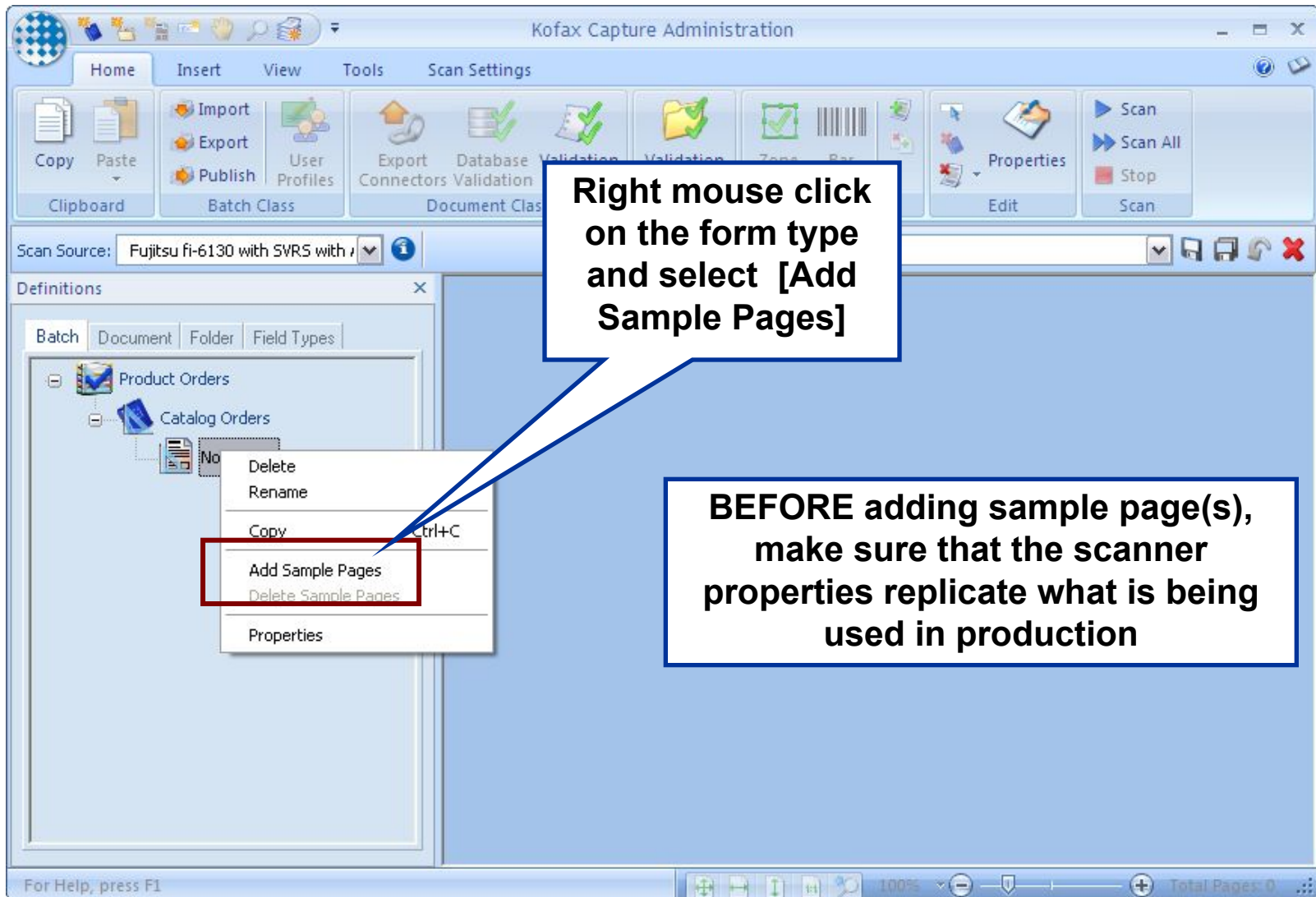
Sample Pages

- 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.

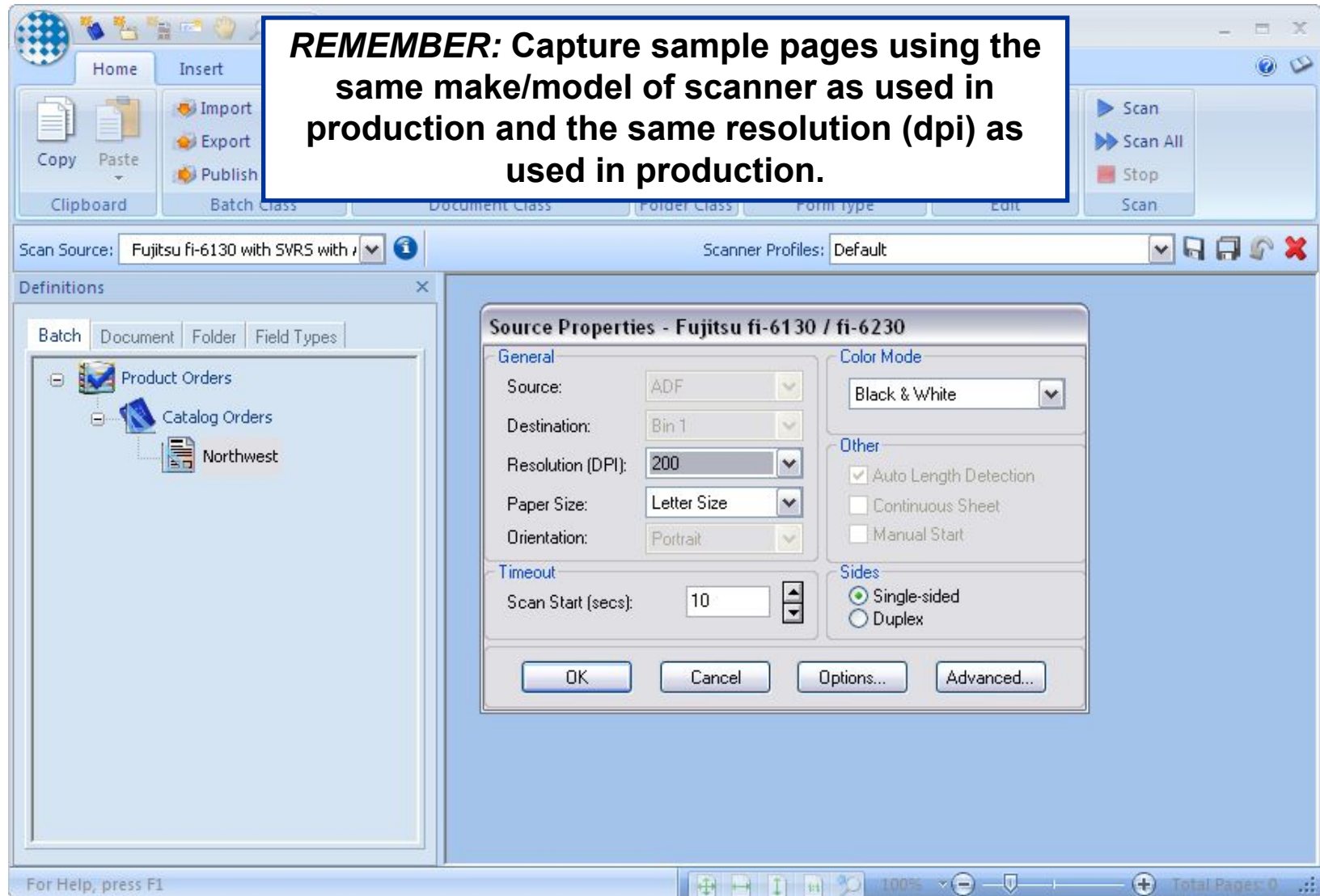
Requirements and Guidelines for Sample Pages

- 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



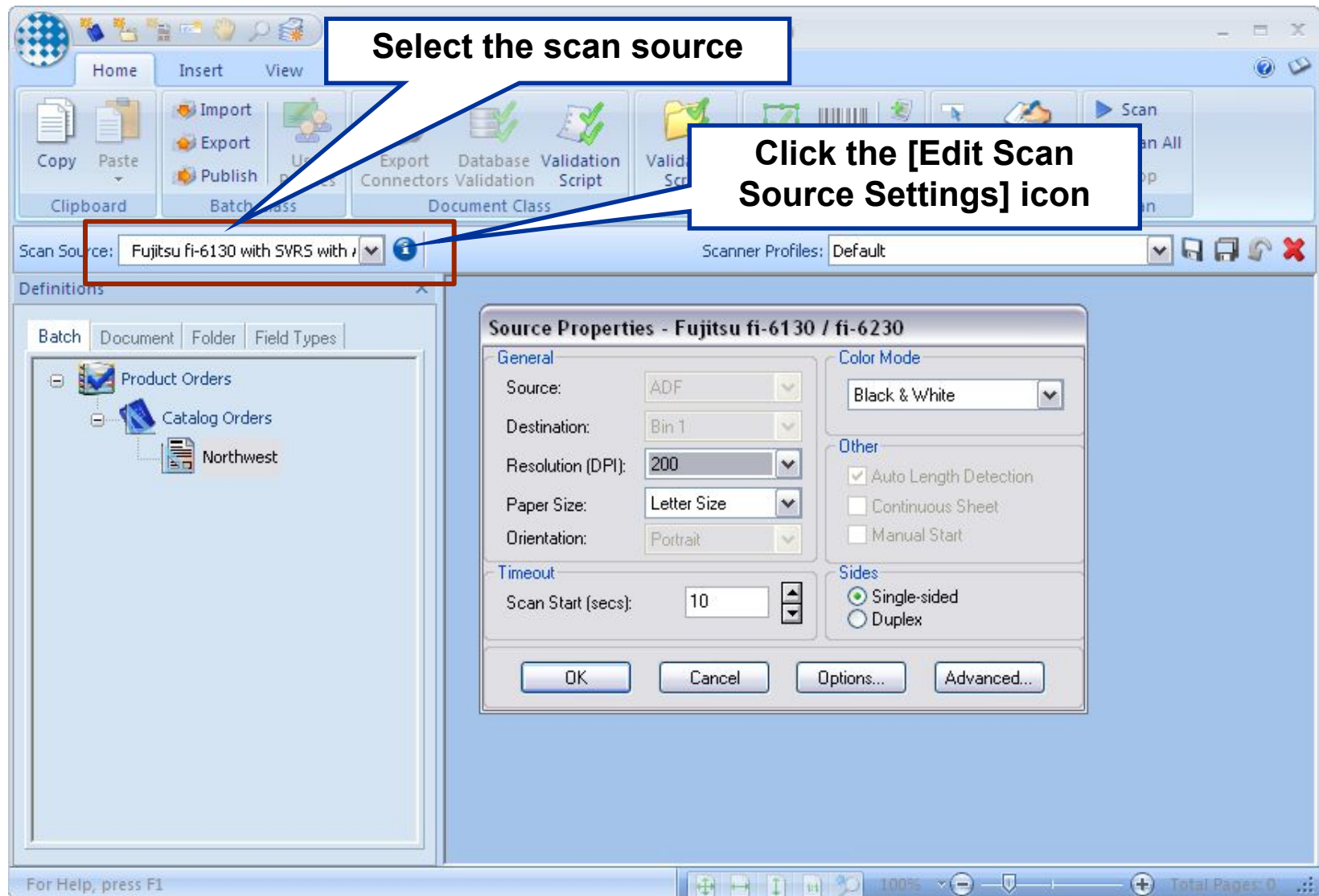
Set Scanner Properties to Match Production



Scanner Properties and Profiles

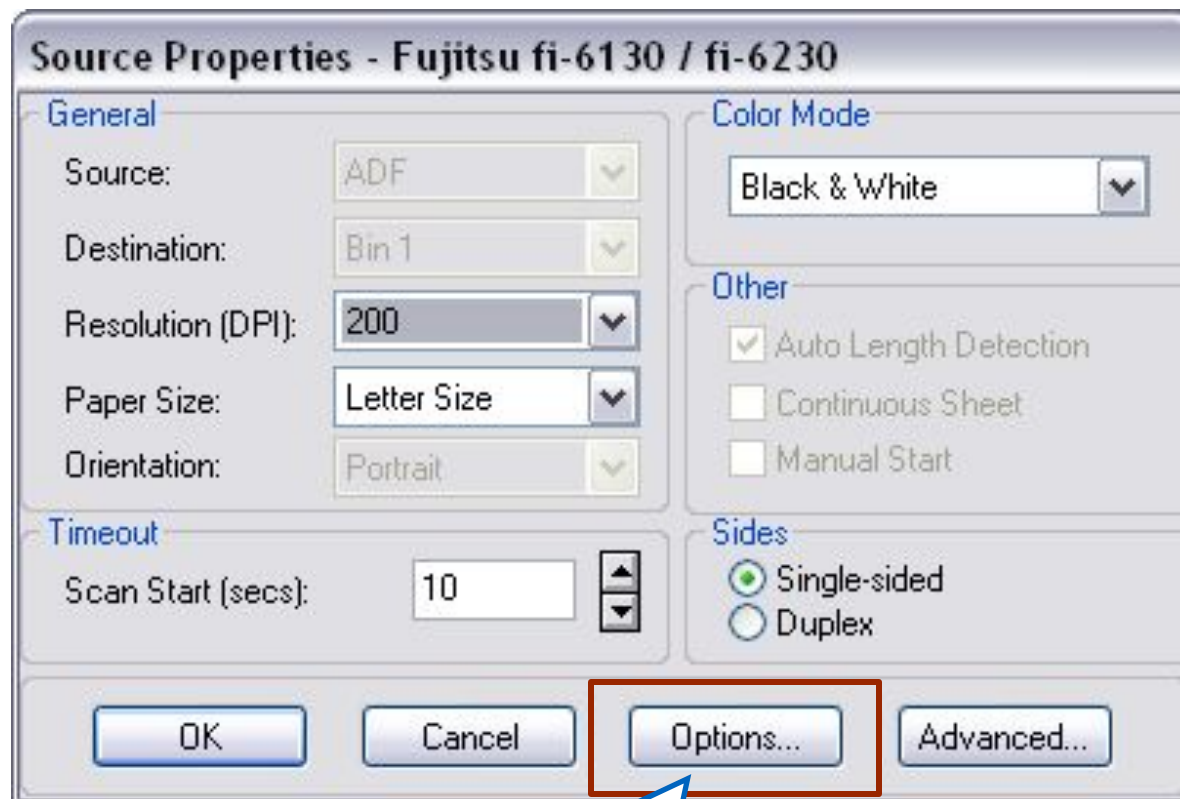
- Source Properties provide parameters for continued use after being setup once
 - Scan resolution (examples: 100, 200, 300 dots per inch [dpi])
 - Paper size (examples: legal, letter, A4)
 - Blank Page Thresholds
 - Color modes (color or black-and-white scanning)
 - Orientation (landscape versus portrait)
 - 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



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 dialog box is titled "Source Properties" and is divided into several sections for configuring scanner settings. It includes options for enabling picking rectangles, selecting units (English in inches or Pixels), setting dimensions (Top, Left, Width, Height), choosing rotation angles (0, 90, 180, 270 degrees), and setting delete blank page thresholds in bytes. At the bottom, there are options for prescan cache and page timeout, along with OK and Cancel buttons.

Section	Option	Value
Front Picking Rectangle	Enabled	<input type="checkbox"/>
	English (in)	<input checked="" type="radio"/>
	Pixels	<input type="radio"/>
	Top	0.00
	Left	0.00
Back Picking Rectangle	Enabled	<input type="checkbox"/>
	English (in)	<input checked="" type="radio"/>
	Pixels	<input type="radio"/>
	Top	0.00
Front Rotation	0	<input checked="" type="radio"/>
	90	<input type="radio"/>
	180	<input type="radio"/>
	270	<input type="radio"/>
Back Rotation	0	<input checked="" type="radio"/>
	90	<input type="radio"/>
	180	<input type="radio"/>
	270	<input type="radio"/>
Front Delete Blank Page Threshold	Threshold (bytes):	0
	Threshold (bytes):	0
Options	Prescan (cache):	1
	Page Timeout (secs):	15

Advanced Properties

Source Properties - Fujitsu fi-6130 / fi-6230

General

Source: ADF

Destination: Bin 1

Resolution (DPI): 200

Paper Size: Letter Size

Orientation: Portrait

Color Mode

Black & White

Other

☒ Auto Length Detection

☐ Continuous Sheet

☐ Manual Start

Timeout

Scan Start (secs): 10

Sides

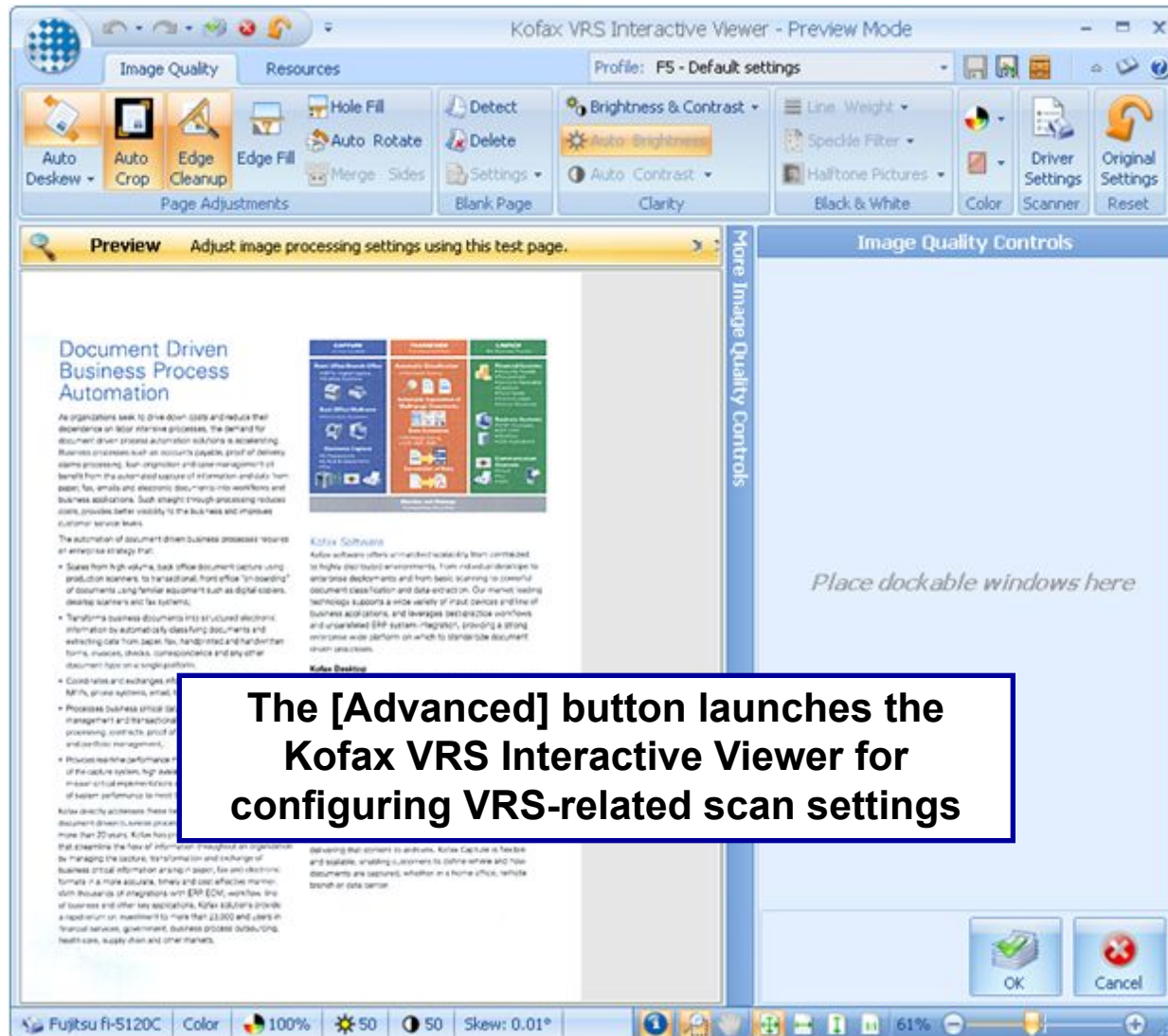
☒ Single-sided

☐ Duplex

OK Cancel Options... **Advanced...**

**Select [Advanced] to review
or define additional scanner
properties**

Advanced Options – the VRS Interactive Viewer



Save Scan Settings as a Scanner Profile

The screenshot displays the Kofax software interface with a 'Save Scanner Profile' dialog box open. The dialog box has a 'Source' field set to 'Fujitsu fi-6130 with SVRS with AIPE' and a list of profiles including 'Product Orders' and 'Default'. The 'Default' profile is selected. The dialog box has 'OK', 'Cancel', and 'Help' buttons. A callout points to the 'Default' profile with the text 'Give a name to the scanner profile'. Another callout points to the 'OK' button with the text 'Click [OK] to save the profile'. A third callout points to the 'Save' icon in the top right of the main window with the text 'Click on [Save] to launch the "Save Scanner Profile" window'. A fourth callout points to the top of the main window with the text 'A scanner profile saves all the properties set-up for the scanner'. The main window shows a 'Scan Source' dropdown set to 'Fujitsu fi-6130 with SVRS with AIPE' and a 'Definitions' pane on the left with a tree view showing 'Product Orders', 'Catalog Orders', and 'Northwest'. The status bar at the bottom indicates 'For Help, press F1' and 'Total Pages: 0'.

A scanner profile saves all the properties set-up for the scanner

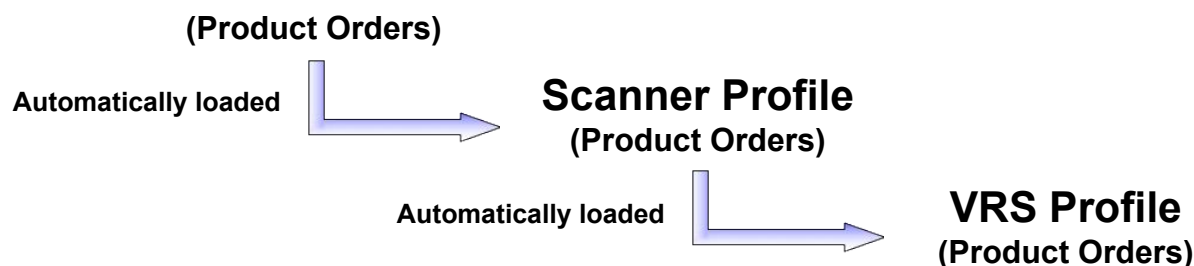
Click on [Save] to launch the "Save Scanner Profile" window

Click [OK] to save the profile

Give a name to the scanner profile

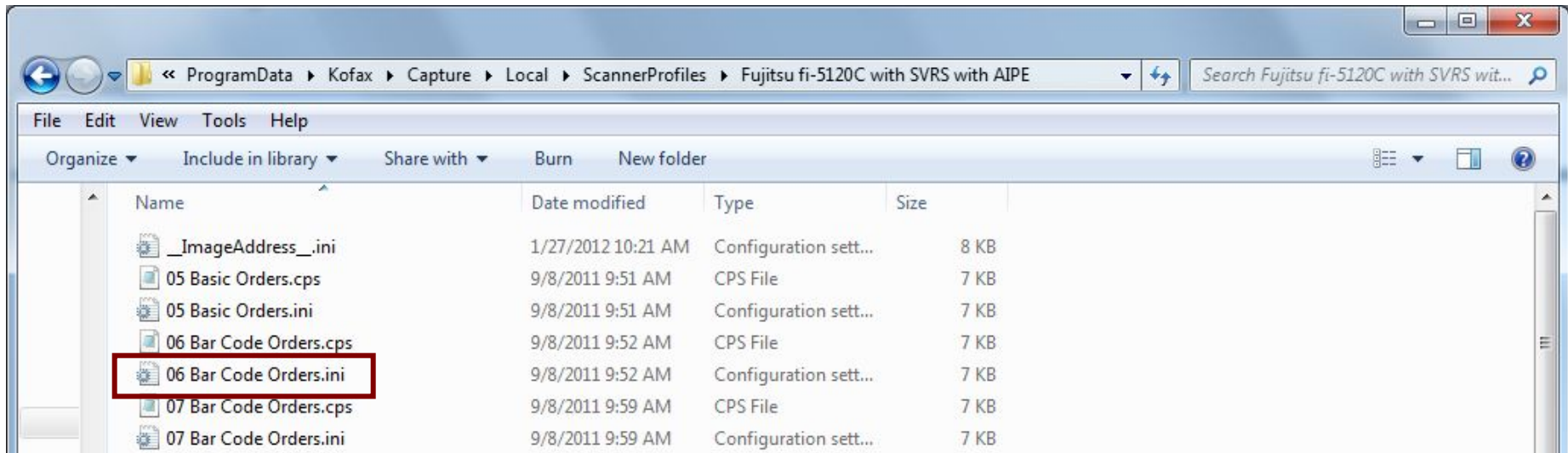
Naming and Loading Scanner Profiles

- 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 batch class.



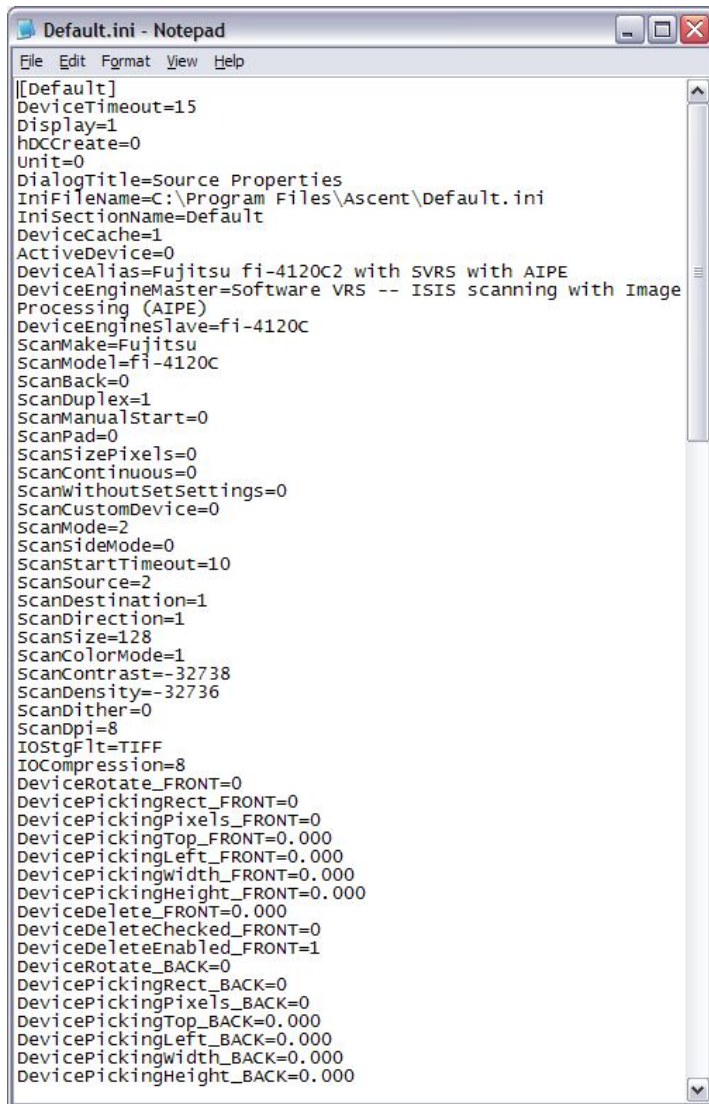
Saved Scanner Profile Source Files

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

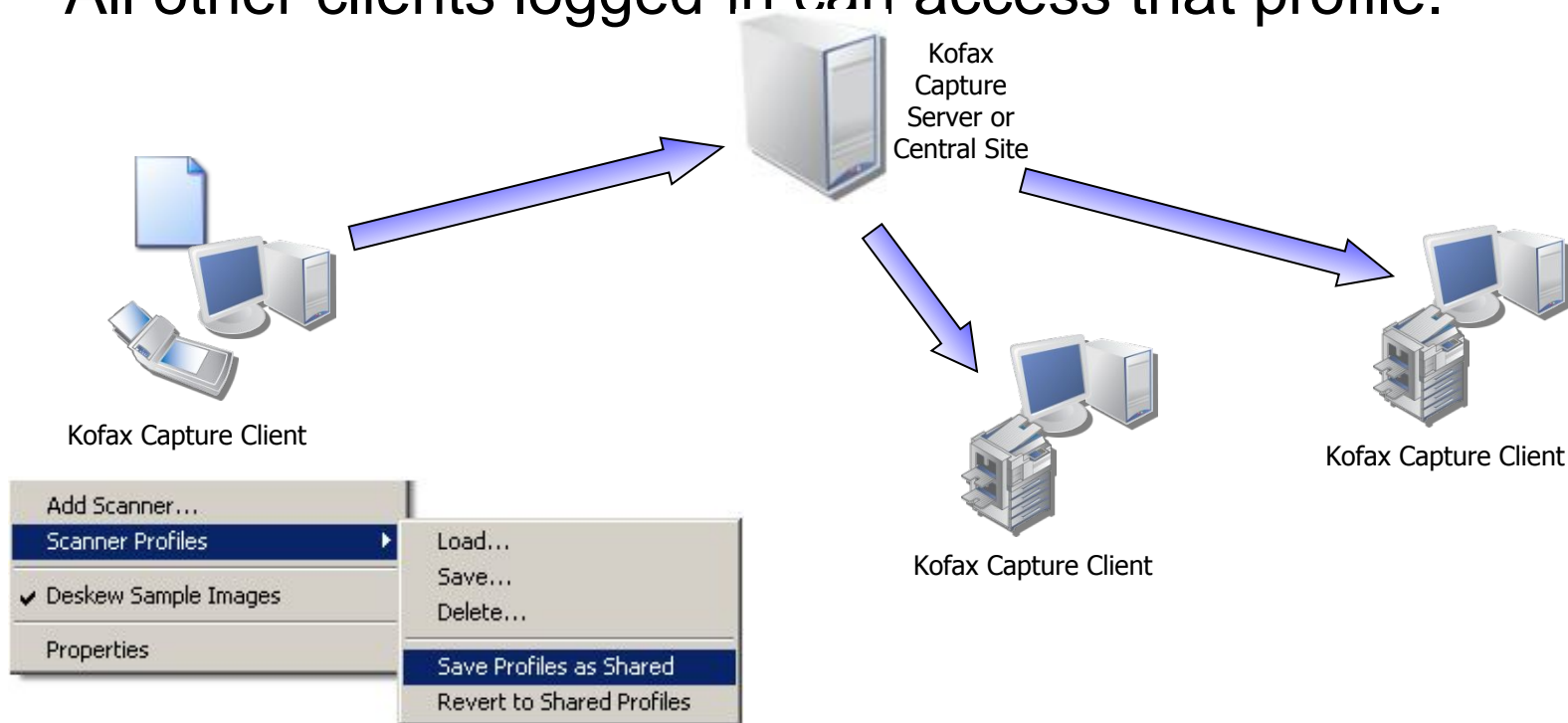
Opening the scanner profiles in a test editor (Notepad) will display all the scan settings



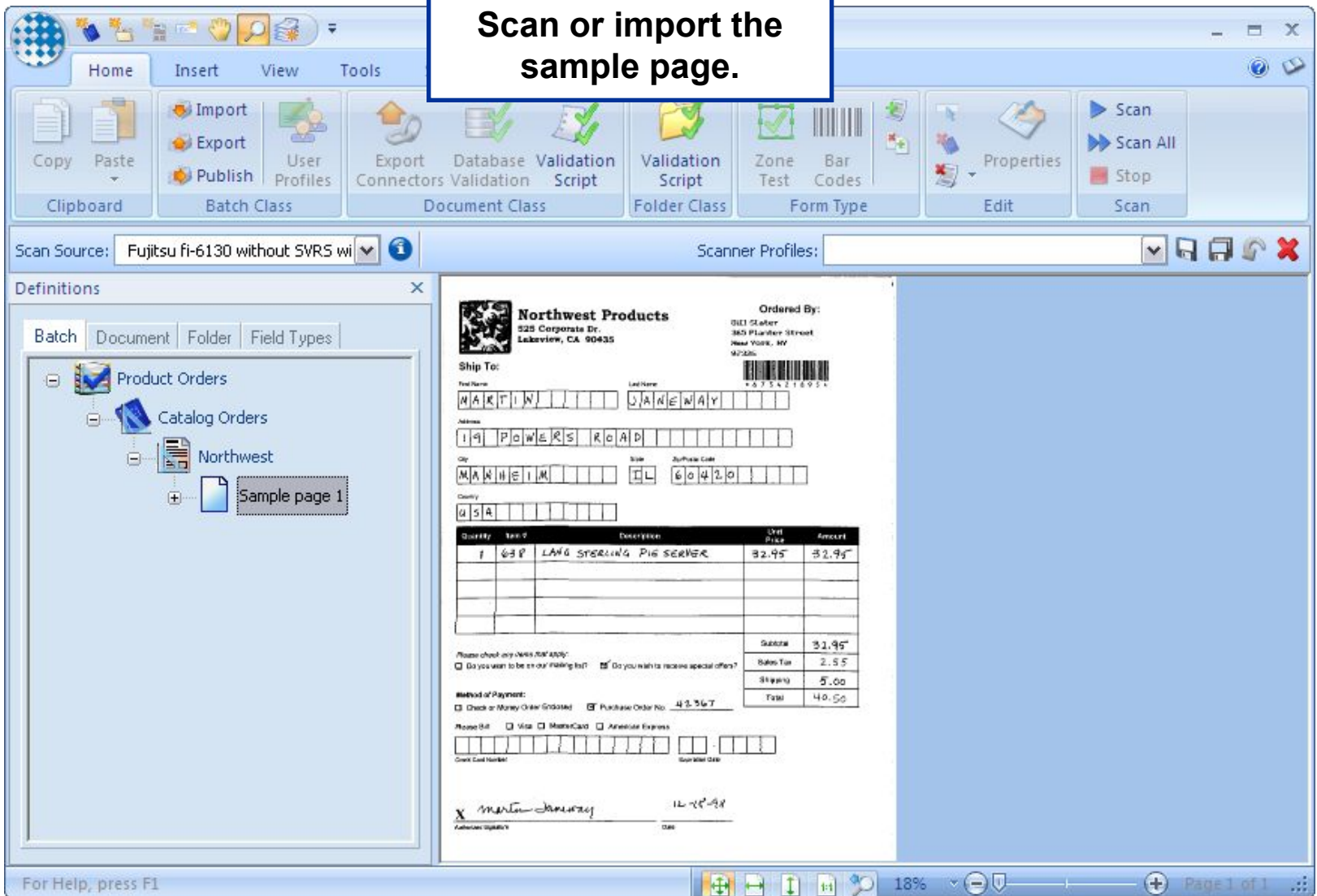
```
Default.ini - Notepad
File Edit Format View Help
[Default]
DeviceTimeout=15
Display=1
hDCCreate=0
Unit=0
DialogTitle=Source Properties
IniFileName=C:\Program Files\Ascent\Default.ini
IniSectionName=Default
DeviceCache=1
ActiveDevice=0
DeviceAlias=Fujitsu fi-4120C2 with SVRS with AIPE
DeviceEngineMaster=Software 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.



Capture the Sample Page



The Sample Page is Ready for Setup

The screenshot shows the Kofax Capture Administration interface. The 'Definitions' pane on the left is expanded, showing a tree structure: 'Batch' > 'Document' > 'Folder' > 'Field Types'. Under 'Field Types', 'Northwest' is expanded, and 'Sample page 1' is highlighted. Below 'Sample page 1', there are icons for 'Form ID Zones', 'Registration Zones', 'Index Zones', and 'Page Level Bar Co'. A red box highlights the 'Sample page 1' icon. A blue callout box points to the icon with the text: 'A sample page icon is attached to the form type. When expanded, place holders for zones are visible.' The main window displays a sample form titled 'Northwest Products' with fields for 'Ship To', 'Order By', and 'Payment'.

Kofax Capture Administration

Home Insert View Tools Scan Settings

Clipboard Batch Class Document Class Folder Class Form Type Edit Scan

Scan Source: Fujitsu fi-6130 without SVRS wi Scanner Profiles:

Definitions

Batch Document Folder Field Types

Product Orders

Catalog Orders

Northwest

Sample page 1

Form ID Zones

Registration Zones

Index Zones

Page Level Bar Co

Northwest Products

Ordered By:

Ship To:

Form ID Zones

Registration Zones

Index Zones

Page Level Bar Co

A sample page icon is attached to the form type. When expanded, place holders for zones are visible.

For Help, press F1

18% 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].

Page Level Bar Code Properties

General

Available Fields

- (skip bar code)
- Name

Selected Fields (in order)

- Customer Number

Buttons: Add >>, << Remove, Remove All, OK, Cancel, Apply, Help

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' menu is open, and the 'Zoom' option is highlighted. The main window displays a scanned document with various fields and zones defined. The document is a form for Northwest Products, including a header, a table of items, and a footer with a signature.

Quantity	Unit	Description	Unit Price	Amount
1	each	LANA STERLING PIR SERVER	32.95	32.95
Subtotal			32.95	
Sales Tax			2.55	
Shipping			5.00	
Total			40.50	

For Help, press F1

Choose the Index Zone Icon

The screenshot shows the Kofax Capture Administration window. The 'Insert' tab is active, and the 'Index' icon is highlighted with a red box. A blue arrow points from a text box to this icon. The text box contains the instruction: "Select the 'Index Zone' icon from the Insert tab". Below the 'Index' icon, a tooltip displays the text "Index" and "Create index zones". In the left-hand pane, under the 'Definitions' section, the 'Index Zones' option is selected. The main window displays a scanned 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 document, there is a row of seven boxes, with the first two containing the letters "A" and "Y".

Select the "Index Zone" icon from the Insert tab

Draw the Zone and Configure the Properties

The screenshot displays the Kofax Capture application interface. On the left, the 'Definitions' pane shows a tree structure with 'Sample page 1' selected. The main window shows a scanned document with the text 'Bill Slater' and '365 Planter Street'. A 'Create Index Zone' dialog box is open, showing the 'General' tab. The 'Associated field:' dropdown menu is set to 'Customer Number'. The 'Auto recognition' checkbox is unchecked. The 'Recognition profile' is set to 'Kofax High Performance OCR Zone'. The 'OK' button is highlighted.

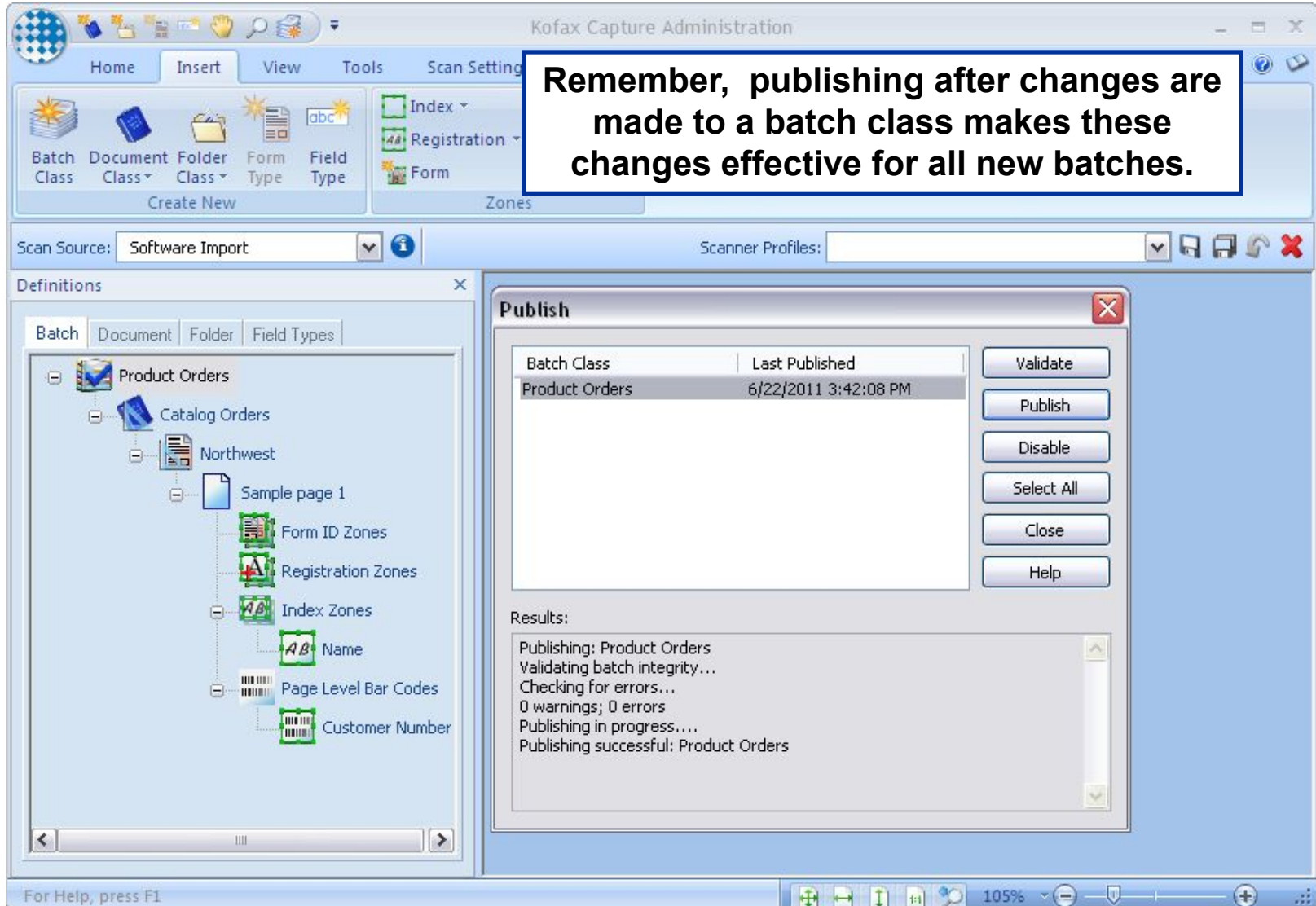
With the left mouse button depressed, draw a box around the element.

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.

Publish

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

The screenshot displays the Kofax Capture Scan application window. The top menu bar includes 'Administration', 'Batch', 'Export', 'License Utility', and 'OCR Full Text'. The 'Batch' module is active, showing a toolbar with icons for 'Create', 'Scan', 'Delete', 'Rotate', 'Mode', 'Page', 'Document', and 'Folder'. The 'Batch Contents' pane on the left lists five items, all labeled '1: Northwest'. The main window shows a document titled 'Northwest Products' with a barcode and shipping information. A callout box points to the first item in the list, stating: 'Because Fixed Pages was selected as the separation method, documents are separated automatically at scan time.'

Administration Batch Export License Utility OCR Full Text

Home Insert View Scan Settings

Create Scan Delete Rotate Mode Page Document Folder

Remaining Volume Image: 19007 Scanner Profiles:

Batch Contents

Product Orders / 1 / Student01

1: Northwest

2: Northwest

3: Northwest

4: Northwest

5: Northwest

Northwest Products

Ordered By:

Ship To:

Because Fixed Pages was selected as the separation method, documents are separated automatically at scan time.

Report Viewer Scan

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.



Export



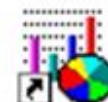
License Utility



OCR Full Text



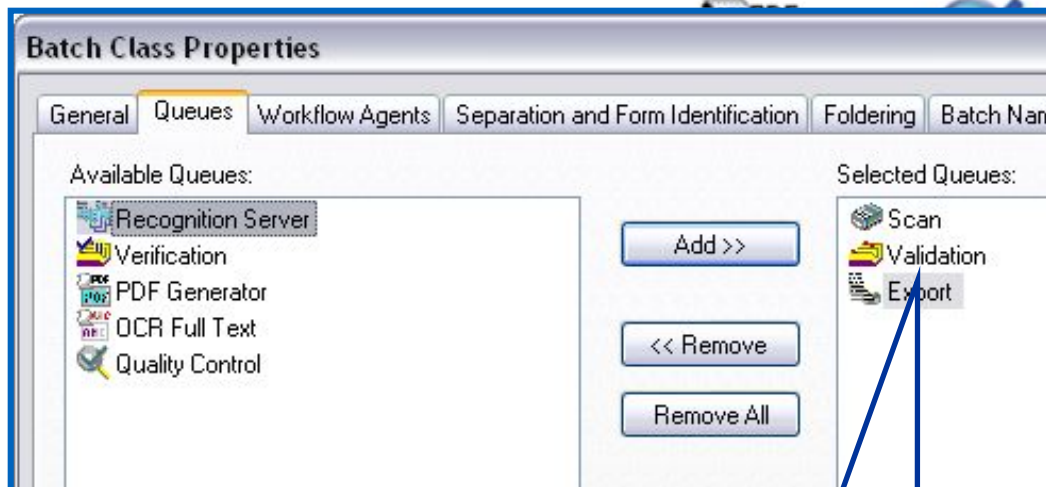
Recognition Server



Report Viewer



Scan



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

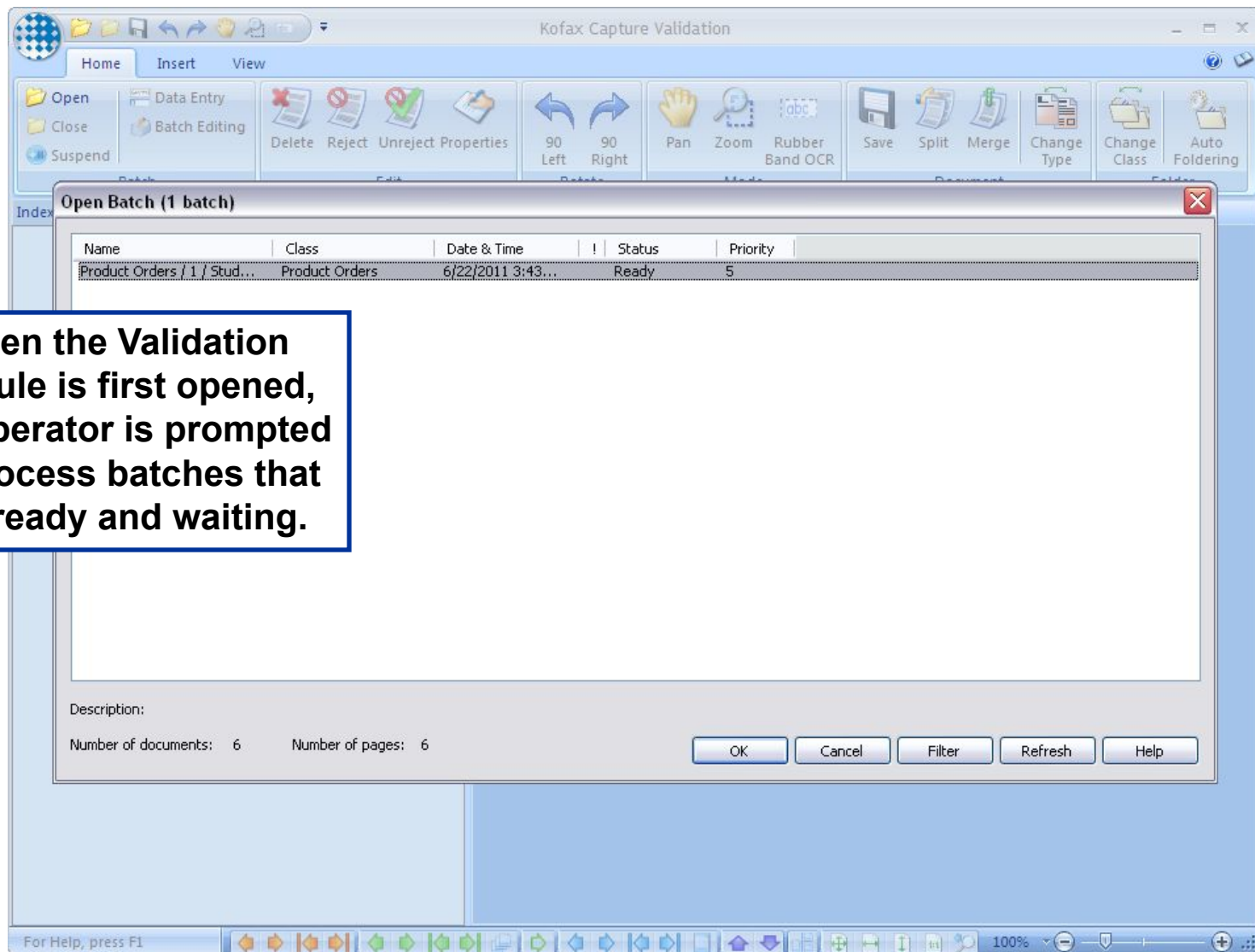


Validation



Verification

Selecting and Opening Batches

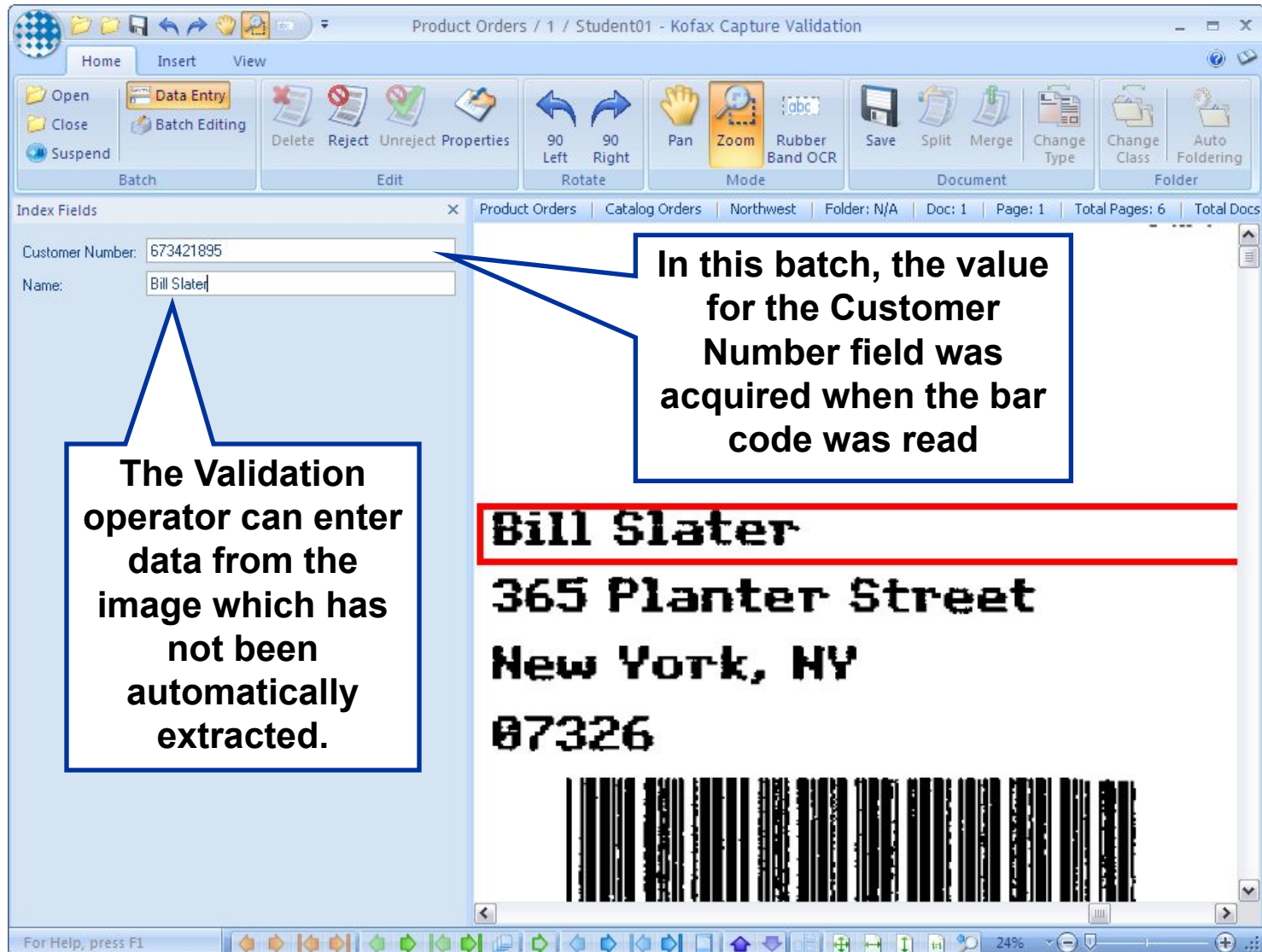


When the Validation module is first opened, the operator is prompted to process batches that are ready and waiting.

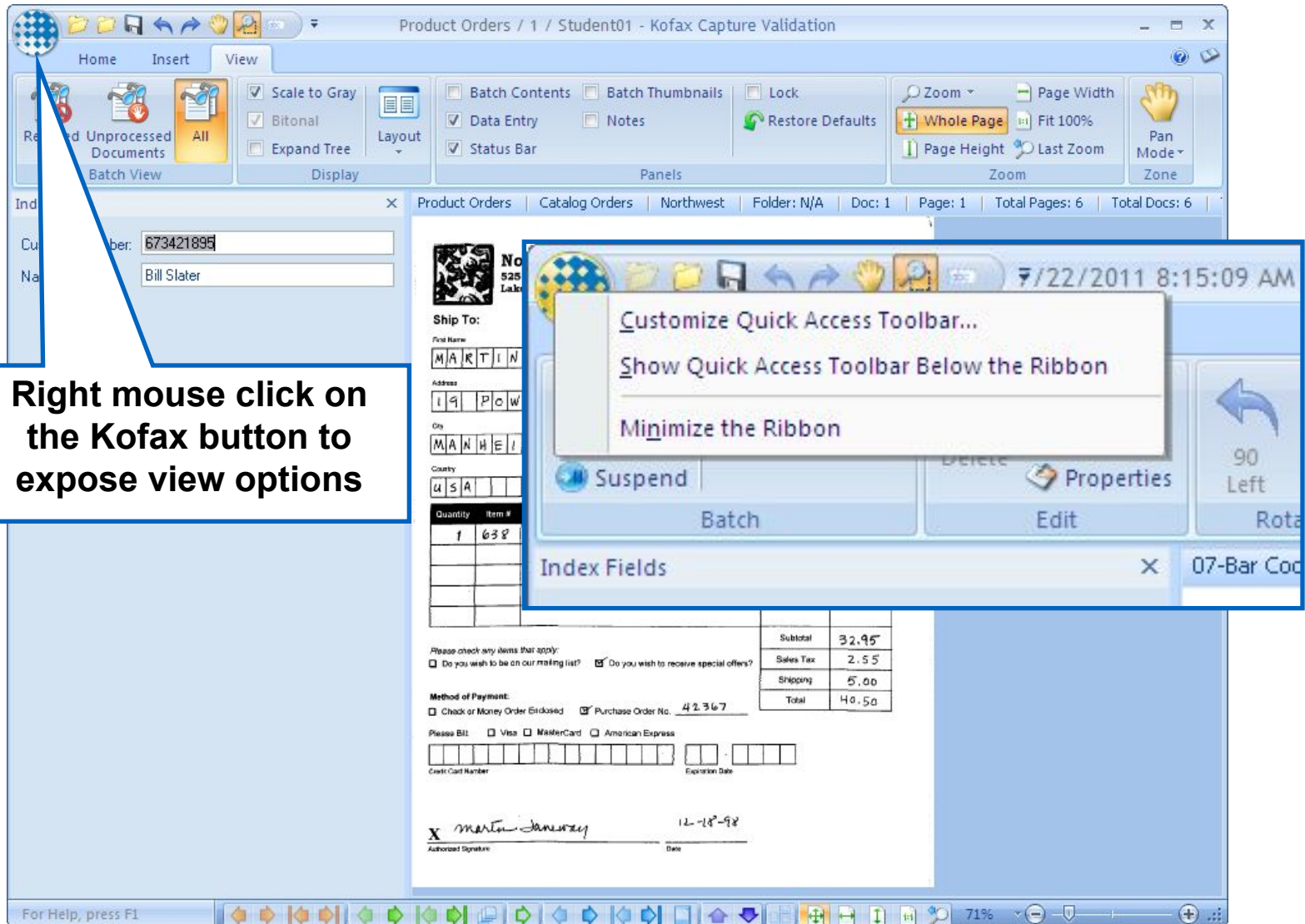
Validation Module – Processing the Batch

The Validation model consists of an index (where index data can be entered or changed) and a viewer where the images are displayed.

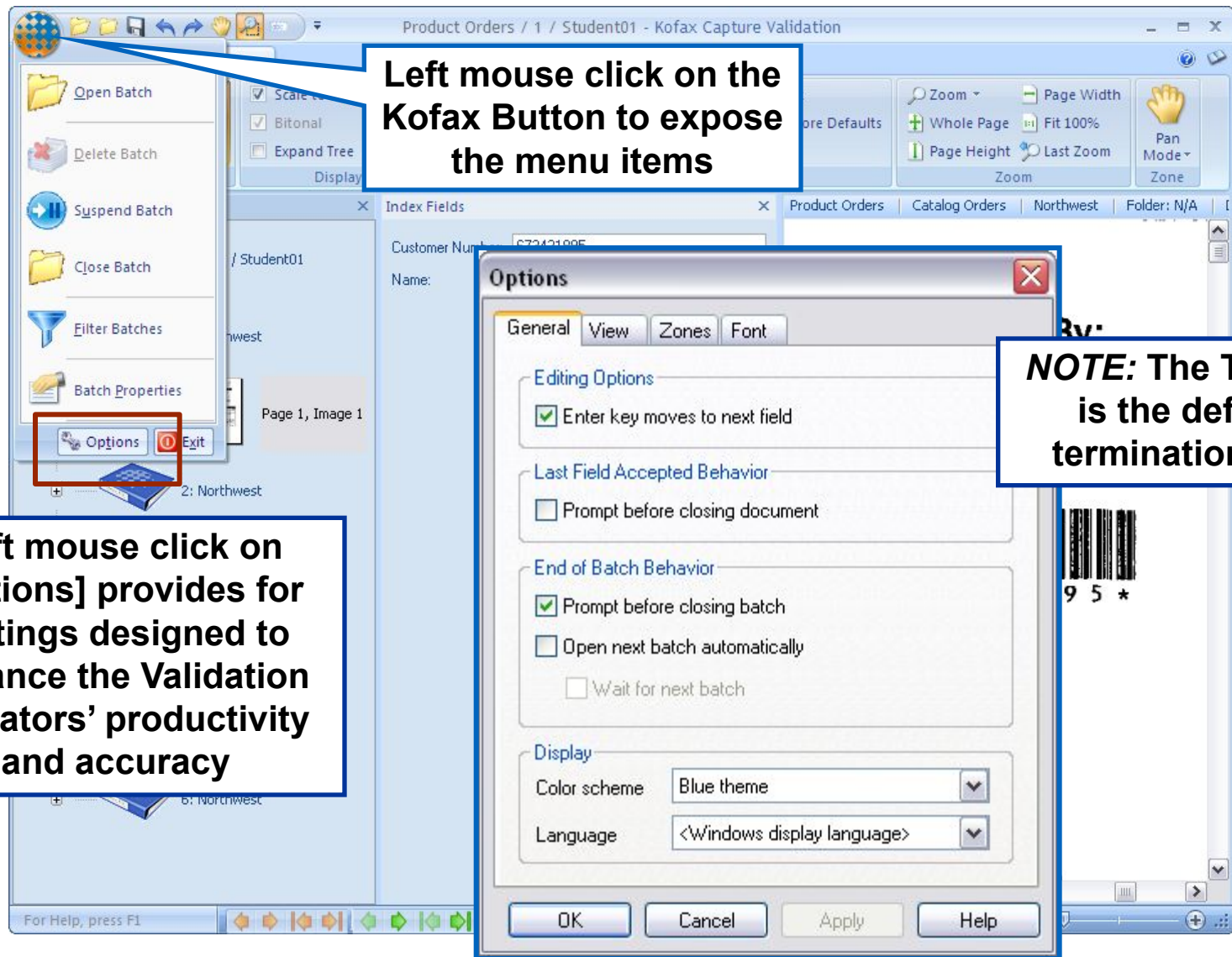
Manual Data Entry



Validation Module



Validation Module Options



Filtering Batches

The screenshot displays the Kofax Capture Validation interface. On the left, a sidebar contains icons for '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 sample batch document with the following details:

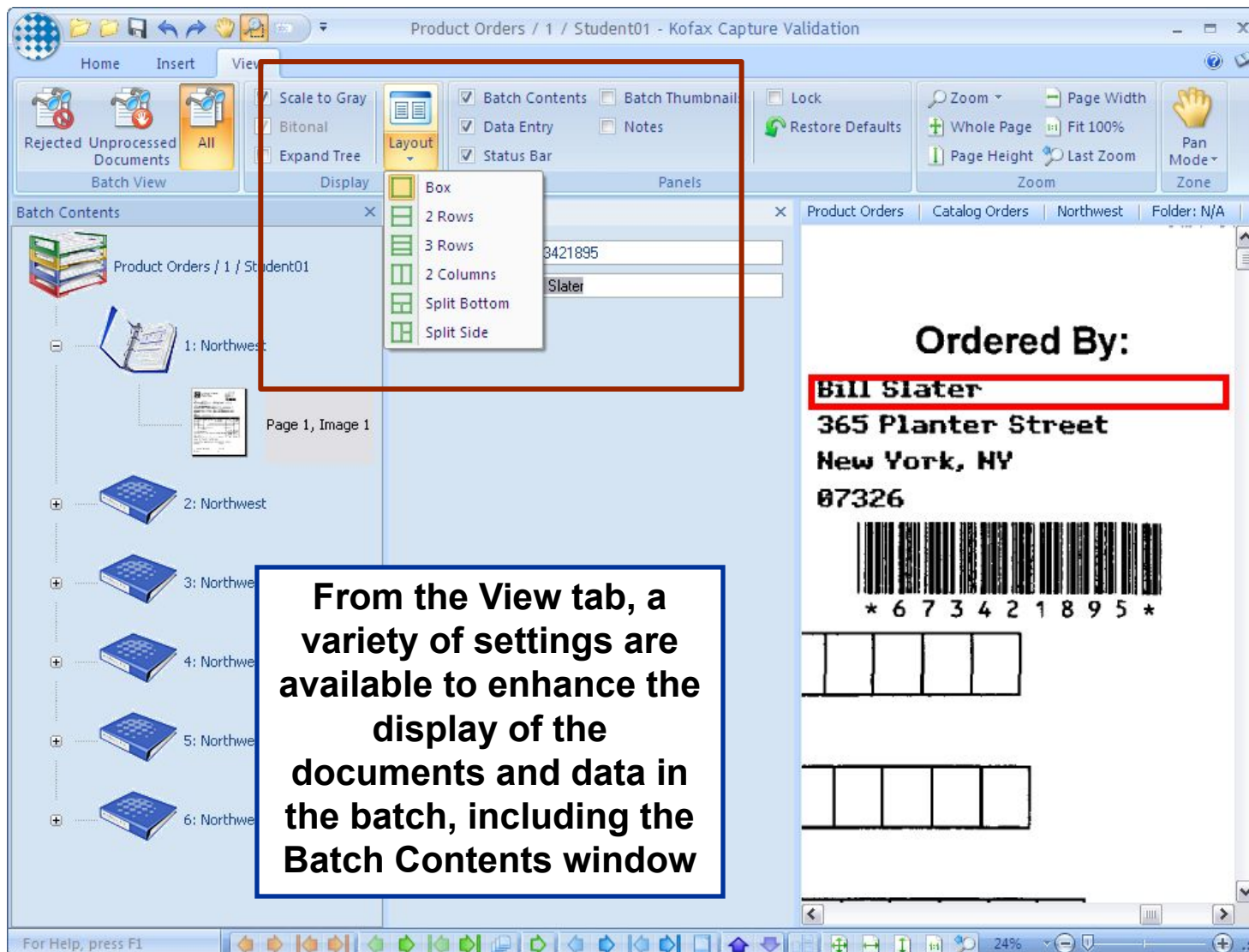
- Customer Number: 673421895
- Name: Bill Slater
- Ordered By: Bill Slater
- 365 Planter Street

The 'Filter Batches' dialog box is open in the foreground, showing the following criteria:

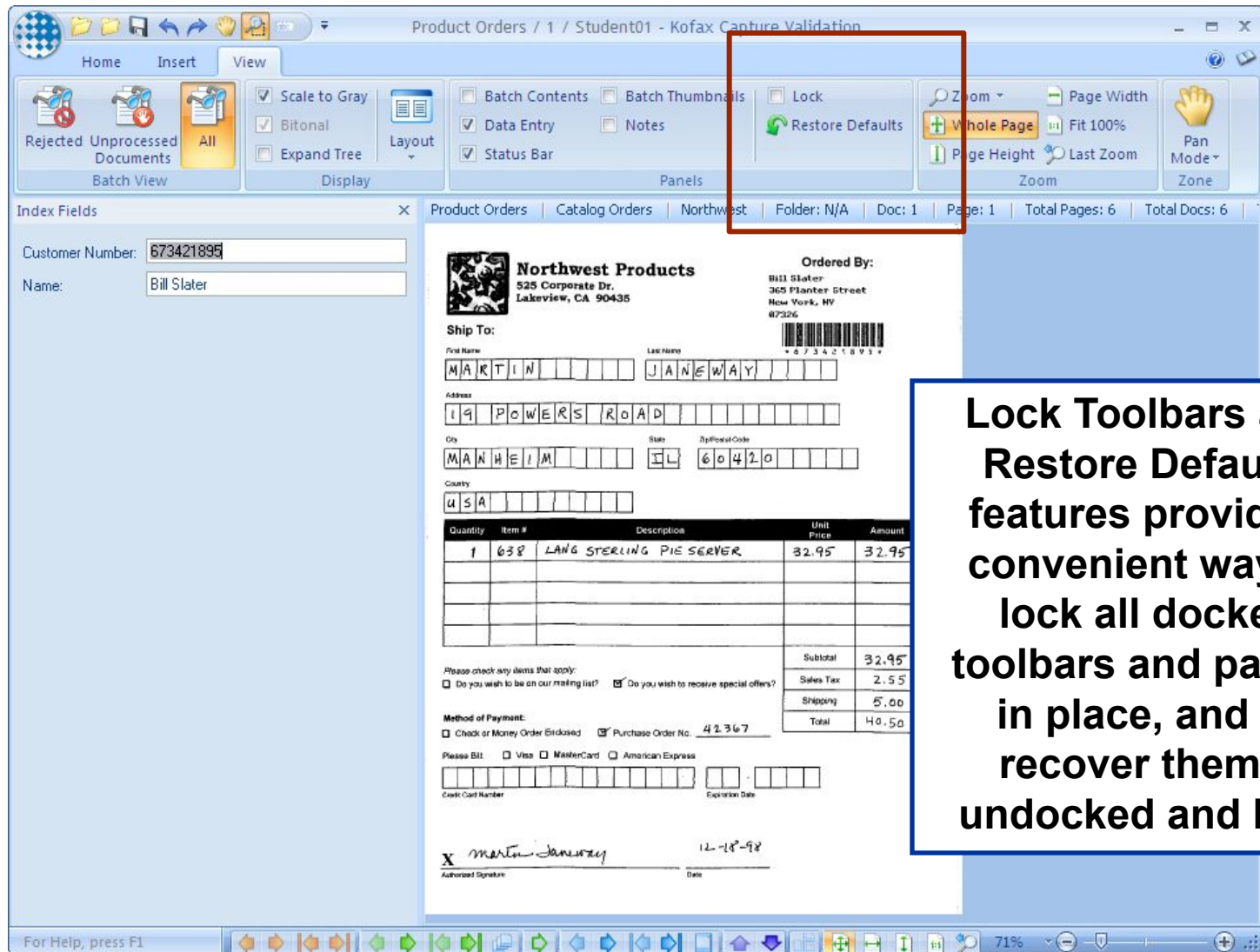
- Priority: Equal to 1
- Has error: Equal to False

A callout box points to the dialog with the text: "Select the criteria, and then apply the settings to filter the batches". The dialog also includes buttons for 'Add Criteria', 'Remove All', 'Enable filtering' (checked), 'OK', 'Cancel', and 'Help'.

Display Options

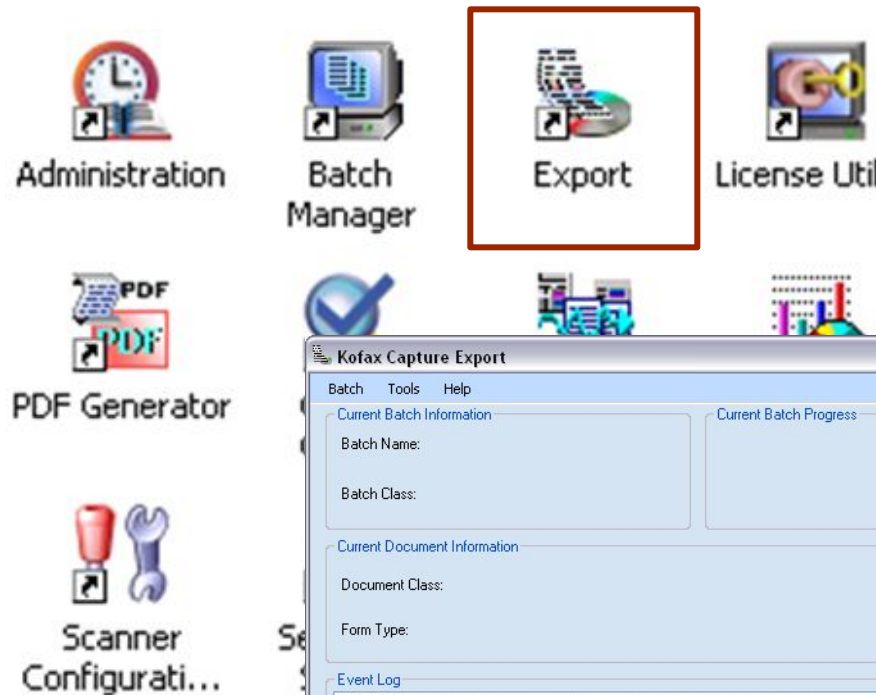


Lock Toolbars and Restore Defaults

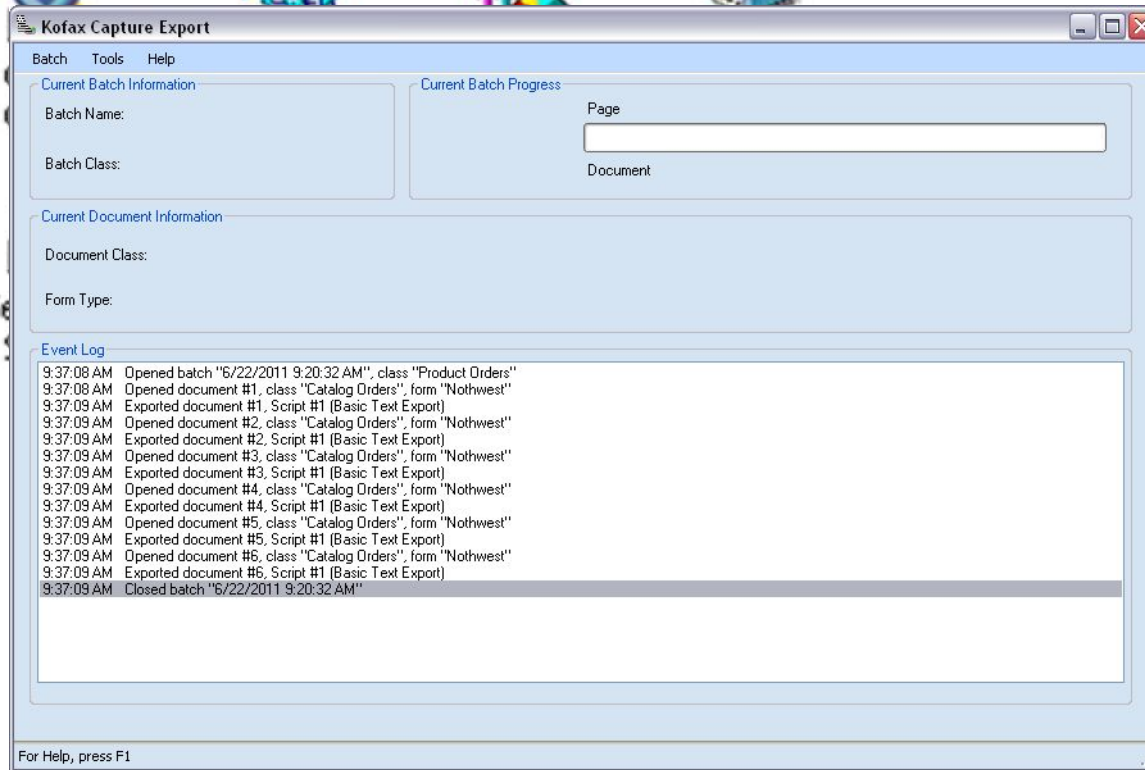


Lock Toolbars and Restore Defaults features provide a convenient way to lock all docked toolbars and panels in place, and to recover them if undocked and lost.

Run the Export Module

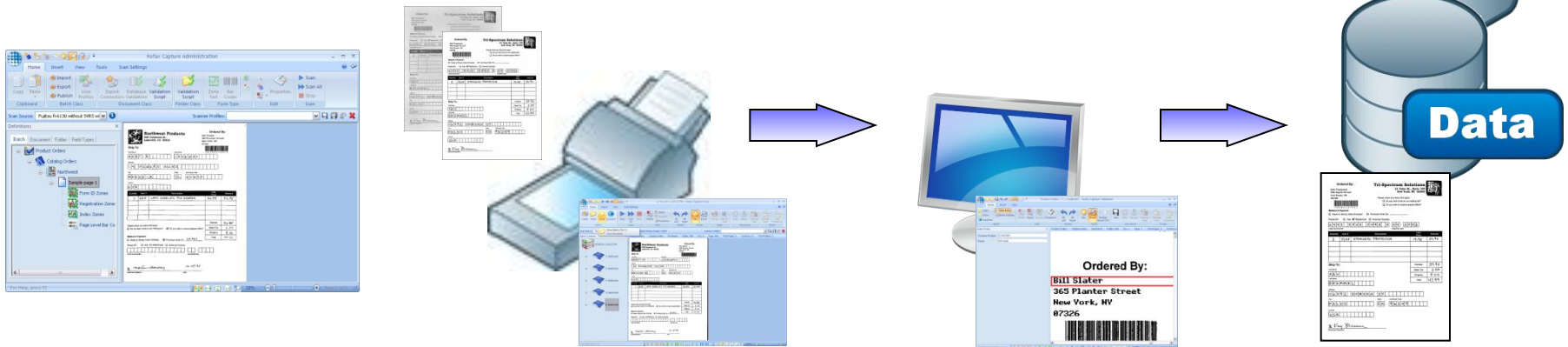


At the conclusion of the Validation operation, run the Export module to archive the data and the documents.



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

