





## Scanning Documents

**Kofax Capture Scanning Steps:**

1	Prepare the documents to be scanned. Sort by Document Type, Organization, single-sided versus duplex, page orientation, etc.
2	Print the necessary Bar Code Cover Pages. These can be printed as hard or soft copies. The soft copy version should be a .TIF file.
3	Create Batch – The Create Batch dialog box automatically opens upon login. If you have used another Kofax Capture component (Batch Manager, Administration, or Export), select Batch Menu > New or click the Create Batch icon. 
4	Update Batch Header information if necessary: <ul style="list-style-type: none"> <li>• Select <b>Batch Class</b> <ul style="list-style-type: none"> <li>○ Select <b>MarkView Document</b>, if scanning documents that will be exported directly to MarkView for processing.</li> <li>○ Select <b>MarkView Invoice</b>, if scanning documents that will be processed in KTM and exported to MarkView with captured data for ERP import.</li> </ul> </li> <li>• Modify <b>Batch Name</b> (only if necessary).</li> <li>• Enter Batch page and document count information if desired.</li> </ul>
5	Select the appropriate options in the Batch Fields section: <ul style="list-style-type: none"> <li>• Auto-Split <ul style="list-style-type: none"> <li>○ Select <b>True</b>, if scanning documents that have the same exact number of pages and are the same Document Type.</li> <li>○ Select <b>False</b> and use a Bar Code Cover page to separate each document.</li> </ul> </li> <li>• Auto Split Pages per Document: If Auto-split is True, list the specific number of pages in each document.</li> <li>• Discard Cover Page: Select True.</li> </ul>
6	Properly orient the documents, including the Bar Code Cover Pages, and place them on the scan bed.
7	Click the <b>Scan</b> button to begin scanning the batch. Or, click <b>OK</b> to scan a page at a time.
8	Review the images for legibility, proper orientation, and correct document splits.
9	When finished scanning, click the <b>Close Batch</b> icon or use the menu bar to close the batch. 
10	File the group of paper documents, according to your business practice.

## Importing Documents

**Kofax Capture Software Import Steps:**

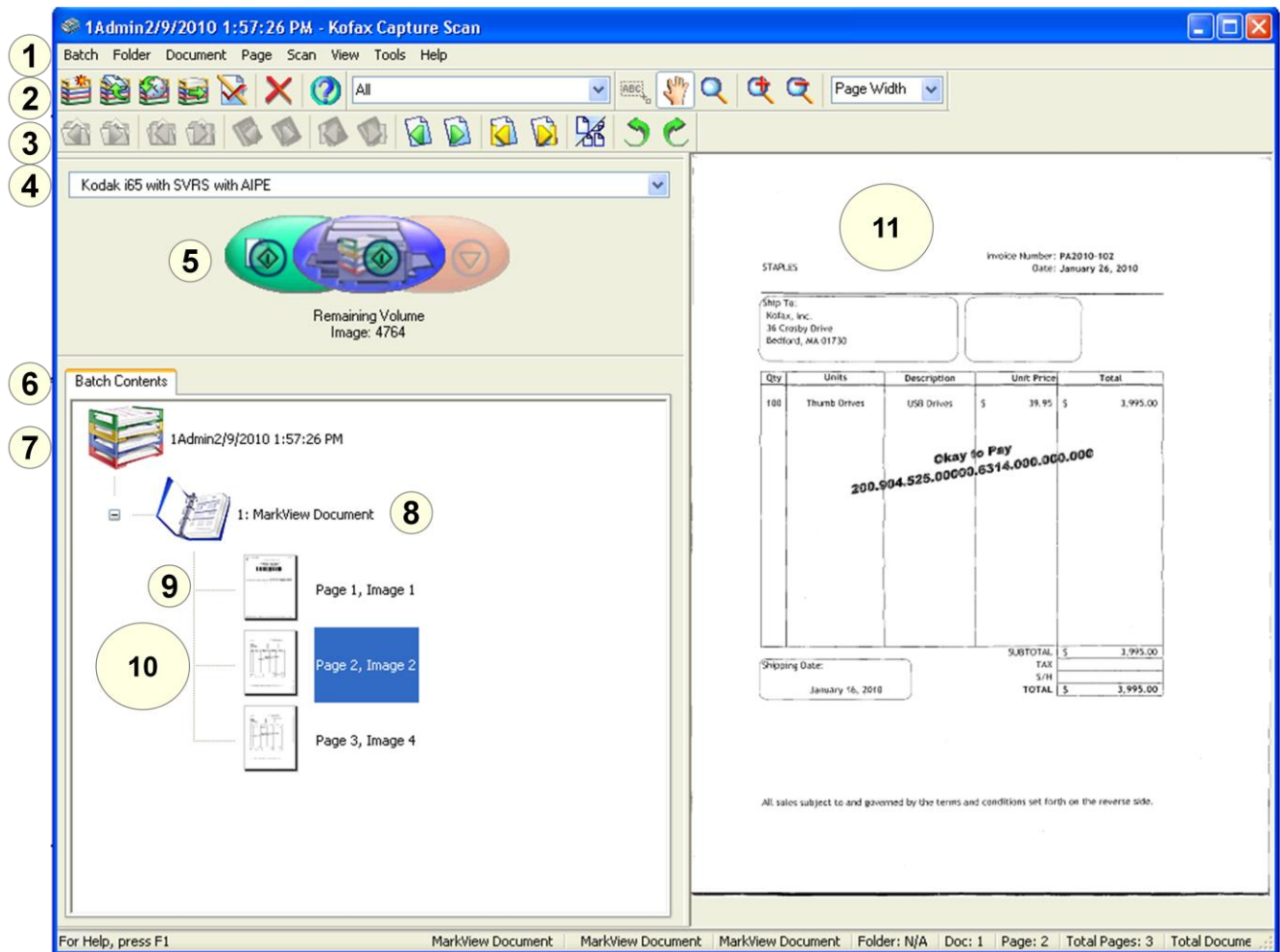
1	Identify and locate the documents to be imported. Sort by Document Type, Organization, single-sided versus duplex, page orientation, etc.
2	Print the necessary Bar Code Cover Pages. These can be printed as hard or soft copies. The soft copy version should be a .TIF file.
3	Create Batch – The Create Batch dialog box automatically opens upon login. If you have used another Kofax Capture component (Batch Manager, Administration, or Export), select Batch Menu > New or click the Create Batch icon. 
4	Update Batch Header information if necessary: <ul style="list-style-type: none"> <li>• Select <b>Batch Class</b> <ul style="list-style-type: none"> <li>○ Select <b>MarkView Document</b>, if scanning documents that will be exported directly to MarkView for processing.</li> <li>○ Select <b>MarkView Invoice</b>, if scanning documents that will be processed in KTM and exported to MarkView with captured data for ERP import.</li> </ul> </li> <li>• Modify <b>Batch Name</b> (only if necessary). Consider adding “– Software Import” to the end of the name.</li> <li>• Enter Batch page and document count information if desired.</li> </ul>
5	In the Create Batch dialog box , select the appropriate options in the Batch Fields section: <ul style="list-style-type: none"> <li>• Auto-Split <ul style="list-style-type: none"> <li>○ Select <b>True</b>, if scanning documents that have the same exact number of pages and are the same Document Type.</li> <li>○ Select <b>False</b> and use a Bar Code Cover page to separate each document.</li> </ul> </li> <li>• Auto Split Pages per Document: If Auto-split is “True,” list the specific number of pages in each document.</li> <li>• Discard Cover Page: Select True.</li> </ul>
6	Click <b>OK</b> to go to the Kofax Capture interface. In the Source field, select Software Import.
7	Click the scan batch icon and you will be prompted to locate the directory where your .PDF or .TIF files are saved.
8	Click the Add button if you have multiple files to import or Open when you have finished selecting the files.
9	Review the images for legibility, proper orientation, and correct document splits.
10	When finished scanning, click the <b>Close Batch</b> icon or use the menu bar to close the batch. 
11	Follow your business practice for saving the electronic.

## Creating a Batch

**Kofax Capture: Create Batch Interface**

- 1 **Batch Class:** Select MarkView Document, if scanning documents that will be exported directly to MarkView for processing. Select MarkView Invoice, if scanning documents that will be processed in KTM and exported to MarkView with captured data for ERP import..
- 2 **Batch Name:** Defaults from Batch Class settings, but can be modified at Scan. Capture Administrators can modify default Batch Name to include Scan UserID or Scan station ID, as part of the naming convention.
- 3 **Audit Field:** Series of optional data fields used for auditing purposes. If you populate the fields and there is a discrepancy between the actual number of documents or pages and the expected number of documents or pages, a “mismatch” dialog box will be displayed, when you close the batch.
- 4 **Auto Split:**
  - Select **True**, only if all documents are the same exact number of pages and are the same Document Type.
  - Select **False** and use Bar Code Cover Pages to separate each invoice. Using Bar Code Cover Pages as separators allows you to mix document types and Organizations in a single batch.
- 5 **Auto Split Pages Per Document:** Applies only if Auto Split is set to True.
- 6 **Discard Cover Page:** Should default to True. (Does not display when MarkView Invoice Batch Class is selected)
- 7 **Priority:** Determines the order in which the batches are released. There is no correlation between the batch priority and the document priority identified in the Bar Code Cover Page.
- 8 **Scan Button:** Starts scanning documents into batch. The **OK** button brings you to the Scan Panel.

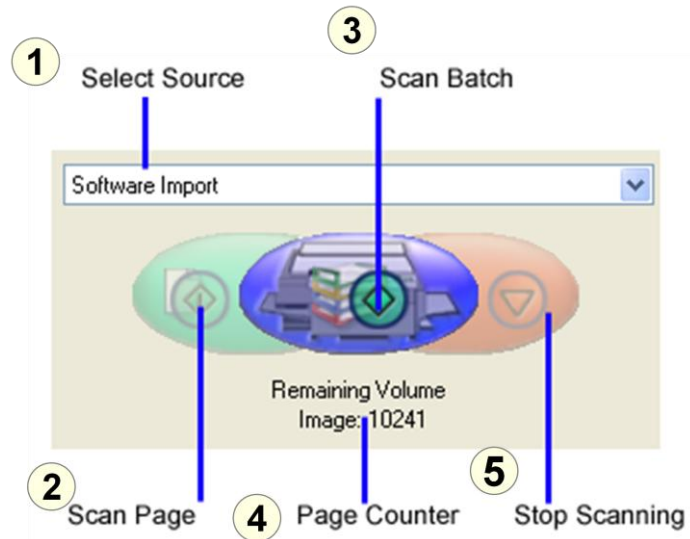
## Kofax Capture Scan Interface



### Kofax Capture Scan Interface:

- 1 **Menu Bar:** Allows access to major functions.
- 2 **Program Icons:** Allows quick access to batch operations.
- 3 **Image Navigation:** Moves from image to image. Allows change in orientation of images.
- 4 **Source Selection:** Select a valid scanner or the Software Import function.
- 5 **Scan Panel:** Manually scan batches, pages or stop scanning.
- 6 **Batch Contents Frame:** Displays relevant information associated with the batch.
- 7 **Batch Name:** Used to locate filed paper documents.
- 8 **Batch Class Doc Type:** Identifies MarkView Document or MarkView Invoice.
- 9 **Bar Code Cover Page:** Determines workflow processing path.
- 10 **Document Image Thumbnail:** Displays minimized image.
- 11 **Document Image:** Displays image of the selected page.

## Kofax Capture Scan Panel

**Kofax Capture Scan Panel**

- |   |   |
|---|---|
| 1 | <b>Select Source:</b> Select a valid scanner or the Software Import function          |
| 2 | <b>Scan Page:</b> Scan one page at a time   |
| 3 | <b>Scan Batch:</b> Scan all documents in a batch                                      |
| 4 | <b>Page Counter:</b> Indicates the number of remaining pages provided by your license |
| 5 | <b>Stop Scanning:</b> Stops the scanner   |