

DocCopy Setup Guide

Automatic Document Duplicator for Kofax Capture

v1.3

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1 Overview

DocCopy for Kofax Capture is a utility which allows the automatic duplication of documents where multiple values are entered/detected in a field. These can be manually entered or automatically extracted index field values , or multiple rows entered in a TABLE field.

DocCopy can be configured to detect these multiple values, and create duplicates of the document, so that there is a document per value. The original multiple value field will be split and each document will have one of the values assigned. It is also possible to configure **DocCopy** to automatically copy across the values from all other index fields or table fields in the original document.

DocCopy is supported for Kofax Capture versions 8, 9 and 10.

1.1 New Features

The following new features have been added to **DocCopy** from version 1.3

- Ability to specify multiple RunAfter modules, meaning DocCopy can be run more than once if required.
- Ability to copy the Kofax generated PDF file when creating a new document.

2 Installation

As with any custom component, you should test thoroughly in a non-production system before using in a live environment, and always take a full back up of ALL existing Kofax configuration before applying changes.

2.1 Requirements

DocCopy requires an installed version (client, server or standalone) of Kofax Capture v8, v9, or v10.

.NET Framework 3.5 is required on all machines which will process **DocCopy** batches.

2.2 Install DocCopy Components on Standalone System or Server

Unzip DocCopy.zip and copy **DocCopy.dll** and **DocCopy.AEX** to the *<Kofax Capture Install Path>\Bin* directory

In Kofax Capture Administration, select **Tools > Workflow Agents > Add** and browse to **DocCopy.AEX** to add the workflow agent to the system

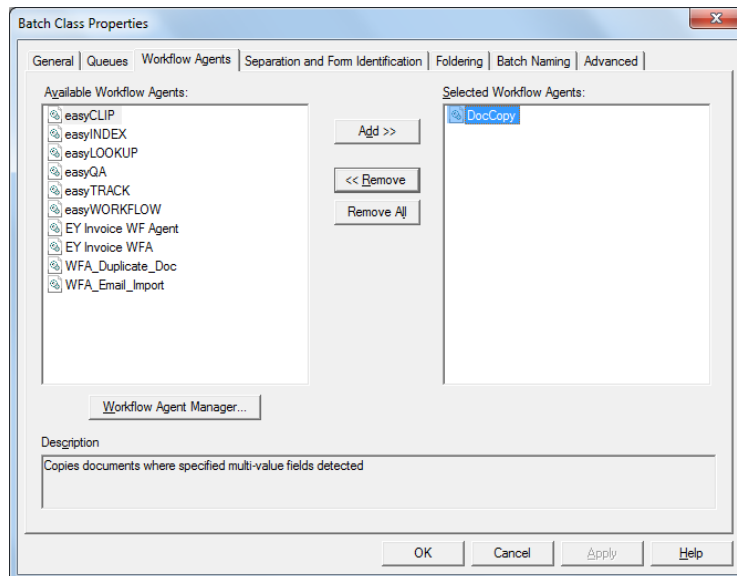
2.3 Install DocCopy Components on Workstations

For any workstations where you want to run **DocCopy**, you must perform the steps in 2.2 to install the Workflow Agent. However, you do not need to add the workflow agent again in Administration.

In some cases it may be necessary to manually register **DocCopy.dll** on workstations – see section 5.2 for details.

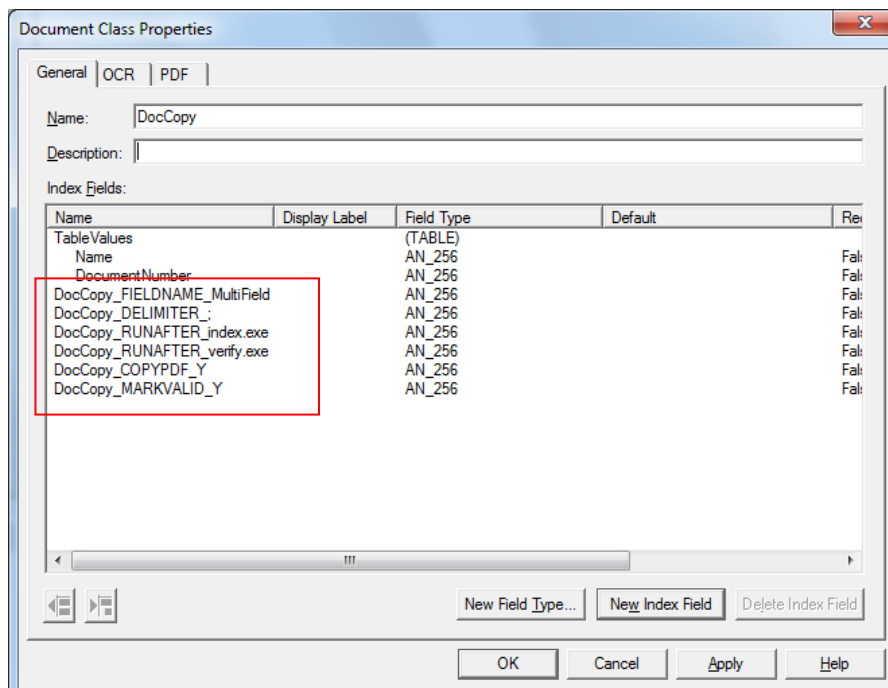
3 Configuration

Once **DocCopy** is installed, you need to add it to any batch classes which require it.



3.1 Trigger Fields

For each Document Class where you want to use **DocCopy**, you need to create some trigger fields at the Document Class level. These fields can be hidden, and do not need to be linked at the release stage. They do not have to have values, and can be of any field type.



You may be prompted to add these fields to any configured release scripts. This can be ignored.

3.1.1 FIELDNAME

DocCopy_FIELDNAME_*the multi-value fieldname*

Eg DocCopy_FIELDNAME_CustomerID

When using a TABLE field, the name of the TABLE must be specified.

3.1.2 DELIMITER

DocCopy_DELIMITER_*the delimiter*

Eg DocCopy_DELIMITER_;

This field is only required if the multi-value field is a standard Index field. If you are using a TABLE field, no delimiter is required.

3.1.3 RUNAFTER

DocCopy_RUNAFTER_*the module to run DocCopy after*

Multiple modules can be defined by adding multiple entries:

Eg DocCopy_RUNAFTER_index.exe
DocCopy_RUNAFTER_verify.exe

Scan	scan.exe	Recognition	fp.exe
Validation	index.exe	Verification	verify.exe
OCR Full Text	ocr.exe	PDF Generator	kfxpdf.exe

NB If DocCopy is run after Full Text OCR it will not copy the Full Text OCR files, only the image files and PDF. Therefore it is recommended to run **DocCopy** before Full Text OCR.

3.1.4 COPYFIELDS

DocCopy_COPYFIELDS_Y

This trigger is only required if you want to copy ALL index field values from the original document. If you do not want to copy these values, do not create this trigger field.

3.1.5 MARKVALID

DocCopy_MARKVALID_Y

This trigger determines whether the copied documents will be marked as valid automatically. For example, if you run **DocCopy** after Recognition, you may want to mark as valid. If you do not want to mark valid, do not create this trigger field.

Marking a document valid means that it will not have to be manually checked in Validation. If you run **DocCopy** after Validation, this trigger is ignored.

3.1.6 COPYPDF

DocCopy_COPYPDF_Y

This trigger will allow the PDF generated by Kofax to be copied with the new image.

3.2 General

Settings can be different for each Document Class if required, and you do not need to configure settings for every Document Class if you do not require them.

Once configured, you will need to re-publish the batch class.

4 Processing Batches

During batch processing each document will be checked for **DocCopy** settings, and where they are detected, the index field or TABLE specified will be checked for data.

4.1 Standard Index Fields

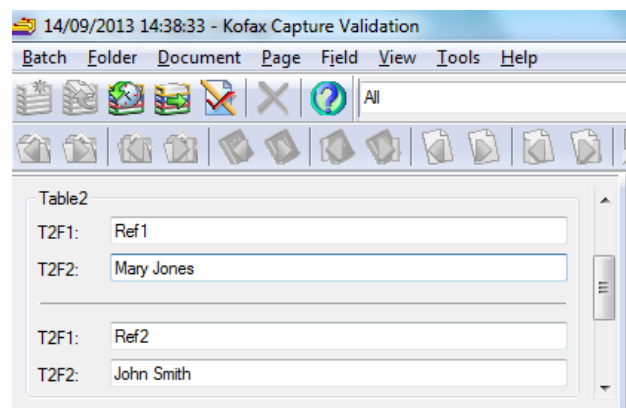
In the case of a standard index field, the delimiter will be used to determine how many values are in the field, and the appropriate number of copies will be made.

For example if the delimiter is ; and the field contains **Ref1;Ref2;Ref3** then 2 copies will be made of the document, and the values in the index fields for these will be:

Document 1 (original)	Ref1
Document 2 (copy)	Ref2
Document 3 (copy)	Ref3

4.2 TABLE Fields

Where the multi-value field is a TABLE field, the number of rows in the table will determine how many copies are made.



In the example above, a single copy will be made of the document, and the values in the TABLE fields for the documents will be:

Document 1 (original)	Ref1	Mary Jones
Document 2 (copy)	Ref2	John Smith

5 General Considerations

As with any custom component, you should test thoroughly in a non-production system before using in a live environment, and always take a full back up of ALL existing Kofax configuration before applying changes.

5.1 Workflow Agent Skip if Cannot Load

An option exists in Kofax workflow agents to skip if not loaded. This option can be set to TRUE or FALSE.

If set to TRUE, if a workstation processes a batch but does not have **DocCopy** installed, it will just ignore the settings.

If set to FALSE, if a workstation processes a batch but does not have **DocCopy** installed, it will cause an error and the batch will be sent to Quality Control.

By default **DocCopy** is set to TRUE. If it is required to set this to FALSE, then the **DocCopy.AEX** file needs to be edited so that the highlighted line reads FALSE instead of TRUE. **DocCopy** then has to be re-registered via Workflow Agent Manager in the Administration module. **No other changes must be made to DocCopy.aex**

```
[Workflow Agents]
DocCopy
```

```
[DocCopy]
WorkflowAgentID=DocCopy
WorkflowAgentProgID=DocCopy
WorkflowAgentFile=DocCopy.dll
Description=Copies documents where specified multi-value fields detected
Version=1.3
SupportsNonImageFiles=True
WorkflowAgentSkipIfCantLoad=True
```

5.2 Manual Registration of DocCopy.dll

DocCopy needs to be copied to any machine where it will run. For example, if you have specified DocCopy_RUNAFTER_index.exe, then it needs to be copied to any workstation that will run Validation for the configured Batch Class.

To do this, on each machine, open a command window using **Start > Command**

Run the following command:

```
<WindowsRoot>\Microsoft.NET\Framework\v2.0.50727\regasm.exe
"<KofaxCaptureInstallPath>\Bin\DocCopy.dll"
```

Where *<WindowsRoot>* is the root install path for Windows – usually *C:\Windows*
Where *<KofaxCaptureInstallPath>* is the Kofax installation path – for example
C:\Program Files\Kofax\Capture

Example:

```
C:\Windows\Microsoft.NET\Framework\v2.0.50727\regasm.exe "C:\Program
Files\Kofax\Capture\Bin\DocCopy.dll"
```

NB for Kofax Capture 10.1 and higher you may need to use the v4.0.30319 REGASM

5.3 Running Processes Multiple Times

It is possible that other workflow agents, or manual actions can force a batch into the same module or status more than once. This can cause unpredictable outcomes, and it is advised that **DocCopy** is tested fully with all other scripts/agents before using in a live environment.

5.4 Limitations

If DocCopy is run after OCR/PDF it will not copy the OCR/PDF files, only the image files. Therefore it is recommended to run DocCopy after Recognition, Validation or Verification and before OCR/PDF.

6 Contact

For support and assistance please contact mail@davidcrewe.com