

Automating Kofax Capture Validation

Application Note

Date	June 21, 2012
Applies To	Kofax Capture 8.0, 9.0, 10.0
Summary	This application note provides the information needed to automate the Validation process.
Revision	1.0

Overview

It is possible to automate the Validation process in Kofax Capture to a large degree. This can be achieved through a combination of the configuration of the Capture Validation module along with the use of Validation (Index) Scripts, either .NET-based or SBL-based.

Automating the Validation process can help speed up the throughput of a Capture system, but note that Validation is designed to Validate the data associated with a document.

Improperly automating this process may allow invalid data to pass through and not be caught until Export (Release) or even after the documents have been successfully exported. It is the responsibility of the reseller, integrator and developers to properly automate the Validation process if they choose to do so.

This application note contains information on the requirements, configuration and steps needed to minimize the interaction of the Validation operators with Capture.

Requirements

To implement the following procedures, you must have a Kofax Capture Stand-Alone installation, a Capture client (workstation) installation or a Capture Server installation with client applications installed. Also, if using Visual Studio .NET for Validation (Index) Scripting, you must have the appropriate version of Visual Studio installed.

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Automating the Kofax Capture Validation Process

Setting up Capture to automatically process batches through Validation is a two-step process:

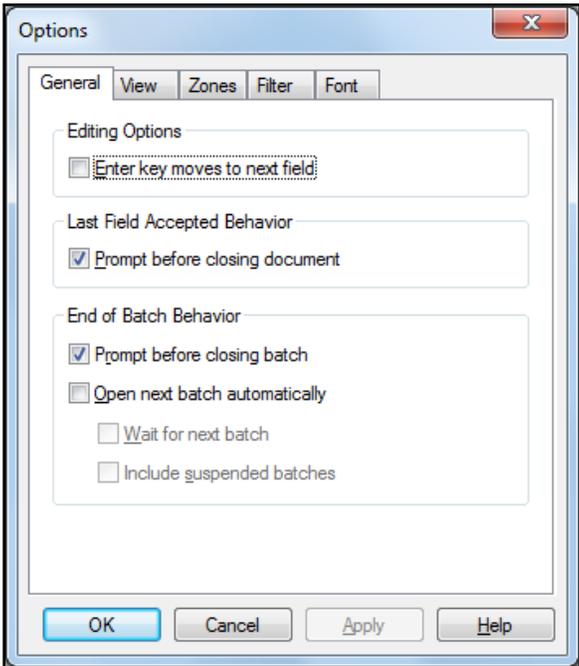
1. Configuring the Validation module to automatically open and close batches and close documents without user interaction.
2. Using a Validation Script to automatically accept a document or the value of an index field.

Setting Validation Too Automatically Open and Close Batches

By default, the Validation module is set up for the user to interactively select a batch. The Validation module can be configured so that batches are automatically opened and closed by the module. This is available from the Options dialog box under the Tool pulldown menu.

1. Open the Validation module.
2. Select Tools | Options from the menu.
3. Select the General tab.

The General tab contains the settings that set the Validation module's behavior when opening and closing batches along with closing a document. By default, Validation is set to prompt the user before closing the batch and to not automatically open the next batch. The default settings appear as:



Opening the Next Batch Automatically

The behavior of whether the user is allowed to select the next batch to process or if a batch is opened automatically is determined by the "Open next batch automatically" check box. This is unchecked by default. If unchecked, the user must manually select the next batch for processing.

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To eliminate the need for the user to manually select a batch, check (set) this checkbox. If checked, the module will automatically open the next batch. When a batch is closed, Validation will automatically open the next batch.

In previous versions of Capture, you were able to set the polling interval after setting the Open next batch automatically option. Beginning with Kofax Capture 8.x, after setting the Open next batch automatically option, you **MUST** also check (set) the Wait for next batch option.

Prompting for Closing the Batch

The behavior of whether to prompt the user to close the batch or not is determined by the "Prompt before closing batch" checkbox. This is checked by default. If checked, the user will be prompted to verify that they are closing the batch.

This step can be eliminated by unchecking this check box. If not checked, the user will not be prompted before the batch is closed.

Batches in Suspended State

An additional "Include suspended batches" check box is to set allow for batches in a Suspended state to be processed by the Validation module. If checked, batches in a Suspended state will be processed. If not checked, only batches in a Ready state will be opened. By default, this check box is not checked.

This setting has no direct effect on the automatic processing of batches.

Prompting for Closing the Document

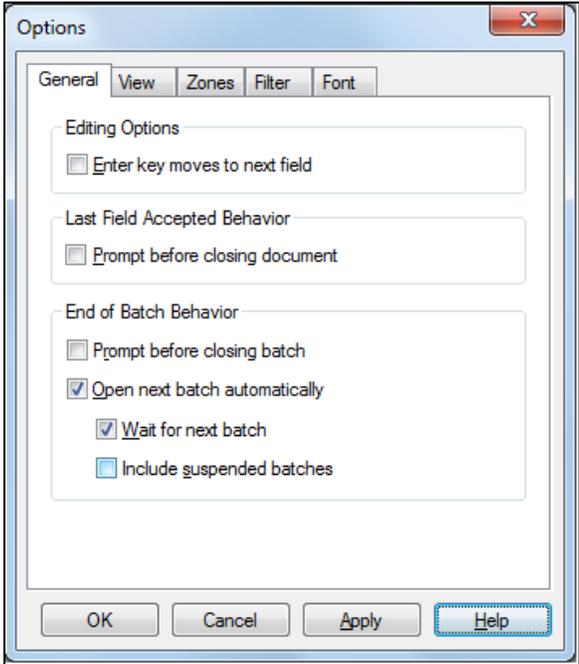
The behavior of whether to prompt the user to close the document or not is determined by the "Prompt before closing document" checkbox. This is checked by default. If checked, the user will be prompted to verify that they are closing the document.

This step can be eliminated by unchecking this check box. If not checked, the user will not be prompted before closing the document.

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Configuration of General tab under the Options Dialog

When configuring Validation to operate in an automated manner, the General tab in the Option dialog should appear as:



When Validation is configured in this manner, the module will automatically close batches without prompting the user. It will automatically open the next batch for processing and not prompt the user to manually select a batch for processing. Validation will also not prompt the user to confirm that the document is to be closed.

Though this automates the Validation module's ability to open and close batches and documents, Validation still requires the user to verify the contents, index field values. This step can be automated by varying degrees through the use of a Validation Script.

Scripting to Automatically Skip A Document Or Field

A complete description of Validation Scripting is beyond the scope of this application note. The instructions provided are simply those for the use of the "SaveAndSkipField" and "SaveAndSkipDocument" return codes with both SBL (Softbridge BASIC Language) based and .NET based Scripts to help automate this process.

WARNING: The Validation process is to validate the data associated with a document. The use of the "SaveAndSkip" return codes should be used carefully so that invalid data is not allowed to pass through the Validation module. This is the responsibility of the reseller, integrators and developers implementing this feature.

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SBL-Based Validation (Index) Script

The Validation Script can be automated through the implementation of the "SaveAndSkipField" and "SaveAndSkipDocument" return codes. This allows data to be validated without user intervention.

Please refer to the Softbridge Index Scripts for Ascent Capture Web page for additional examples of SBL, including the use of these features:

http://www.kofax.com/support/ascent/capture/downloads_softbridge.asp

SaveAndSkipField

This return code can be used to skip a field for processing. Below is an example of the template Pre field function associated with an Index Field. In this example, the name of the Index Field is "Name" which leads to the name of the function, "PreName()". Note the use of the "NoError" return code for this function.

```

-----
Function PreName() As Integer
  On Error GoTo Failure
  PreName = NoError
  Exit Function
Failure:
  PreName = FatalError
  Exit Function
End Function
----- Name validation: chec
----- to see if max length

```

This function allows the developer to take any actions necessary before the user is to validate the field. The "NoError" return code makes the field behave in the usual manner with the user accepting or entering data for the Index Field.

If the "SaveAndSkipField" return code is used in place of the "NoError" return code, Validation will skip this field, not allowing the user to interact with it. The existing data for this field will be saved and Validation will move to the next Index Field.

```

-----
Function PreName() As Integer
  On Error GoTo Failure
  PreName = SaveAndSkipField
  Exit Function
Failure:
  PreName = FatalError
  Exit Function
End Function
----- Name validation: chec
----- to see if max length

```

It is also possible to perform a similar function with the entire document through the use of the "SaveAndSkipDocument" return code.

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SaveAndSkipDocument

This return code can be used to skip the entire document for processing. Below is an example of the template Document Pre Process function found with all Validation Scripts. Note the use of the "NoError" return code for this function.

```
Function KfxDocPreProcess ( Id As Long, NumberOfPages As Integer, _
    AlreadyProcessed As Integer) As Integer
    On Error GoTo Failure

    If (AlreadyProcessed) Then
        KfxDocPreProcess = NoError
        Exit Function
    End If

    KfxDocPreProcess = NoError
    Exit Function

Failure:
    KfxDocPreProcess = FatalError
    Exit Function
End Function
```

This is the function is where any actions are to be taken before the user is able to validate the document as a whole. The "NoError" return code shows that no errors were encountered and allows the document to be processed.

If the "SaveAndSkipDocument" return code is used in place of the "NoError" return code, Validation will skip any validation of the fields associated with this document and not allow the user to interact with it. The existing data for this document will be saved and Validation will move to the next document.

```
Function KfxDocPreProcess ( Id As Long, NumberOfPages As Integer, _
    AlreadyProcessed As Integer) As Integer
    On Error GoTo Failure

    If (AlreadyProcessed) Then
        KfxDocPreProcess = SaveAndSkipField
        Exit Function
    End If

    KfxDocPreProcess = NoError
    Exit Function

Failure:
    KfxDocPreProcess = FatalError
    Exit Function
End Function
```

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.NET-Based Validation (Index) Script

The same features to save and skip fields and documents are available through .NET-based scripts, though the implementation is slightly different due to the different nature of the two environments.

Below are examples of the same examples from the SBL instructions applied in a .NET-based script.

SaveAndSkipField

The same return code is applied in a .NET-based Script to save and skip a field, but in a different format:

```
e.SkipMode = PreFieldEventArgs.SkipModeEnum.SaveAndSkipField
```

```
Private Sub First_FieldPreProcessing(sender As Object, e As Kofax.AscentCapture.Scripting.PreFieldEventArgs)
    e.SkipMode = PreFieldEventArgs.SkipModeEnum.SaveAndSkipField
End Sub
```

SaveAndSkipDocument

The return code for the Document Pre Process is slightly different. Instead of returning a "SaveAndSkipDocument", the value returned to the Capture Scripting object is:

```
e.SaveAndSkip = True
```

```
Private Sub Test__NET_DC_DocumentPreProcessing(sender As Object, e As Kofax.AscentCapture.Scripting.DocumentPreEventArgs)
    e.SaveAndSkip = True
End Sub
```

Summary

Using the techniques noted in this application note, it is possible to configure Kofax Capture to automate the Validation process and minimize user interaction. This document provides the information needed to speed up the Validation process through a combination of the configuration of Kofax Capture along with Validation Scripts.