

Park University

Using

Kofax

Capture V11

Version 1.0

March 15, 2021

FileNet P8 Configuration Information

Revision History

Revision	Date	Author	Description
1.0	03/15/2021	Mike Bishop	Initial creation.

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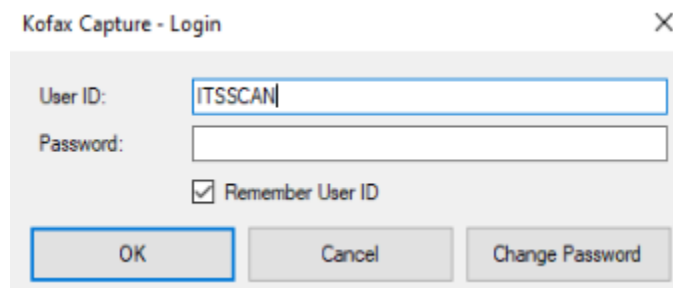
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Login

1. When you log on to a Kofax Capture V11 server you will be prompted for your Capture credentials. This should be your scan station name for the User ID and no password.

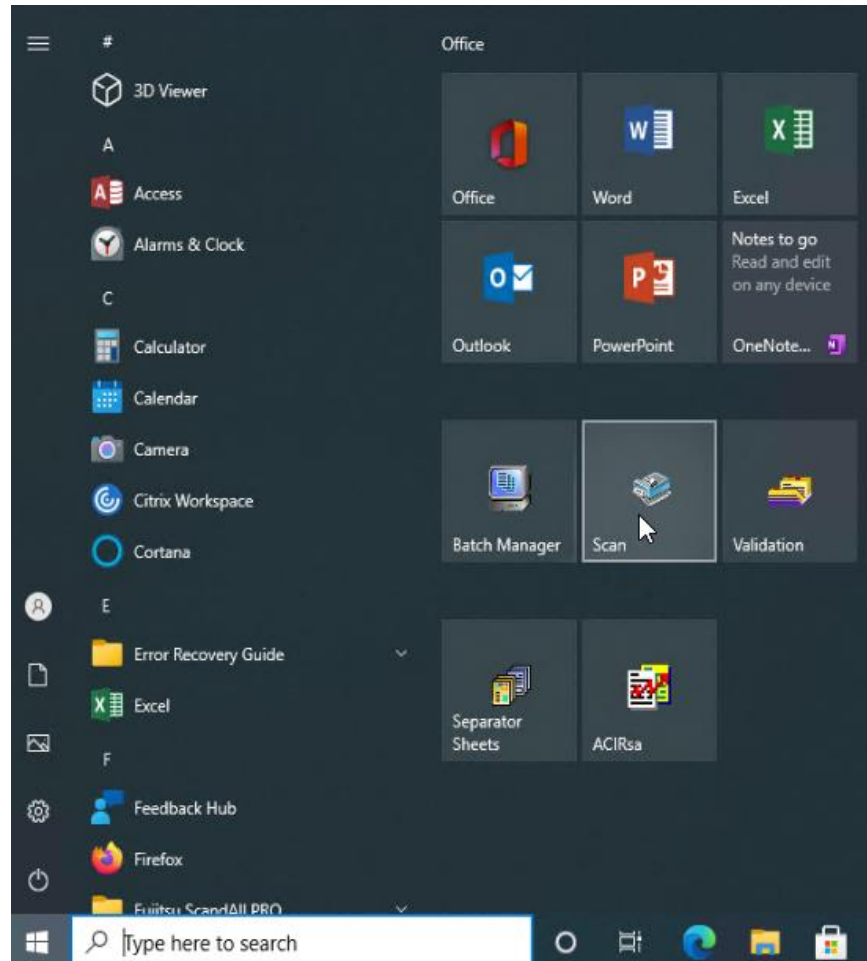


The image shows a 'Kofax Capture - Login' dialog box. It has a title bar with a close button (X). Inside, there are two text input fields: 'User ID:' and 'Password:'. The 'User ID' field contains the text 'ITSSCAN'. Below the 'Password' field is a checkbox labeled 'Remember User ID' which is checked. At the bottom, there are three buttons: 'OK', 'Cancel', and 'Change Password'.

Kofax Capture - Login		X
User ID:	ITSSCAN	
Password:		
☒ Remember User ID		
OK	Cancel	Change Password

Scanning

1. Click on the Windows Start button to bring up the Start menu. Then click on the Scan icon to open the Scan module.



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2. When the Create Batch window opens click the dropdown to the right of the Batch class field.

Create Batch

General Totals Scan

Batch class: AA Backfile Fixed Pages Priority: 5

Description:

Name: 3/3/2021 11:20:03 AM

Description:

Pages per document: 0 Documents per batch: 0 Pages per batch: 0

Batch Fields:

Scan OK Cancel Help

3. Using the scroll bar select the batch class that you'd like to scan.

Create Batch

General Totals Scan

Batch class: AA Backfile Fixed Pages Priority: 5

Description:

Name:

Description:

Pages per document: Documents per batch: 0 Pages per batch:

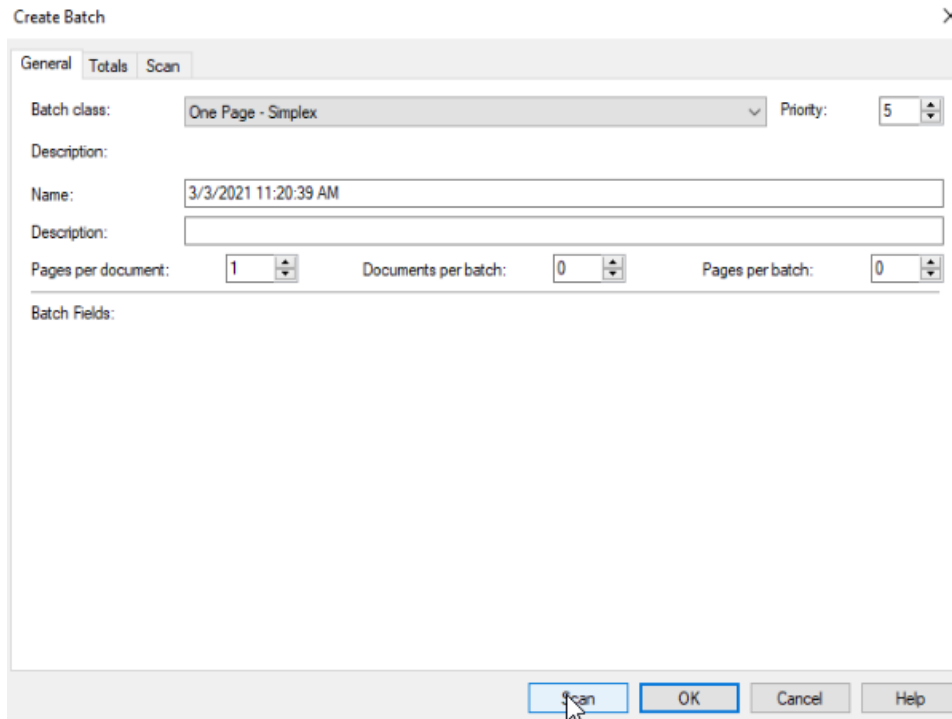
Batch Fields:

Scan OK Cancel Help

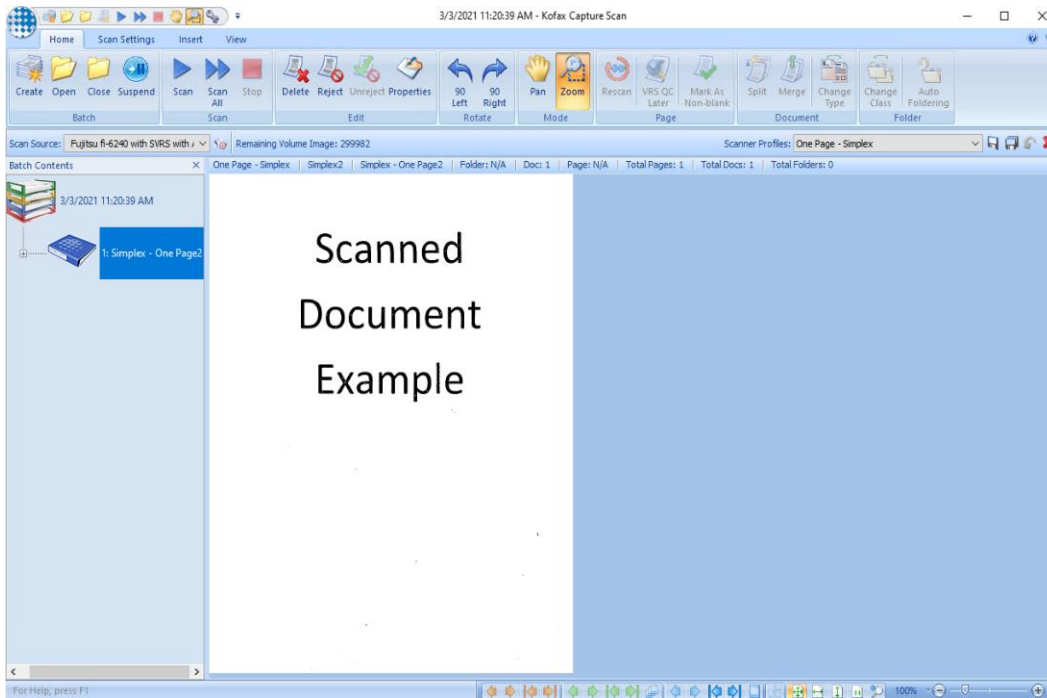
- Insurance - Simplex
- Invoice
- Invoice - Backfile w Sep Sheets
- Invoice - Mltipg Simplex w S Sht
- Invoice - Search
- Invoice Process - Electronic
- Manual Checks
- MOU One Page - Simplex
- Multi Page Duplex - NonID
- Multi Page Simplex - NonID
- Multi-page Duplex w Sep Sheets
- Multi-page Simplex w Sep Sheets
- Non Specific - Non ID
- NonID
- One Page - Duplex
- One Page - Simplex
- One Page Duplex - NonID
- One Page Simplex - NonID
- Payroll - Duplex
- Payroll - Mltipg Simplex w S Sht
- Payroll - Multipg Dplx w S Sheet
- Payroll - Simplex
- President Speeches
- PS - Duplex
- PS - Multipage Duplex w S Sheets
- PS - Multipage Simplex w S Sheet
- PS - Simplex
- Purchase Card - Backfile
- Purchase Card Fixed Pages
- Purchase Card Receipts

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- Click the Scan button.

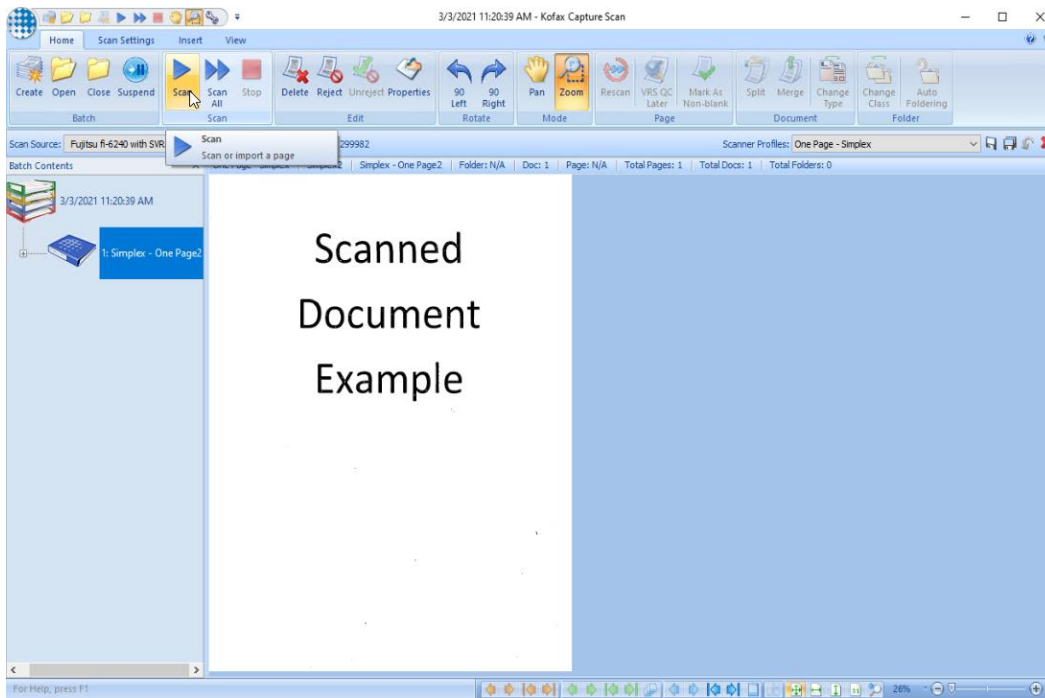


- The scanned document will appear in the Scan module window.

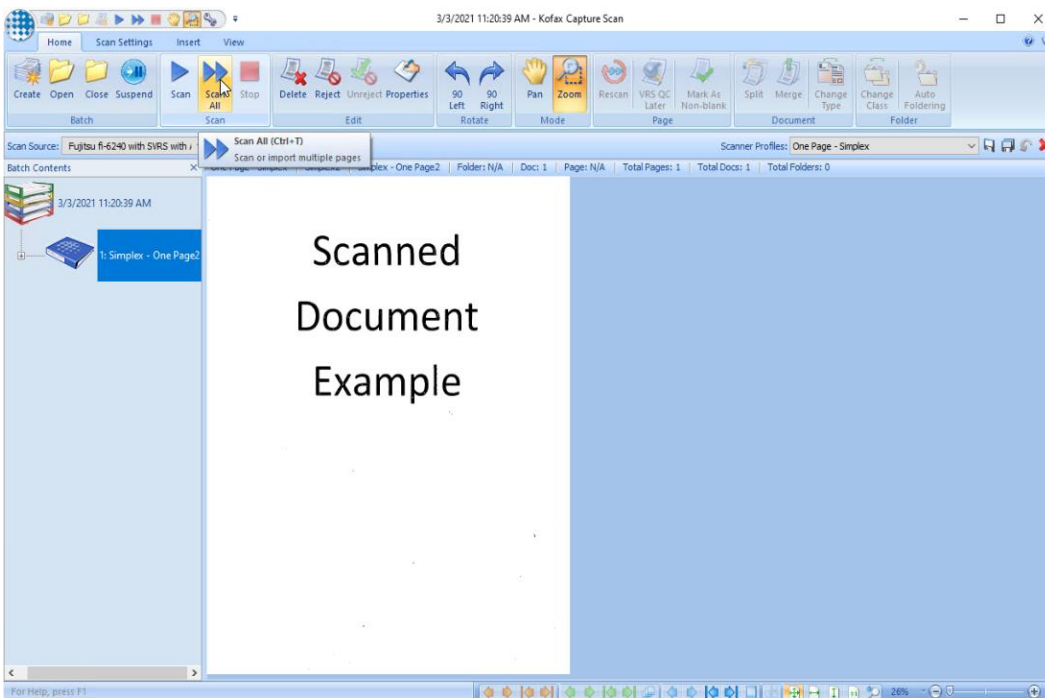


FileNet P8 Configuration Information

6. If you need to add a single document to the batch insert the page into the scanner then click the Scan button.

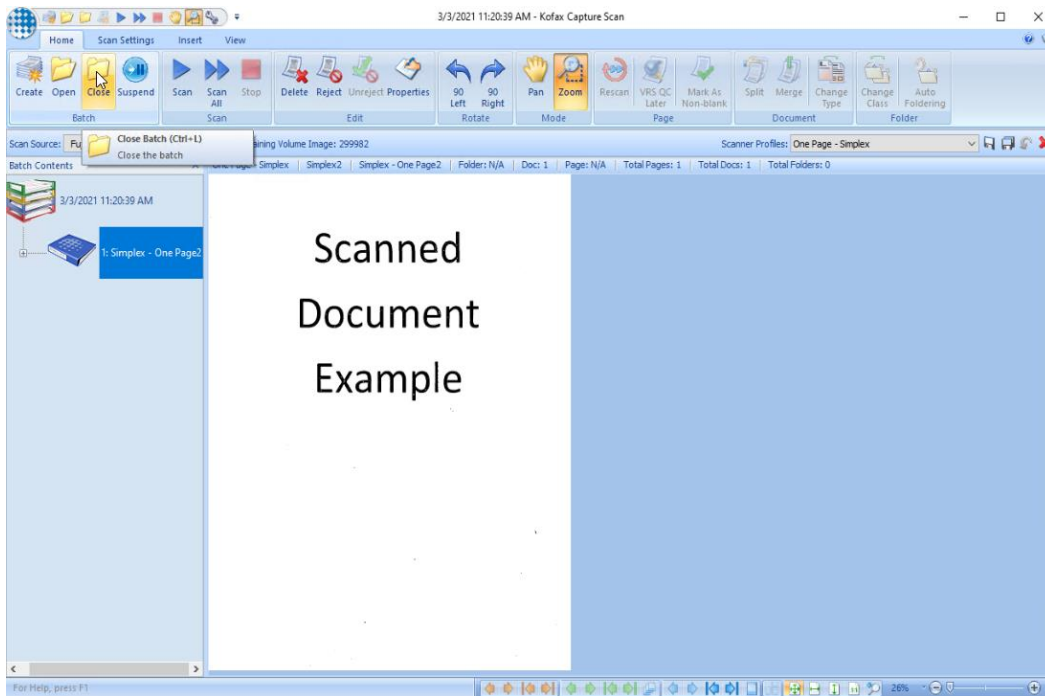


7. If you need to add a multiple documents to the batch insert the pages into the scanner then click the Scan All button.

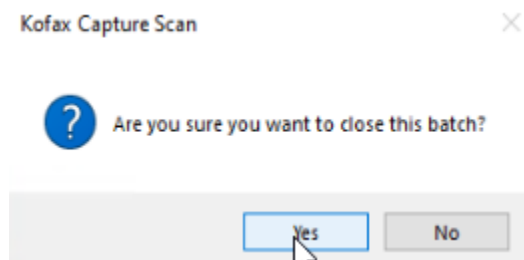


FileNet P8 Configuration Information

- When you have completed scanning documents click the Close button.

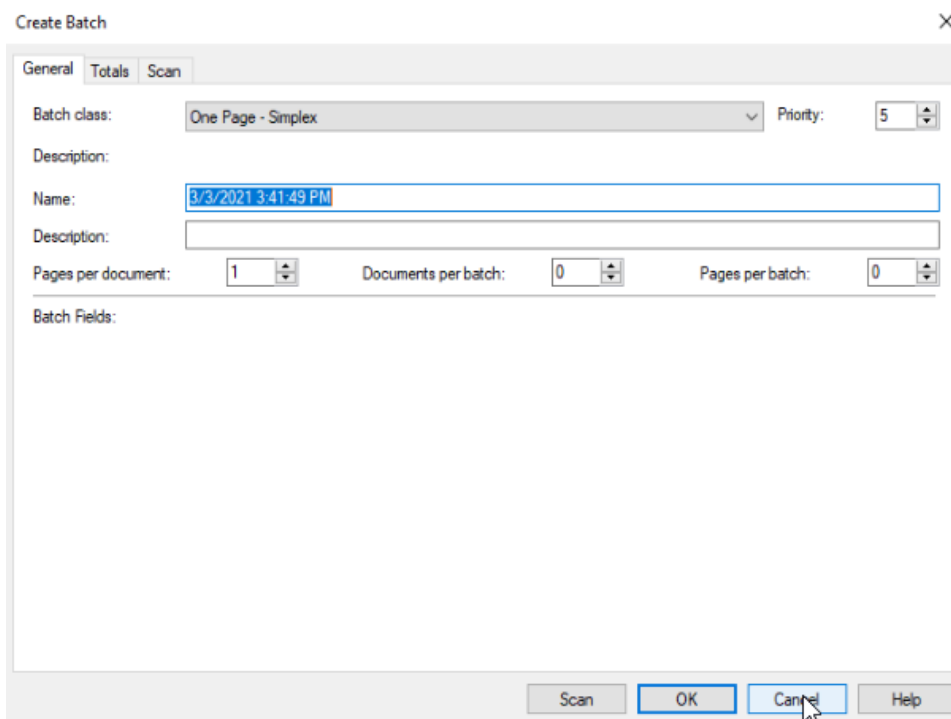


- When prompted to close the batch click Yes.

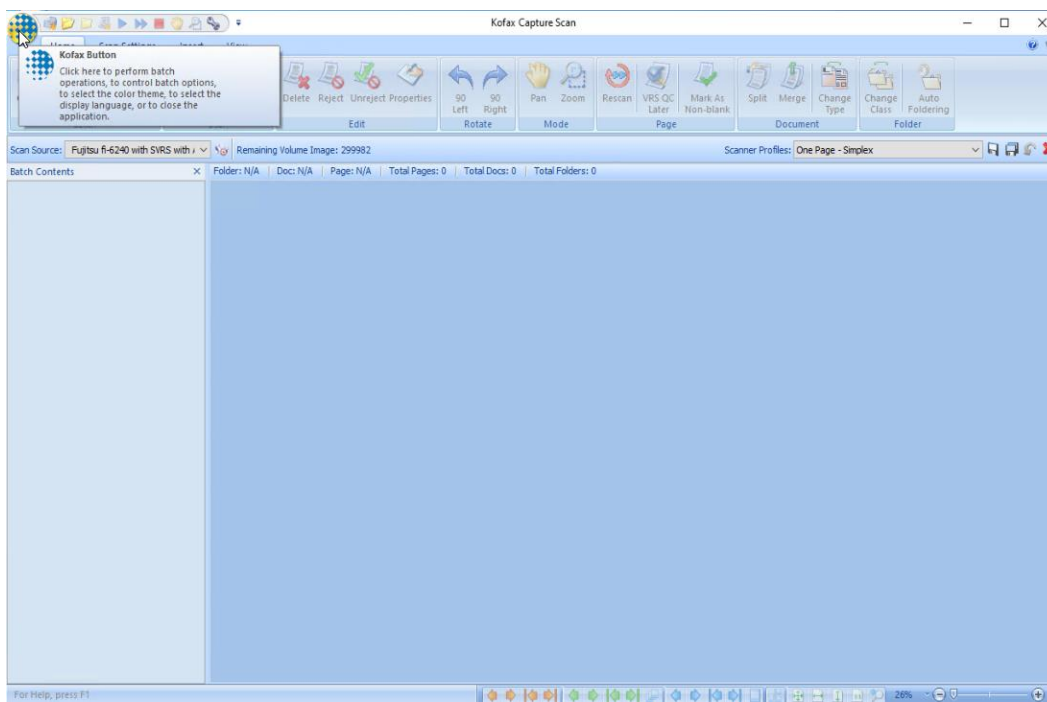


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10. When returned to the Create Batch window click cancel.

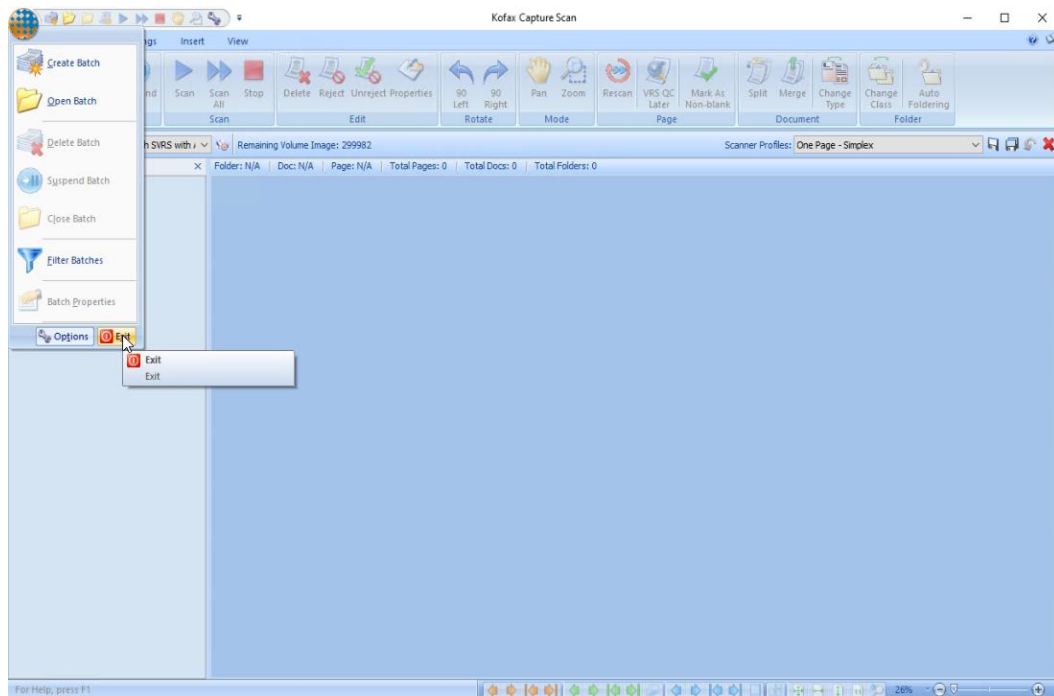


11. To exit the Scan module click the Kofax Button in the upper left corner of the window.



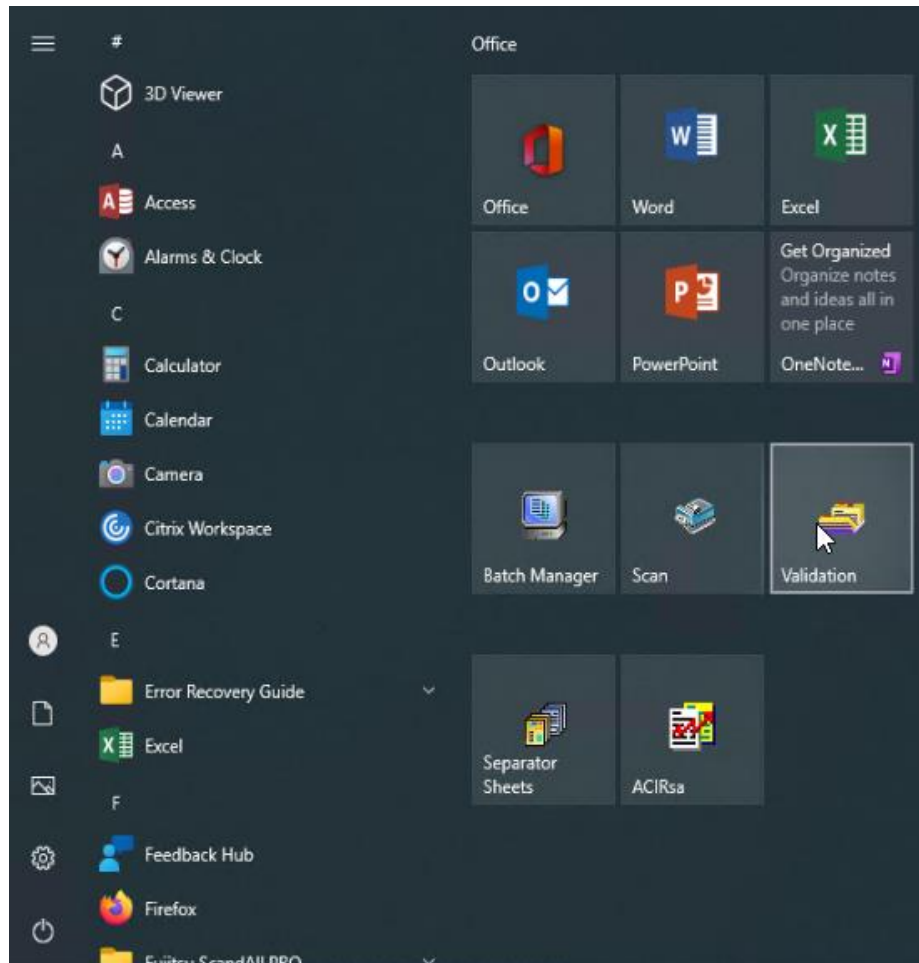
FileNet P8 Configuration Information

12. Click Exit on the dropdown menu.



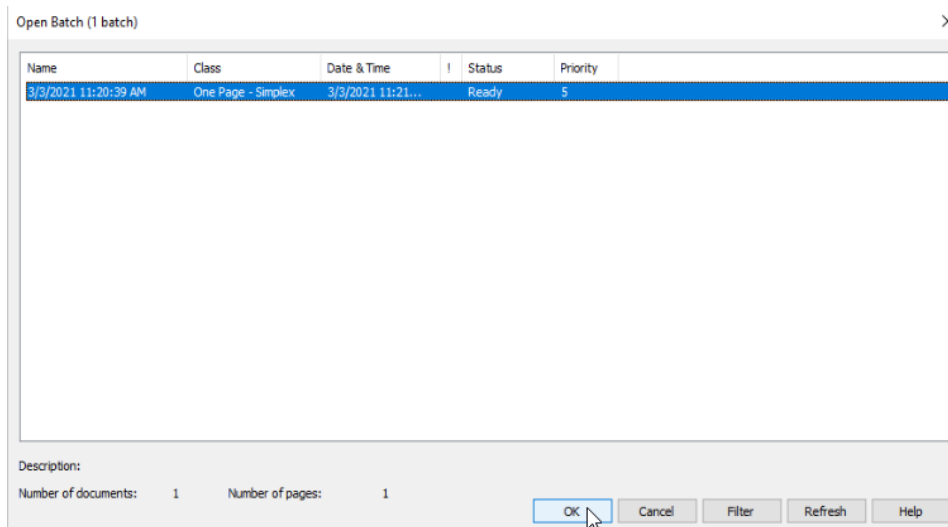
Validation

13. Click on the Windows Start button to bring up the Start menu. Then click on the Validation icon to open the Validation module.

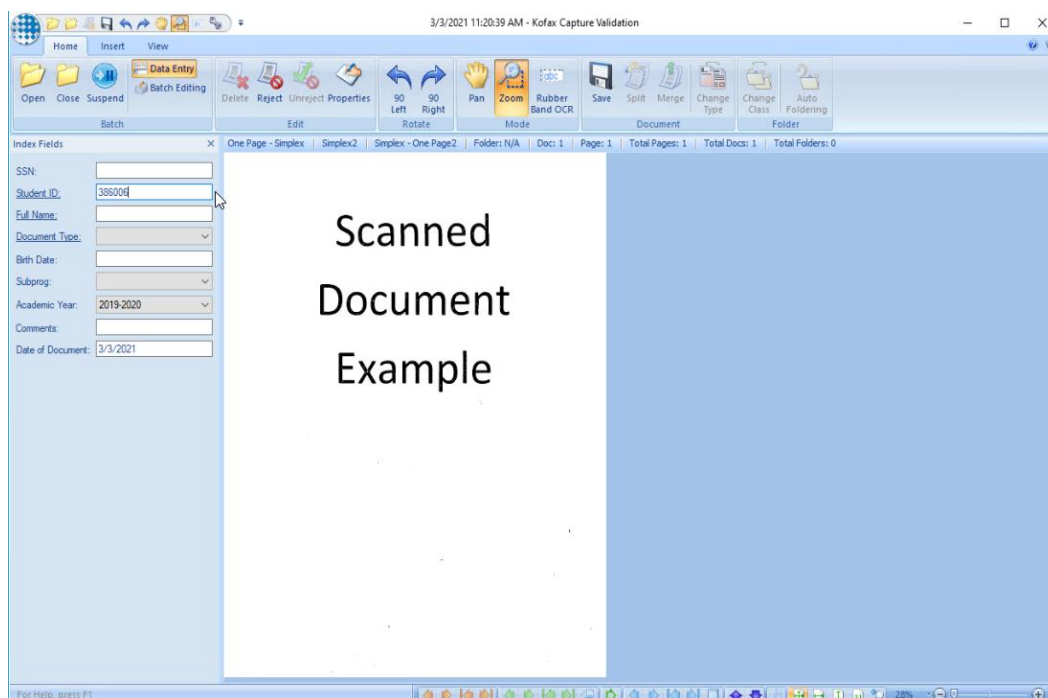


FileNet P8 Configuration Information

14. When the Open Batch window appears select a batch to validate then click OK.

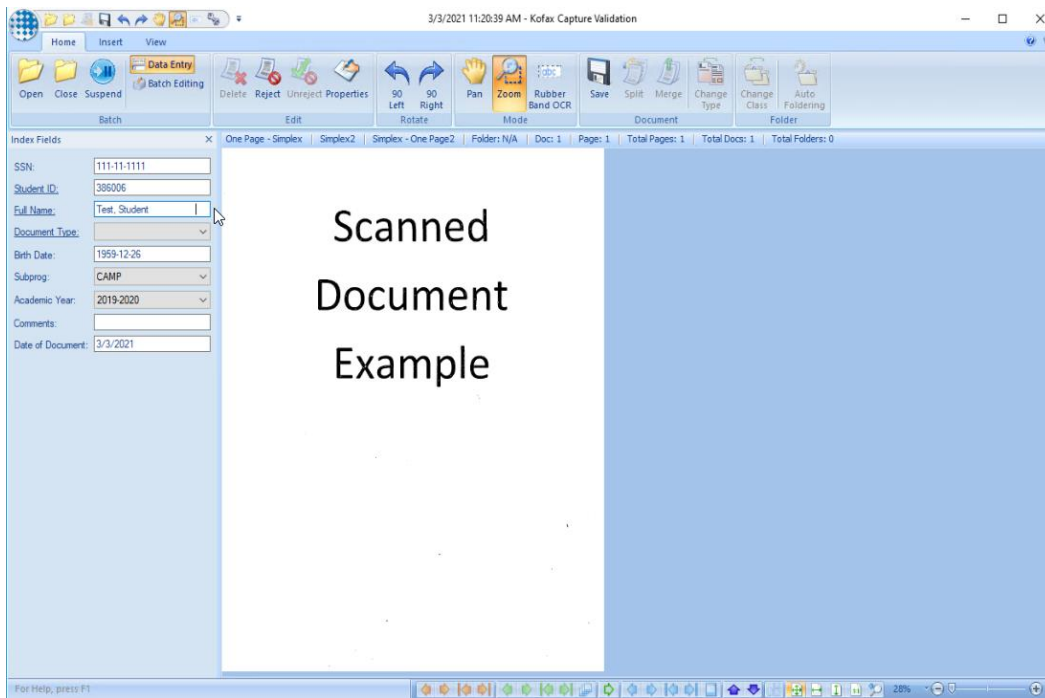


15. When the batch opens click in one of the fields to enter ID information (in this example the Student ID field is used).

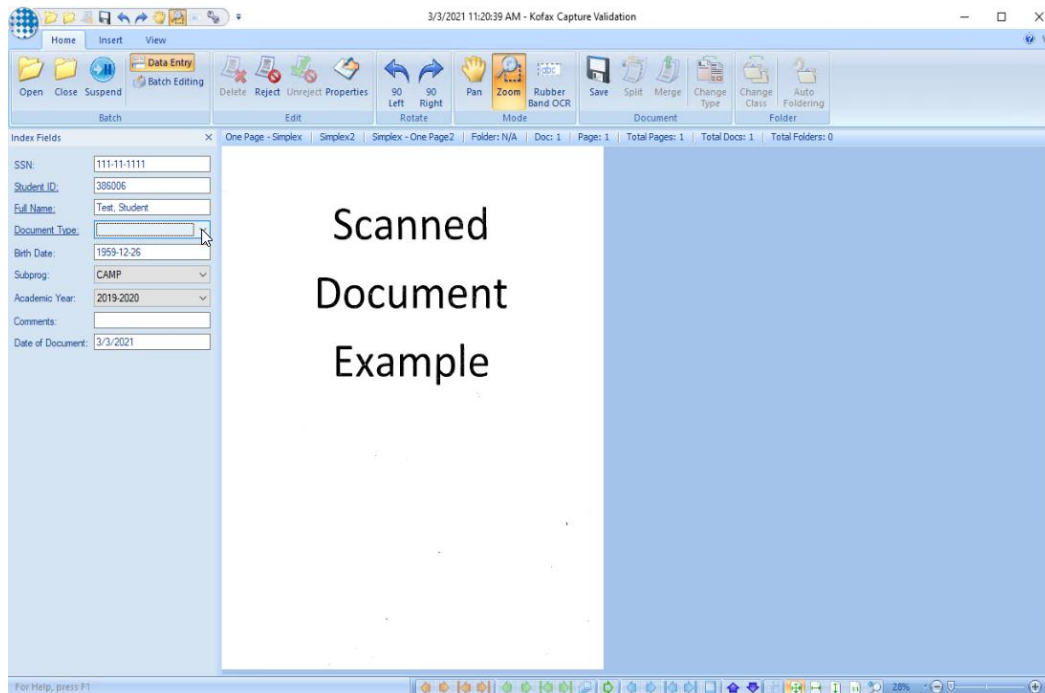


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16. Press the Tab key to tab out of the field and to auto-populate what can be auto-populated for the batch (Student ID in this example).



17. Click the dropdown arrow next to the Document Type field.



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18. Select a Document Type from the Document Type list.

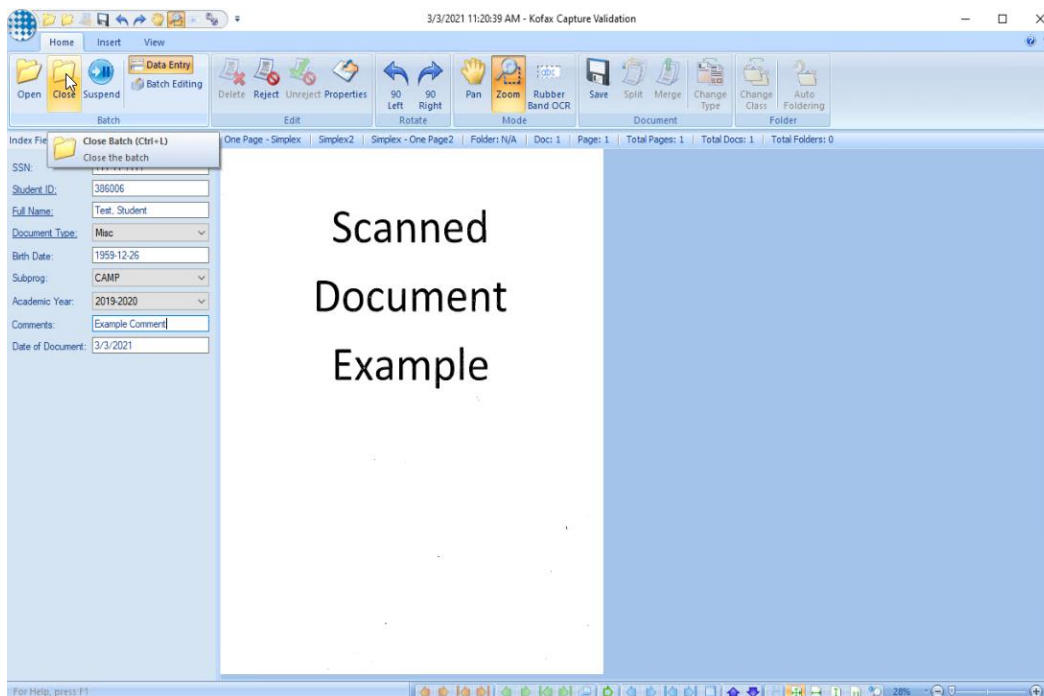
The screenshot shows the FileNet P8 Capture Validation window. The title bar indicates the date and time as 3/3/2021 11:20:39 AM. The interface includes a menu bar (Home, Insert, View) and a toolbar with various icons for document manipulation. The main area displays a scanned document with the text "Scanned Document Example". On the left, the "Index Fields" panel is visible, showing a list of document types. The "Document Type" dropdown menu is open, displaying a list of options including "Marriage Certificate", "MBA Program Requirement", "Military Credit Worksheet", "Military Information Form", "Misc", "Missouri Reverse Transfer", "N.C. Waiver Approval", "Needs Analysis Form", "Non-Tax Filer Statement", "NSLDS Reports", "Nursing Academic Study", "Nursing Academic Summ", "Packaging Worksheet", "Park Request for Financial", "Park U. Acceptable Use F", "Passport", "Payment", "Performance Grant", "Permanent Resident Card", "Plus Loan Information", "Probation Report", "Reapplication Form", "Receipt-Check", "Receipt-Credit Card Paym", "Receipt-Credit Card Void", "Receipt-Department Chec", "Receipt-HP", "Receipt-Purchase Card R", "Receipt-SDS", and "Repackaging Form". The "Date of Document" field is set to 3/3/2021.

19. Enter any additional information (Comment in this example).

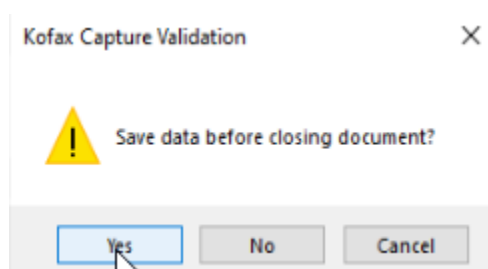
The screenshot shows the FileNet P8 Capture Validation window with the same scanned document. The "Index Fields" panel on the left now shows the "Document Type" dropdown set to "Misc". The "Comments" field is populated with "Example Comment". The "Date of Document" field remains set to 3/3/2021. The main area still displays the scanned document with the text "Scanned Document Example".

FileNet P8 Configuration Information

20. When all information has been entered click the Close button to close the batch.

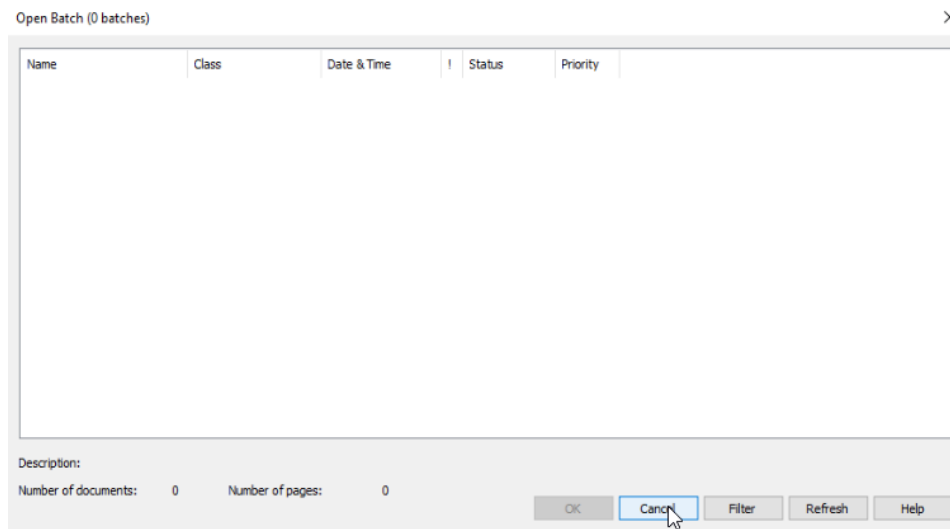


21. When prompted to save data before closing document click Yes.

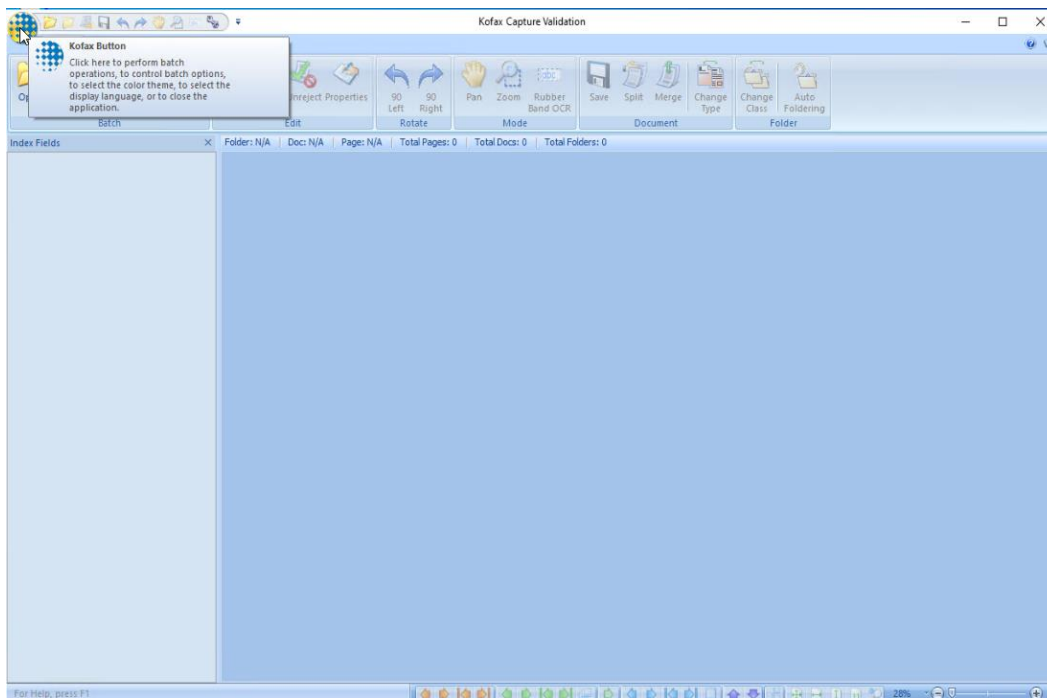


FileNet P8 Configuration Information

22. When returned to the Open Batch window click Cancel.

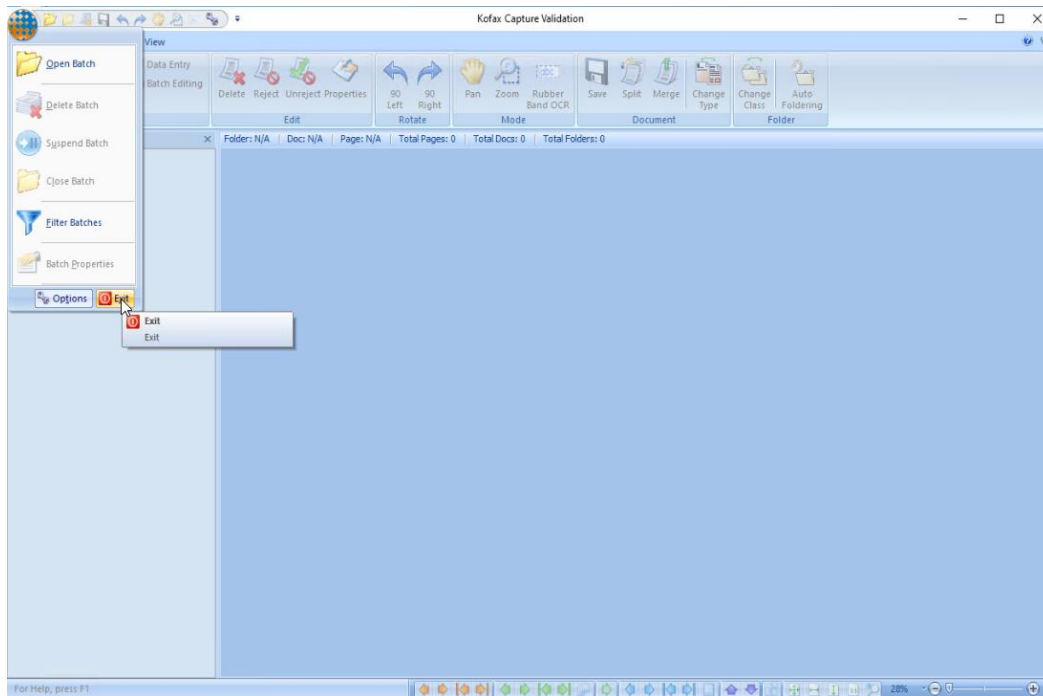


23. To exit the Validation module click the Kofax Button in the upper left corner of the window.



FileNet P8 Configuration Information

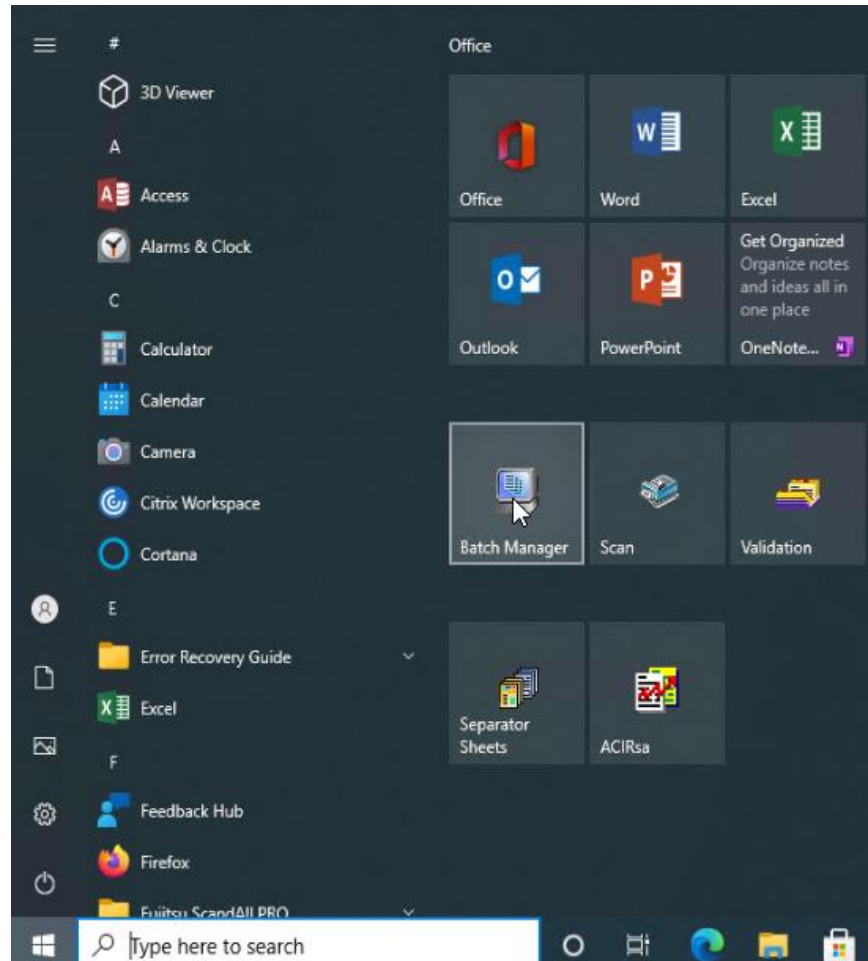
24. Click Exit on the dropdown menu.



Batch Manager

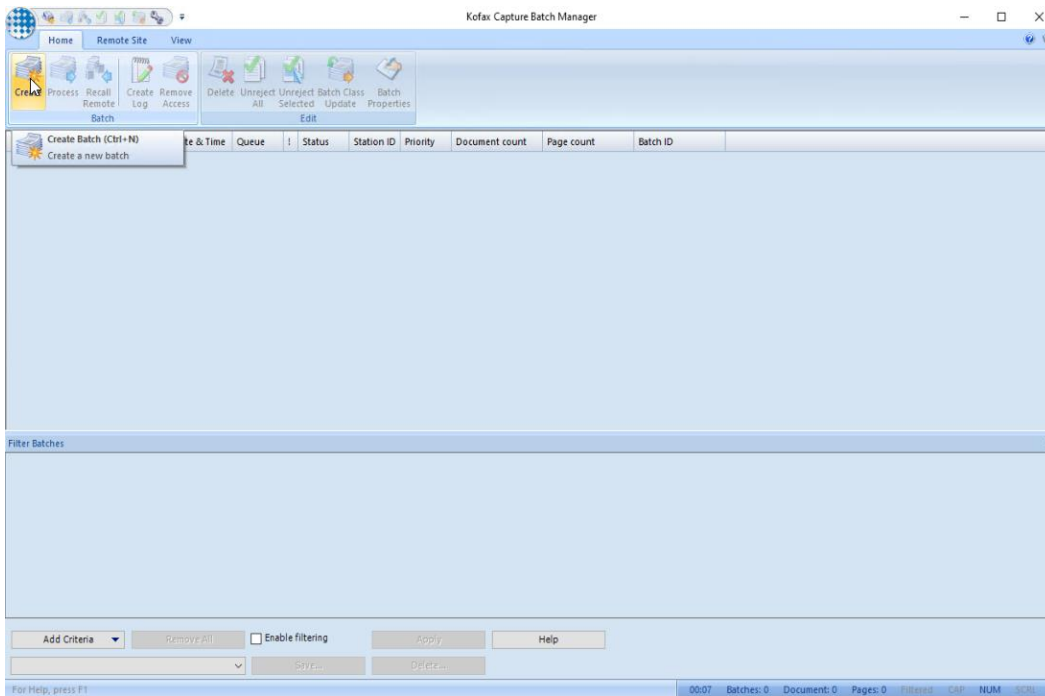
Batch Manager can be used as a one-stop application to scan and validate without having to go into the individual scan and validation modules.

1. Click on the Windows Start button to bring up the Start menu. Then click on the Batch Manager icon to open the Batch Manager module.

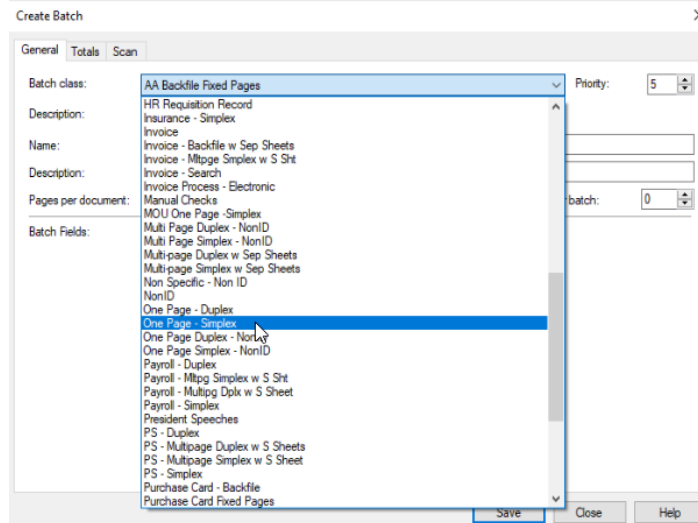


FileNet P8 Configuration Information

- When Batch Manager opens click the Create Batch icon on the upper left corner.



- When the Create Batch window opens click the dropdown arrow to the right of the Batch class field then select the batch class.



FileNet P8 Configuration Information

- Once the batch class has been selected verify the batch class then click Save.

Create Batch

General Totals Scan

Batch class: One Page - Simplex Priority: 5

Description:

Name: 3/3/2021 4:04:48 PM

Description:

Pages per document: 1 Documents per batch: 0 Pages per batch: 0

Batch Fields:

Save Close Help

- Click Close.

Create Batch

General Totals Scan

Batch class: One Page - Simplex Priority: 5

Description:

Name: 3/3/2021 4:05:09 PM

Description:

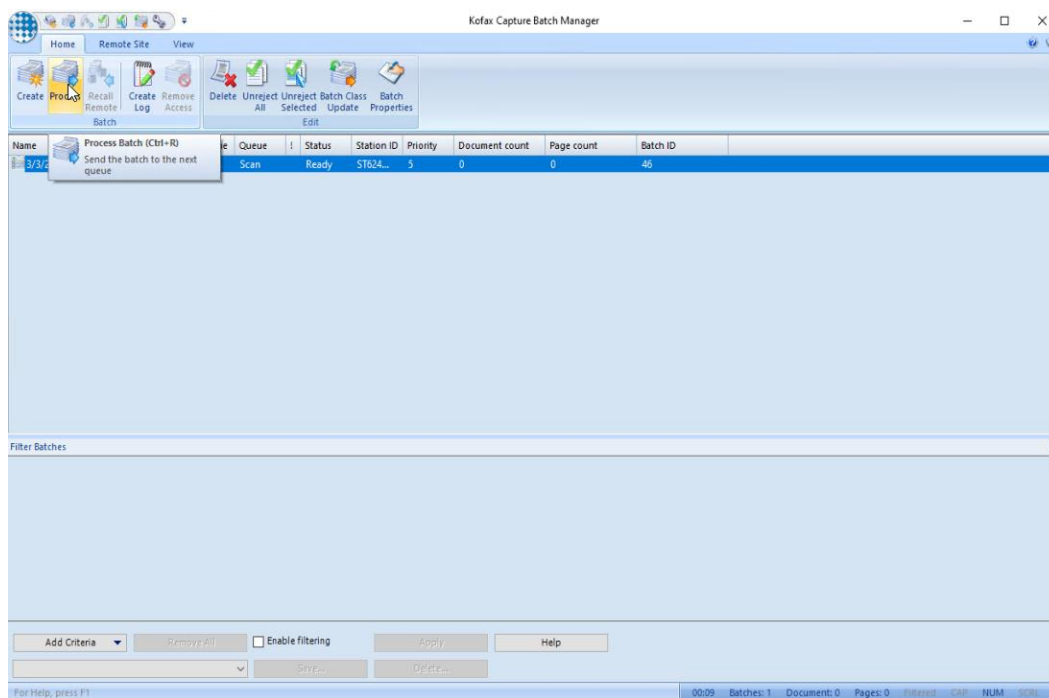
Pages per document: 1 Documents per batch: 0 Pages per batch: 0

Batch Fields:

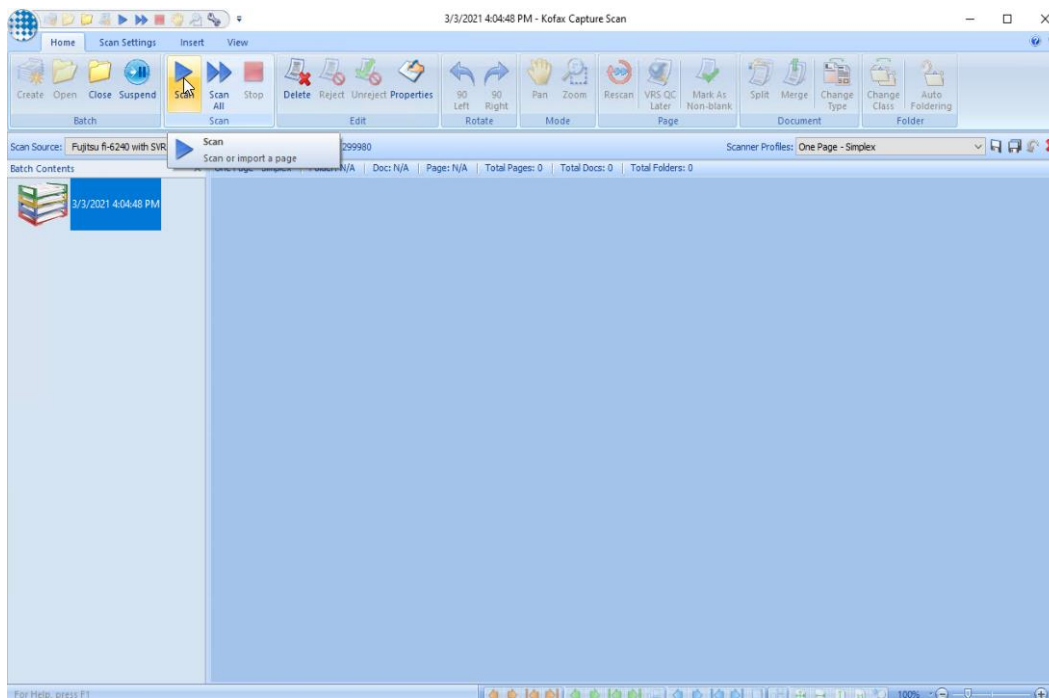
Save Close Help

FileNet P8 Configuration Information

- When returned to the main Batch Manager window select the batch just created then click the Process button in the upper left corner.

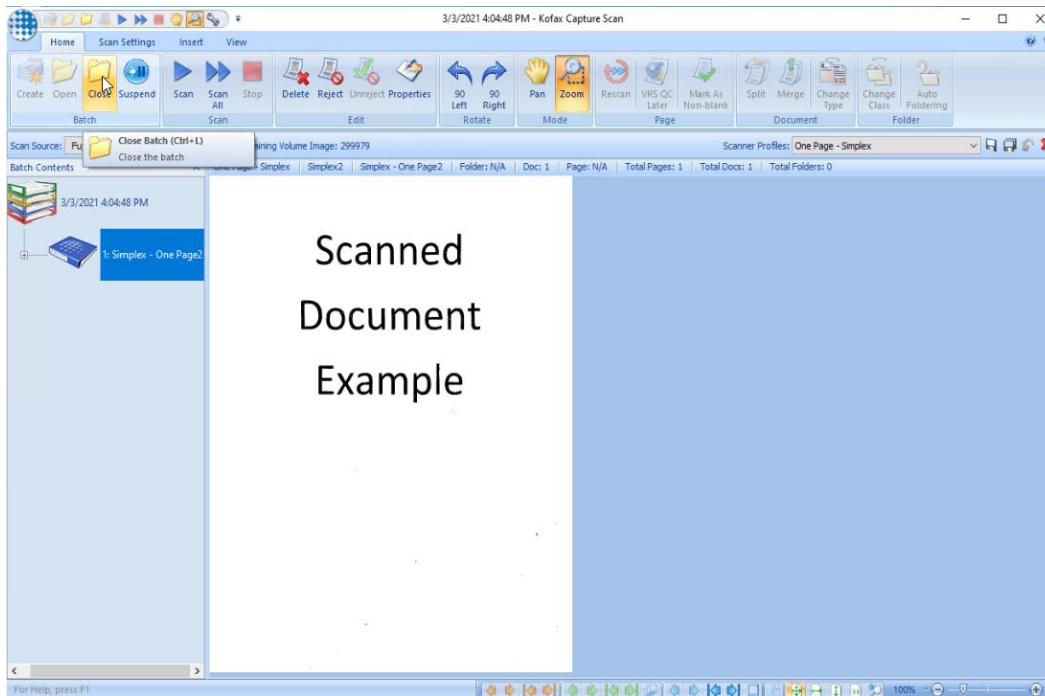


- Insert the document into the scanner then click the Scan button.

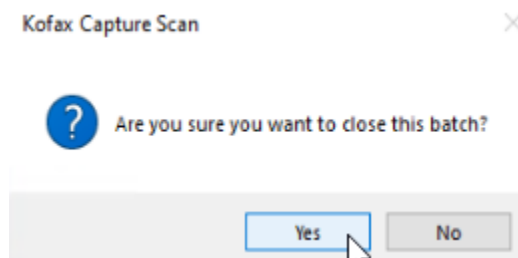


FileNet P8 Configuration Information

8. Once all documents have been scanned into the batch click the Close button.

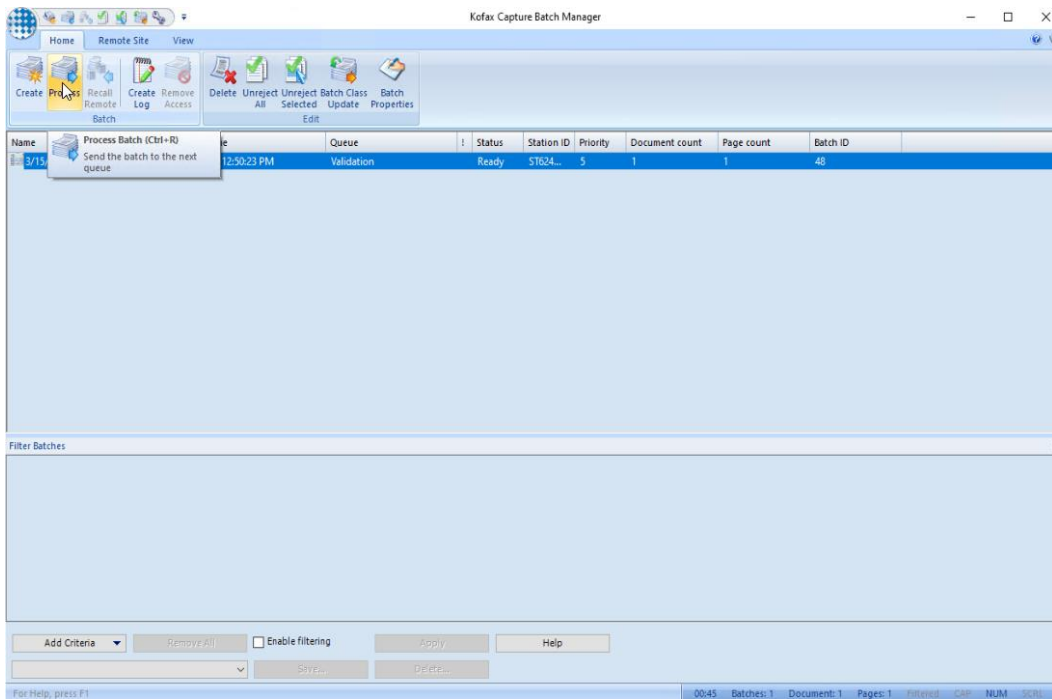


9. When prompted to close the batch click Yes.

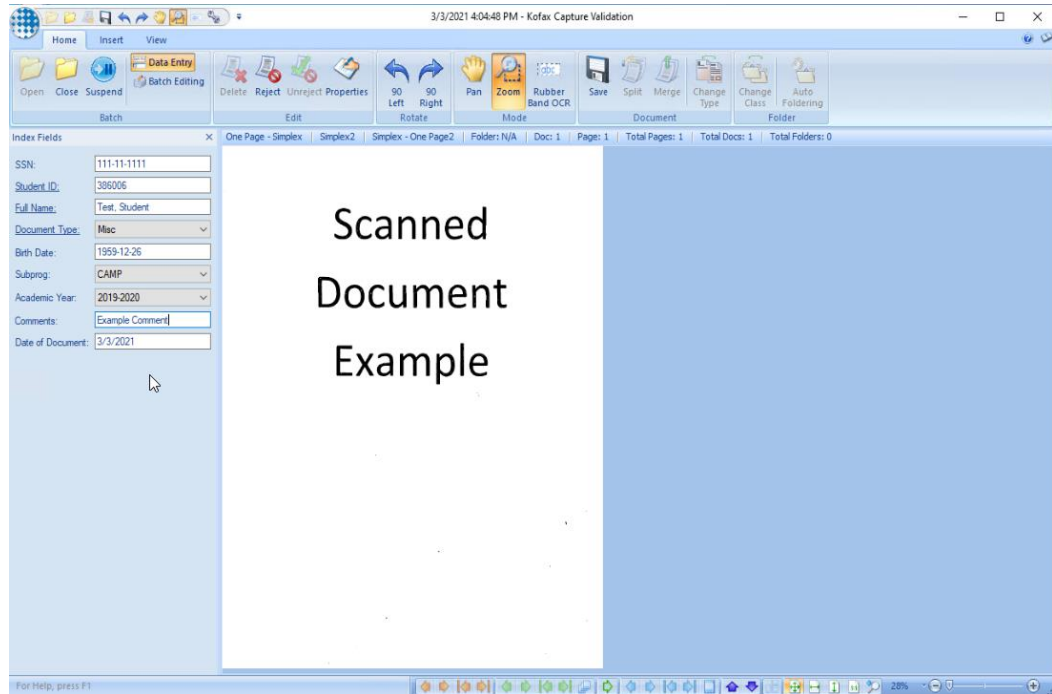


FileNet P8 Configuration Information

10. The document will now show that it is in the Validation queue. Select the batch to validate then click the Process button.

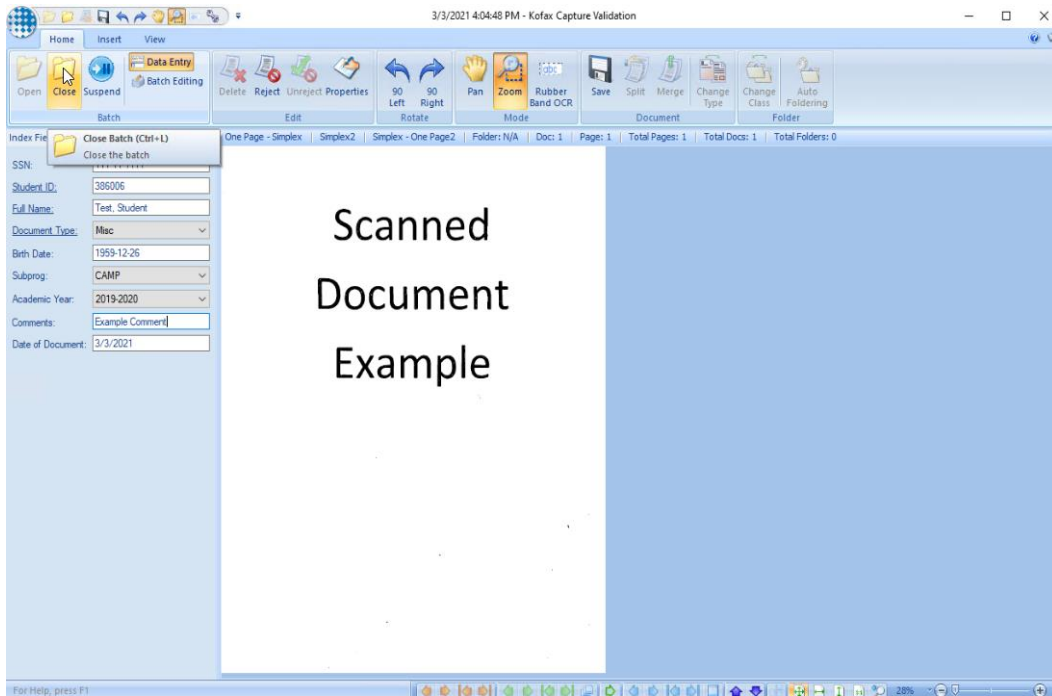


11. Enter all validation information.

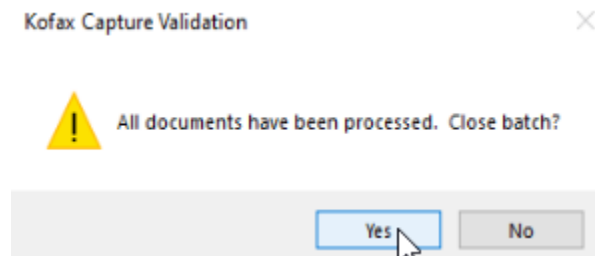


FileNet P8 Configuration Information

12. Click Close to close the batch.

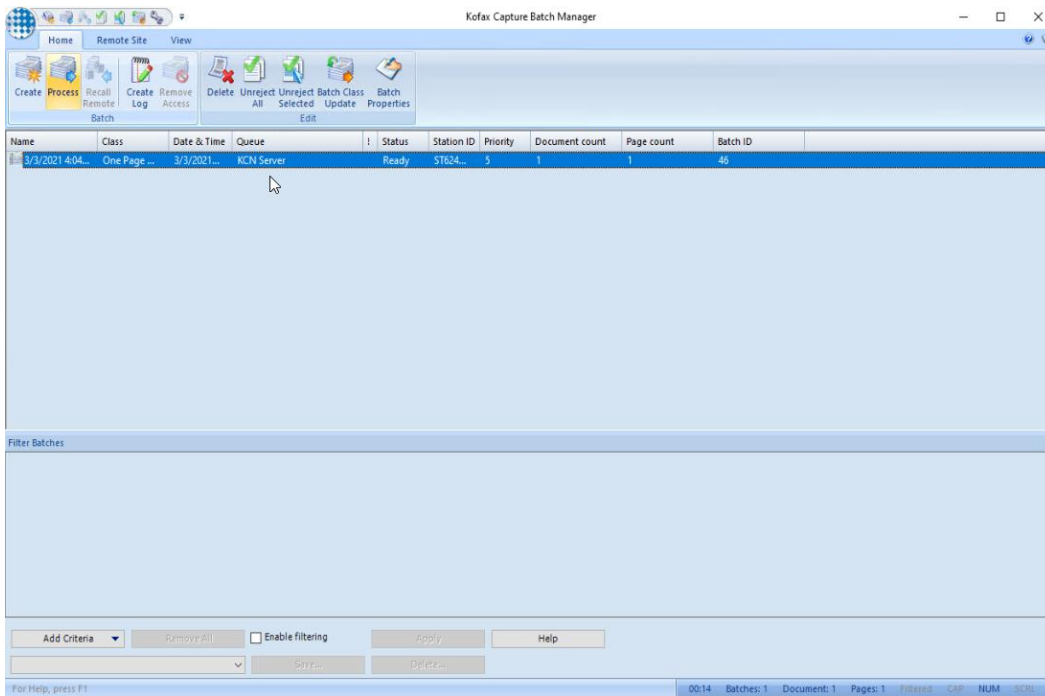


13. When prompted to close the batch click Yes.

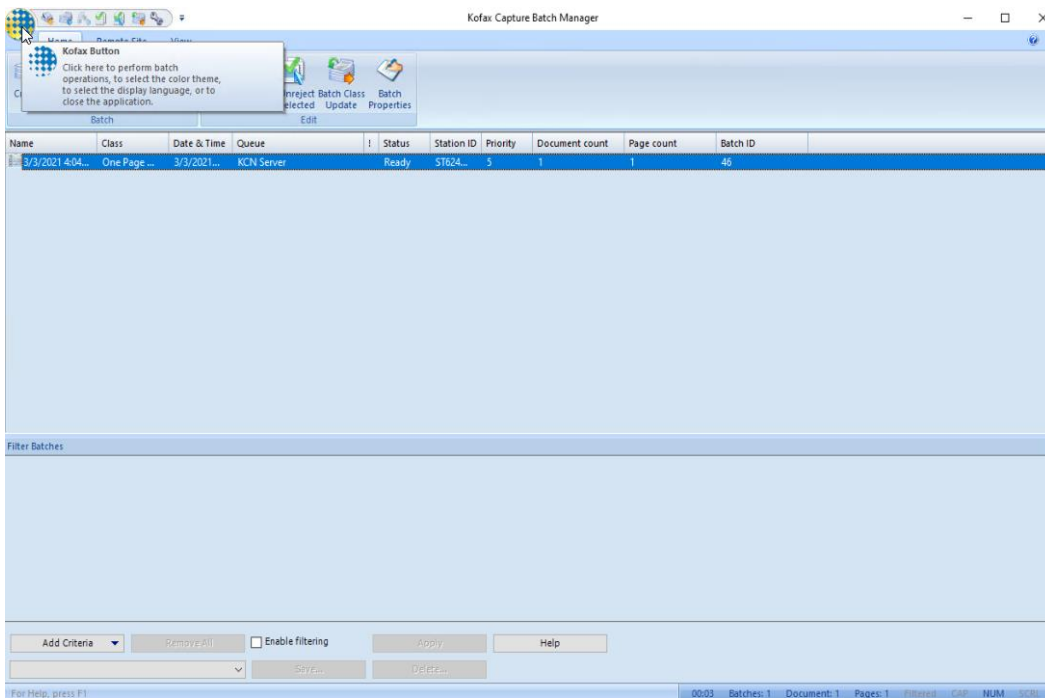


FileNet P8 Configuration Information

14. The batch will now be in the KCN Server queue which means that it's ready to be transferred to the server then into FileNet. It will be automatically uploaded or can be forced immediately by using the Remote Synchronization Agent described in the Remote Synchronization.

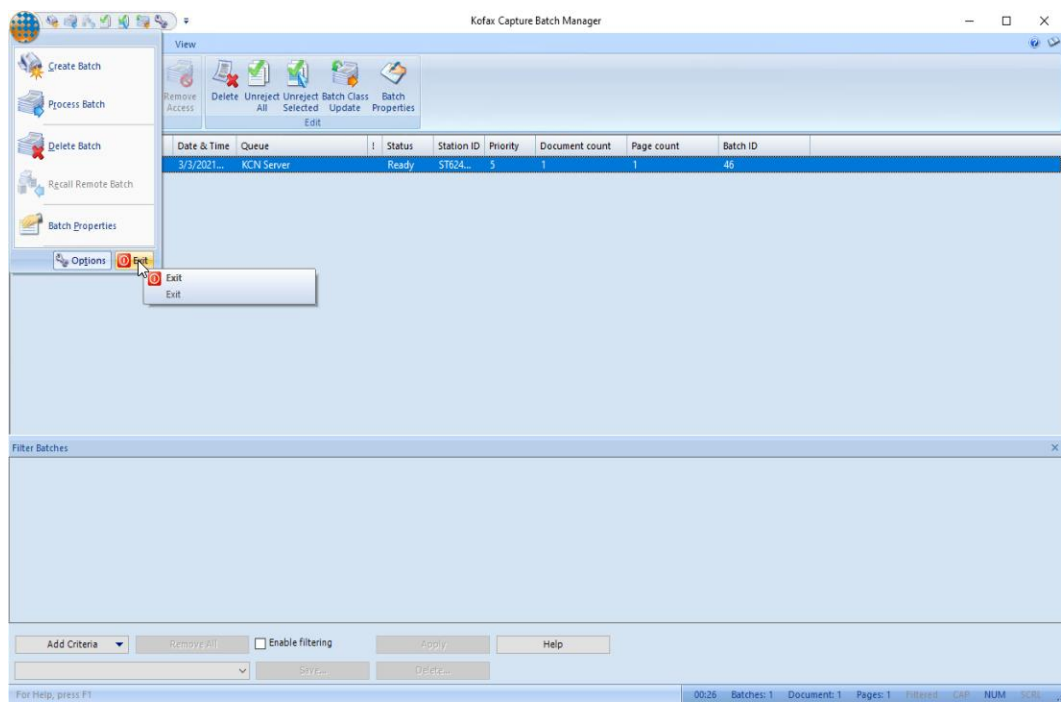


15. To exit click the Kofax Button.



FileNet P8 Configuration Information

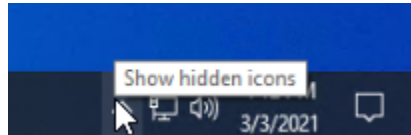
16. Click Exit on the dropdown menu.



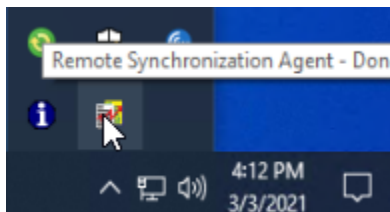
Remote Synchronization Agent (RSA)

The Remote Synchronization Agent (RSA) can be used to immediately transfer documents to the server so that they will be ingested into the FileNet system. It can also be used to renew the scan station license if you get a message stating that it's expired.

1. In the lower right of the Windows Desktop click the up arrow to show hidden icons.

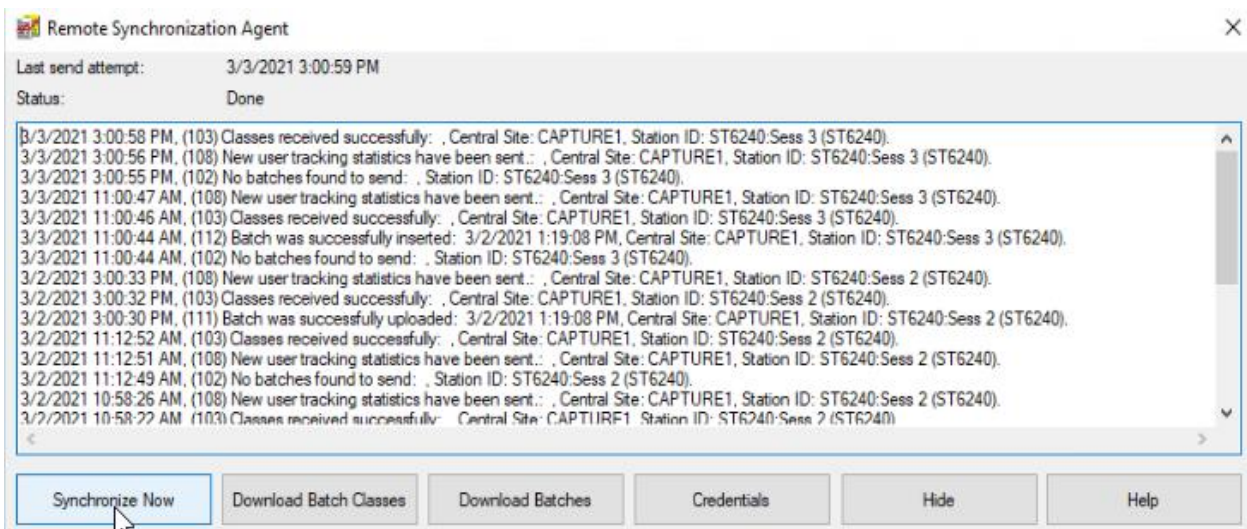


2. Doubleclick the Remote Synchronization icon to open it.



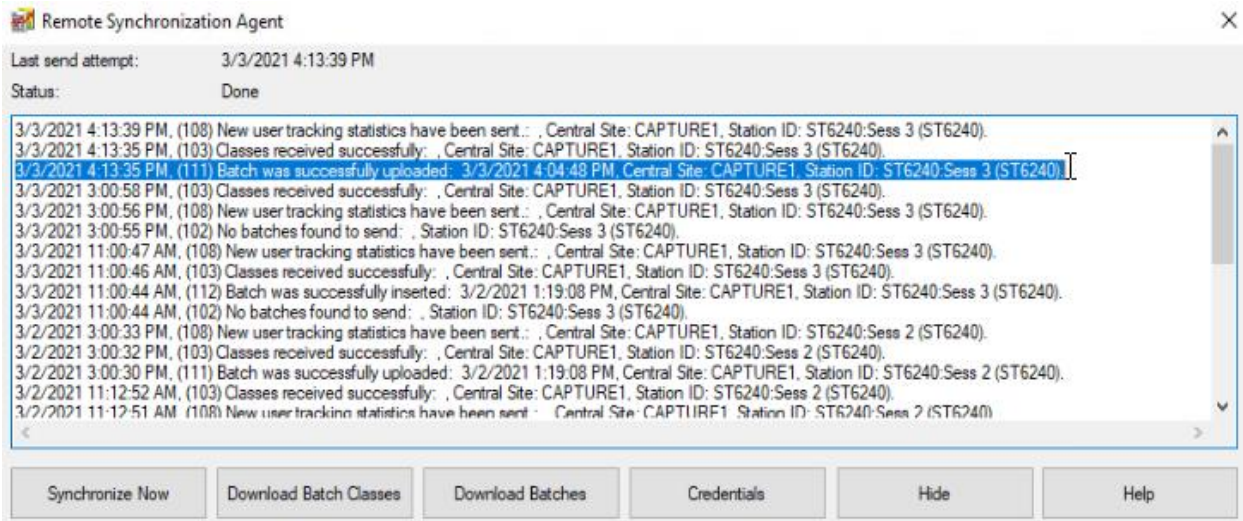
3. When the Remote Synchronization Agent window opens click the Synchronize Now button.

Note: This will also renew the scan station license if it's expired.



FileNet P8 Configuration Information

- Looking at the Remote Synchronization window verify that the batch or batches successfully uploaded.



- When the synchronization is complete the Status will be done. The window can now be closed by clicking the Hide button.

