

# easyBatchSplitter Setup Guide

Code-Free Custom Batch Splitting Utility for Kofax Capture

Version 1.0.5

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## 1 Overview

This guide is intended to show how to install and configure **easyBatchSplitter** for Kofax Capture.

It assumes a working knowledge of Kofax Capture batch class setup and an understanding of the standard Kofax workflow process.

**easyBatchSplitter** is supported for Kofax Capture version 9, 10, 11

### 1.1 New Features

#### 1.0.5

It is now possible to stop batches been processed multiple times by easyBatchSplitter, and stop newly created batches from being processed if required.

### 1.2 Fixed Issues v1.0.4

#### KIC & Custom Storage Strings

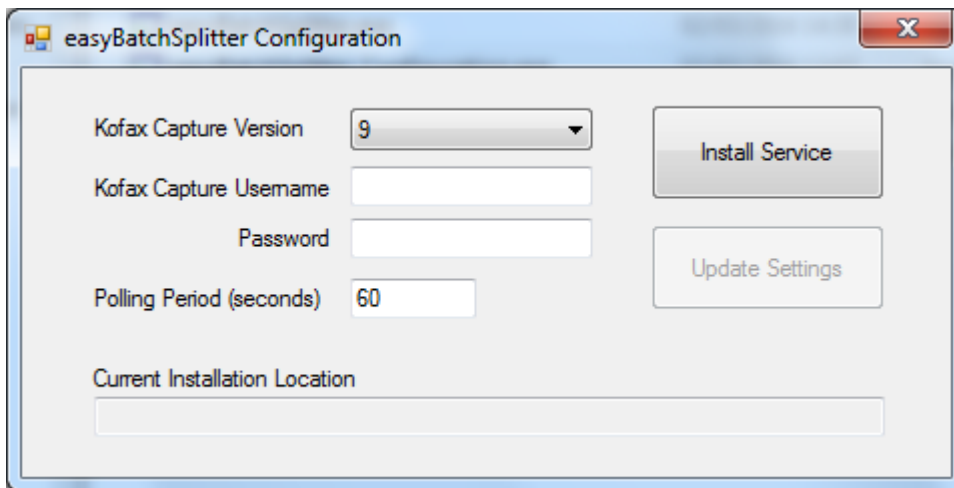
When splitting batches created via Kofax Import Connector, or where batches contain documents with custom storage strings, an error was encountered when creating new documents.

## 2 Installation

### 2.1 Install easyBatchSplitter Service

To install **easyBatchSplitter** follow the steps below:

-Unzip the **easyBatchSplitter.zip** file and run **easyBatchSplitter\_Configuration.exe** (NB use run as Administrator).



-Select the correct version of Kofax Capture.

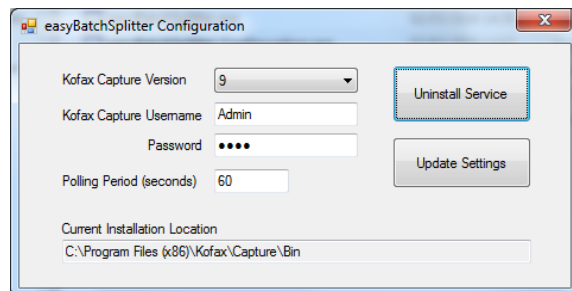
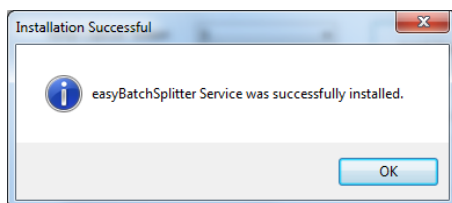
-Enter Kofax Capture user profile credentials if User Profiles are enabled.

-Enter a polling period for the easyBatchSplitter service.

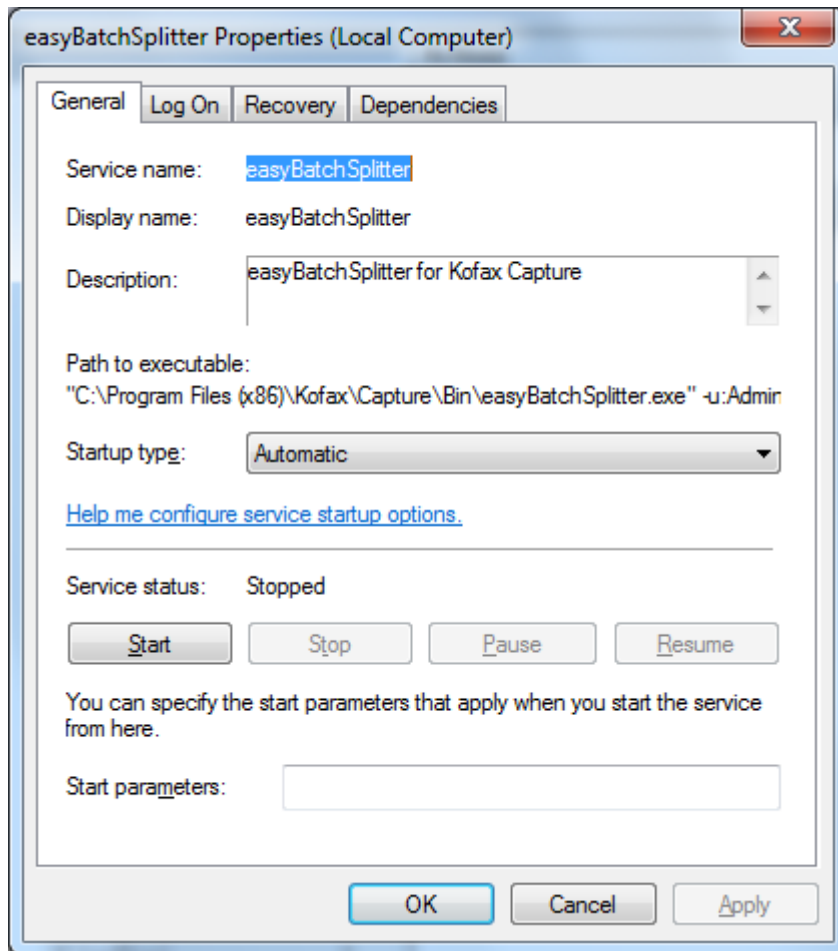
-Select Install Service.

-Select the installation path. It is recommended to use the <Kofax Install Path>\Bin folder as the installation folder (usually C:\Program Files\Kofax\Capture\Bin or similar).

NB. If you choose a different path you will need to manually edit the easyBatchSplitter.AEX file to include the full path before registering easyBatchSplitter with Kofax Capture.



Once installed you will need to set any specific Service Log On and Startup type, and start the service.



-In the Kofax Capture Administration module, select Tools>Custom Module Manager and Add

-Browse to the **easyBatchSplitter.AEX** file and select it

-Select **easyBatchSplitter** and Install

**easyBatchSplitter** should now be installed and ready for use.

## 2.2 Update Service Settings

To change the Kofax Capture user profile used for easyBatchSplitter processing, or to change the polling period run **easyBatchSplitter\_Configuration.exe** and make relevant changes then click Update Settings.

These changes will take effect when the service is restarted.

### 2.3 Uninstall easyBatchSplitter Service

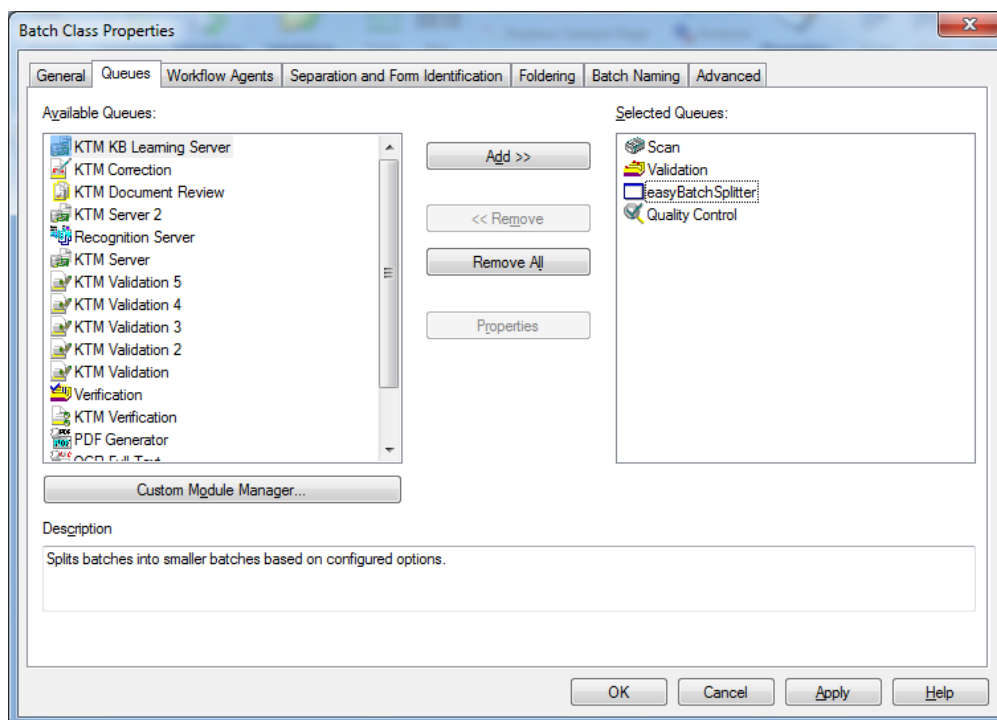
To uninstall, run **easyBatchSplitter\_Configuration.exe** and select Uninstall Service.

Then use Tools>Custom Modules Manager in Administration module to remove from Kofax Capture.

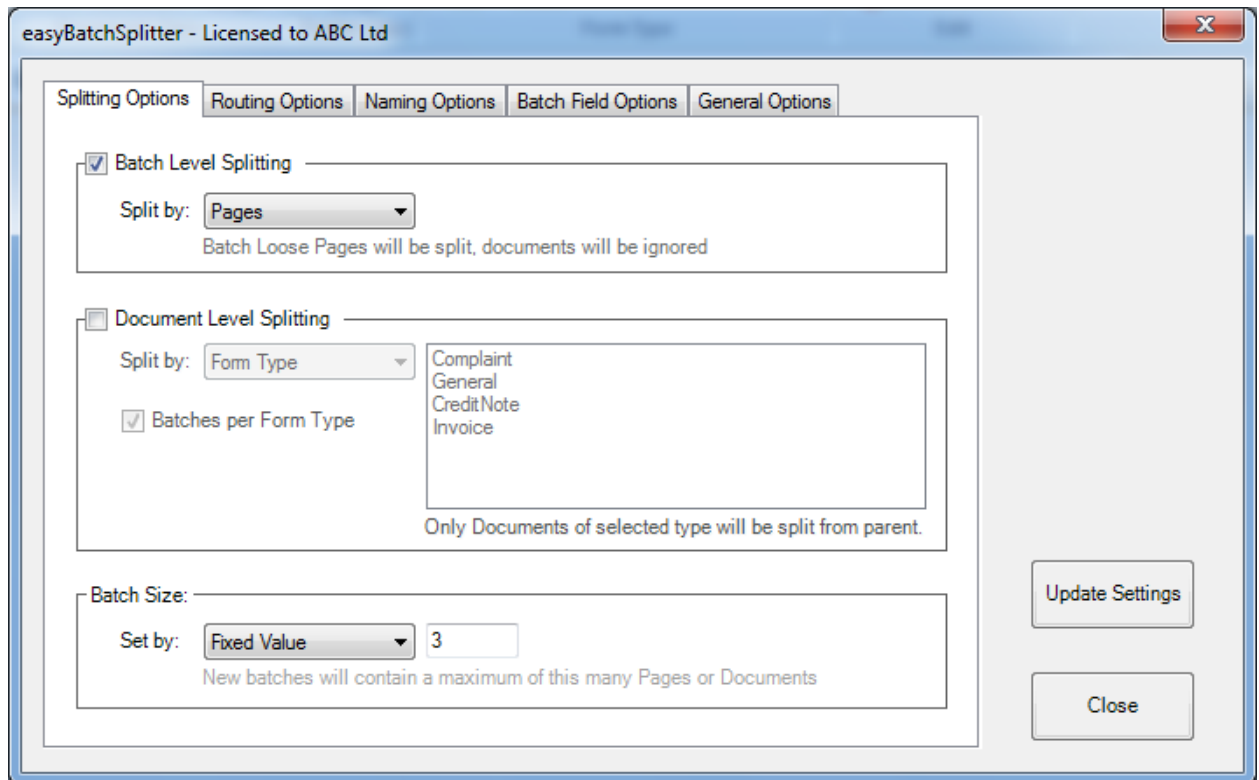
## 3 Configuration

### 3.1 Adding easyBatchSplitter to a Batch Class

To add **easyBatchSplitter** to a Batch Class, select the Queues tab from the Batch Class properties, and add **easyBatchSplitter** where required in the Selected Queues list.

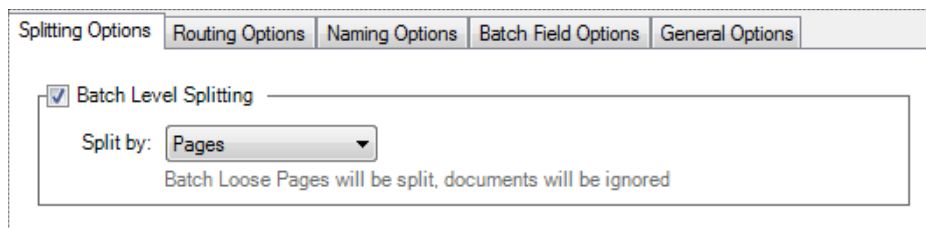


Once **easyBatchSplitter** has been added to a Batch Class, right-clicking on the Batch Class will show the **easyBatchSplitter Properties** menu item.



## 3.2 Splitting Options

### 3.2.1 Batch Level Splitting



If **Batch Level Splitting** is selected, then batches are split either by Pages or Documents – regardless of Document Class or Form Type.

When **Pages** is selected, a new batch will be created for every **n** pages (where n is the number specified for Batch Size).

When **Documents** is selected, a new batch will be created for every **n** documents (where n is the number specified for Batch Size). When using this type of splitting, unclassified documents can be moved to any target batch class. However, documents which have already been identified and have an assigned Form Type must only be sent to a Batch Class using the relevant Form Type.

It is possible to use a Batch Field to determine the splitting type. This field must contain the word **Pages** or **Documents** at the time **easyBatchSplitter** runs.

Splitting Options | Routing Options | Naming Options | **Batch Field Options** | General Options

Batch Level Splitting

Split by: Batch Field | Split Type

Selected batch field must contain either 'Pages' or 'Documents'

### 3.2.2 Document Level Splitting

Document Level Splitting

Split by: Form Type

Batches per Form Type

Complaint  
General  
Credit Note  
Invoice

Only Documents of selected type will be split from parent.

When selecting **Document Level Splitting**, it is possible to specify whether to split by Form Type or Document Class.

Whichever method is selected, it is then possible to select which Document Classes or Form Types will be split. It is not necessary to split every type.

During **easyBatchSplitter** processing only those documents of the selected types will be split out from the original batch.

A new batch will be created every **n** documents (where n is the number specified for Batch Size). All other documents not in the specified type list will be left in the original batch.

#### 3.2.2.1 Batches Per Type

Document Level Splitting

Split by: Document Class

Batches per Document Class

Correspondence  
Finance

Only Documents of selected type will be split from parent.

When using **Document Level Splitting**, and selected types, it is also possible to specify that there should be batches created per type.



When this option is selected, during processing all documents which are in the selected types list will be split. All split documents of the same type will be put together in the same batch.

For example if the settings above were used on a batch with the following documents:

Original Batch

- Correspondence
- Finance
- Finance
- Correspondence
- Finance

You could create 2 new batches which would have the following documents:

Batch1

- Correspondence
- Correspondence

Batch2

- Finance
- Finance
- Finance

### 3.2.3 Batch Size

The size of new batches is determined either by a fixed value specified at setup time, or via a Batch Field.

Batch Size:

Set by:

New batches will contain a maximum of this many Pages or Documents

Batch Size:

Set by:

Selected batch field must contain a valid number

### 3.3 Routing Options

#### 3.3.1 Standard

When not using **Batches Per Document Class** or **Batches Per Form Type**, routing of new batches is configured as shown below:

The screenshot shows the 'easyBatchSplitter - Licensed to ABC Ltd' window with the 'Routing Options' tab selected. The 'New Batch Routing' section is highlighted with a white border. It contains three rows of dropdown menus:

- Class:** Index Field (selected), NewClass (selected). Below the dropdowns, it says: "Selected index field must contain a valid batch class name" and "Only suitable for single document batches".
- Module:** Fixed Value (selected), Validation (selected). Below the dropdowns, it says: "New batches will be routed to selected module" and "Must be a valid module for intended batch class".
- Status:** Fixed Value (selected), Ready (selected). Below the dropdowns, it says: "New batches will be routed with selected status".

Below the 'New Batch Routing' section is the 'Multiple Processing' section, which contains two unchecked checkboxes:

- Do not process batches multiple times
- Do not process batches created by easyBatchSplitter

On the right side of the window, there are two buttons: 'Update Settings' and 'Close'.

The new Batch Class, Module, and Status can all be set either as a Fixed Value, or by Batch Field or Index Field.

**NB.** Index field settings are only suitable for **Document Level Splitting**, and for single document batches.

### 3.3.2 Per Type

When using **Batches Per Document Class** or **Batches Per Form Type** the new batch routing is configured as below:

easyBatchSplitter - Licensed to ABC Ltd

Splitting Options Routing Options Naming Options Batch Field Options General Options

New Batch Routing

Document Class	Batch Class	Module	Status
Correspondence	Correspondence	Validation	Ready
FinanceDocs	Finance	Validation	Ready

Multiple Processing

Do not process batches multiple times

Do not process batches created by easyBatchSplitter

Update Settings

Close

For each selected type you must choose the target Batch Class, Module and Status.

### 3.3.3 Multiple Processing

Multiple Processing

Do not process batches multiple times

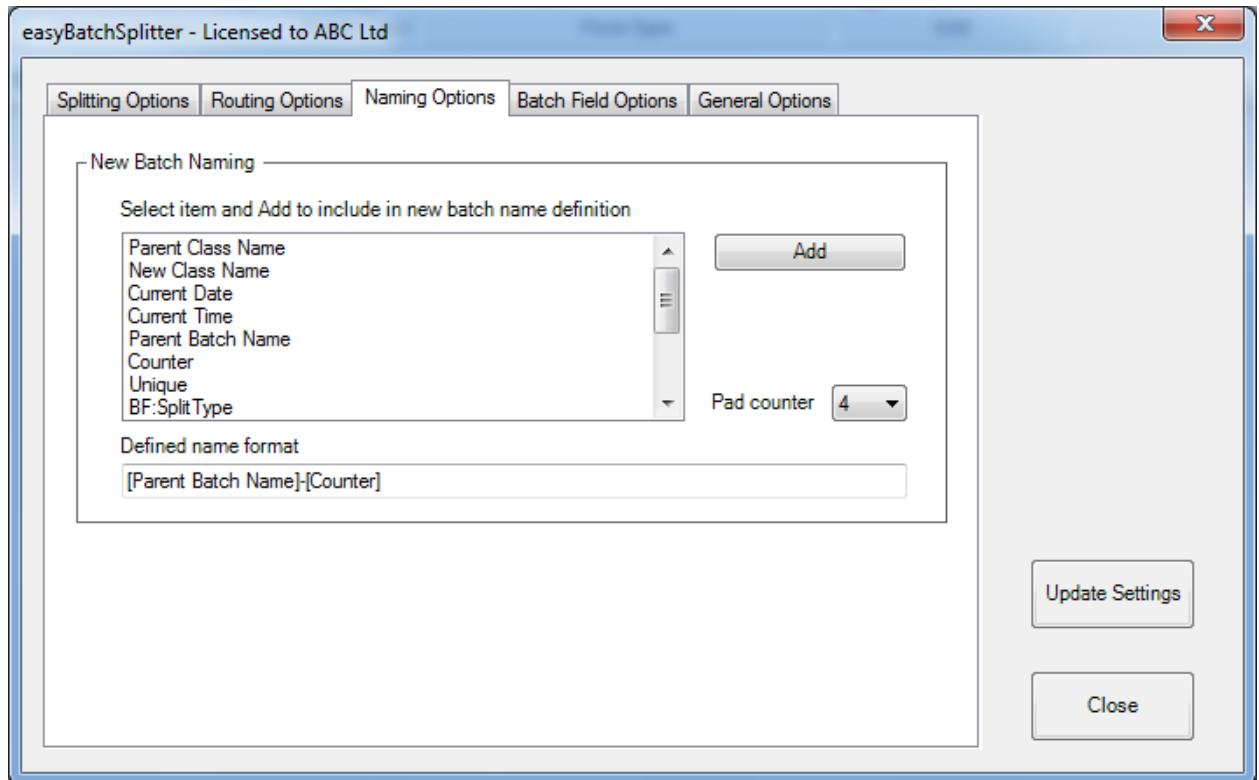
Do not process batches created by easyBatchSplitter

If you re-route batches manually, or they are re-routed through the use of Quality Control, or custom routing they may end up being sent to easyBatchSplitter multiple times.

If you do not want batches to be re-processed you can select to not process batches which were created by easyBatchSplitter, or those which have already been processed.

### 3.4 Naming Options

New batches can be named using a combination of text, batch fields, counters, and system values.



Select a value from the list and click **Add** to add it to the **Defined Name Format** field. Manually enter extra characters if required.

To avoid duplicate name generation, there are two values which should allow unique names to be generated in conjunction with other system values.

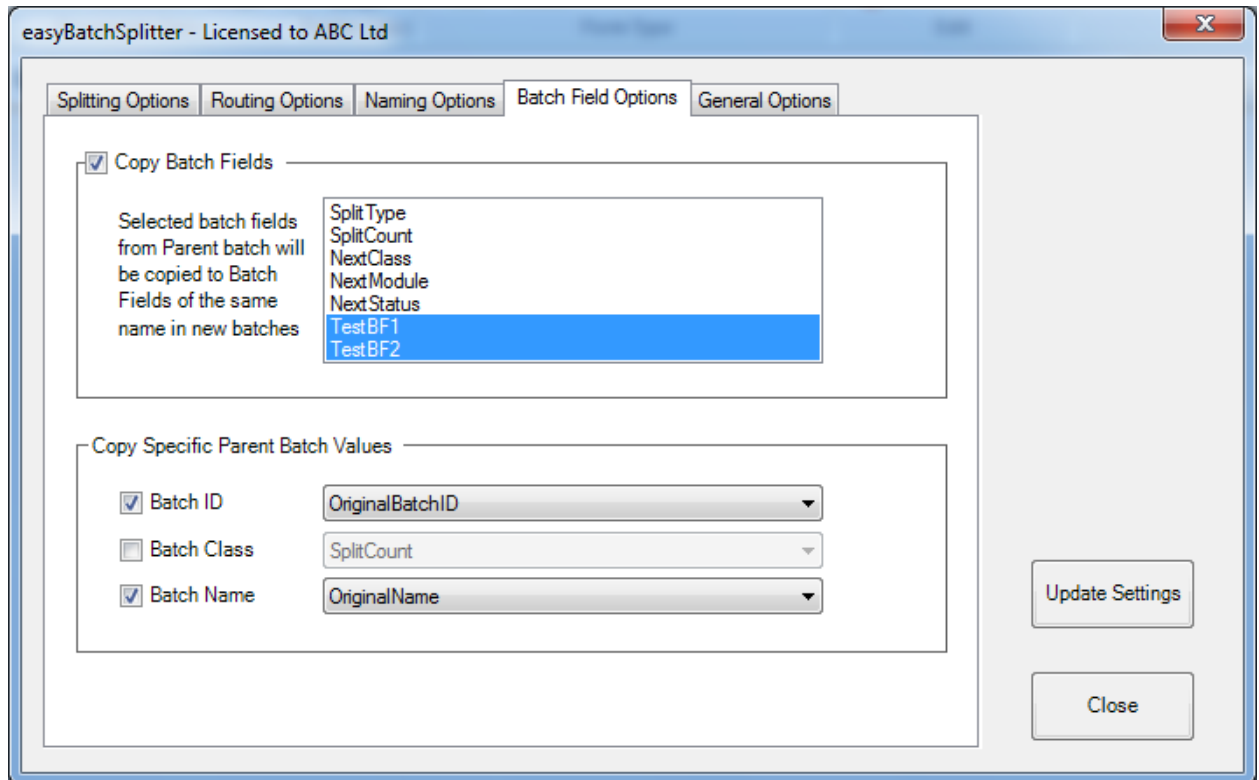
**Counter** sequential count of the new batches created by **easyBatchSplitter** for any given batch.

**Unique** semi-random number generated at run time.

Pad counter determines the length of both Counter and Unique. For Counter the value will be padded with zeroes to the selected length, and for Unique, the number generated will be of the set length.

### 3.5 Batch Field Options

#### 3.5.1 Copy Batch Fields



When creating new batches, it is possible to copy Batch Field values from the original batch to new batches. All available batch fields from the original batch class are shown, and can be selected.

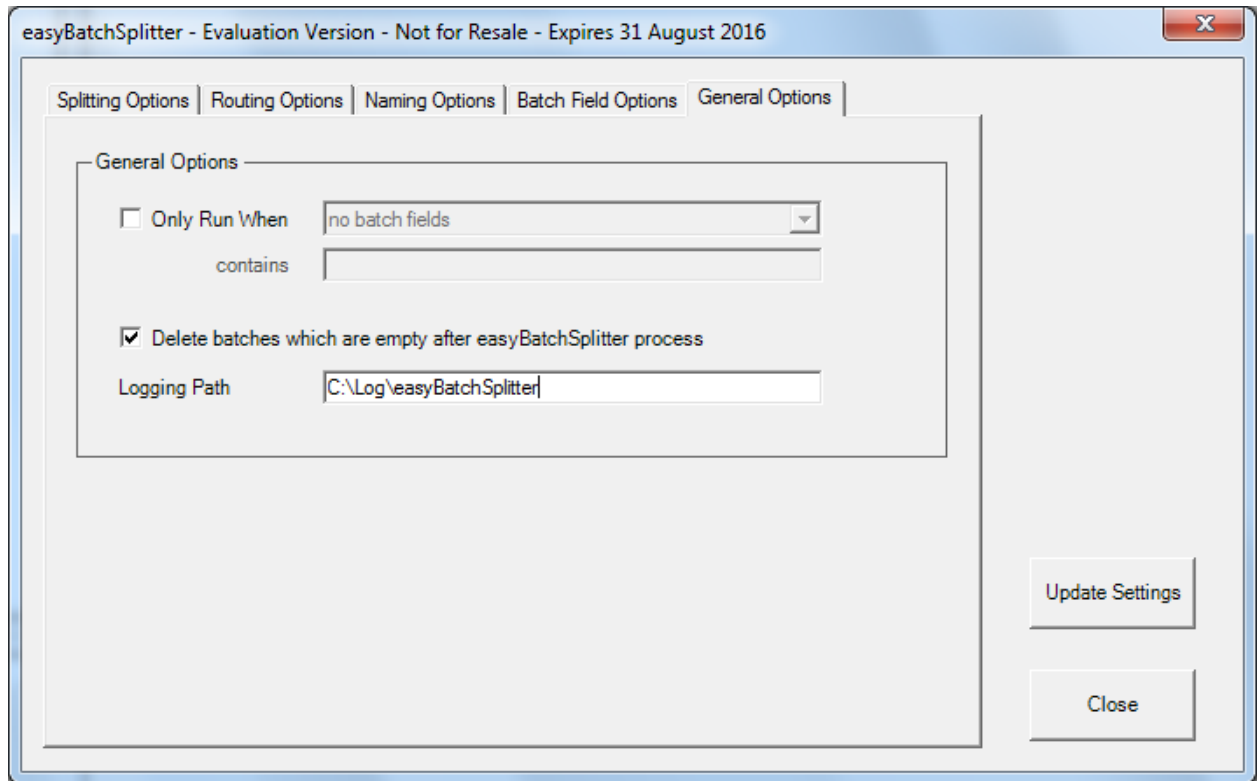
When new batches are created, if they have a batch field of the same name, then the value from the original batch will be copied across.

#### 3.5.2 Copy Specific Parent Batch Values

It is also possible to copy some specific values from the original batch to newly created batches.

Select any/all of **Batch ID**, **Batch Class** and **Batch Name** and select the target batch fields in new batches to copy the values to.

### 3.6 General Options



Select **Only Run When** to make **easyBatchSplitter** processing optional for batches. Processing will only run when the selected batch field contains the specified value.

Select **Delete Batches which are empty after easyBatchSplitter process** to remove the original batch if all pages and/or documents have been moved to new batches.

Enter a path for easyBatchSplitter logs. Leave empty if you do not require logging. In the selected directory there will be a LOG\_MMyy.txt and an ERR\_MMyy.txt for each month.

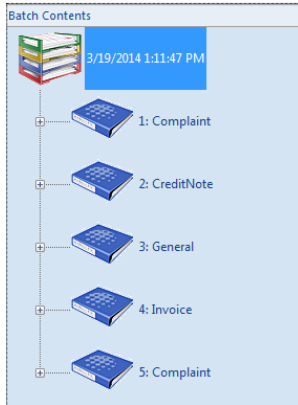
### 3.7 Update Settings

Click **Update Settings** to save the currently defined settings for the current batch class. The batch class will need to be re-published to make these settings live.

## 4 Production Processing

A typical **easyBatchSplitter** process is shown below:

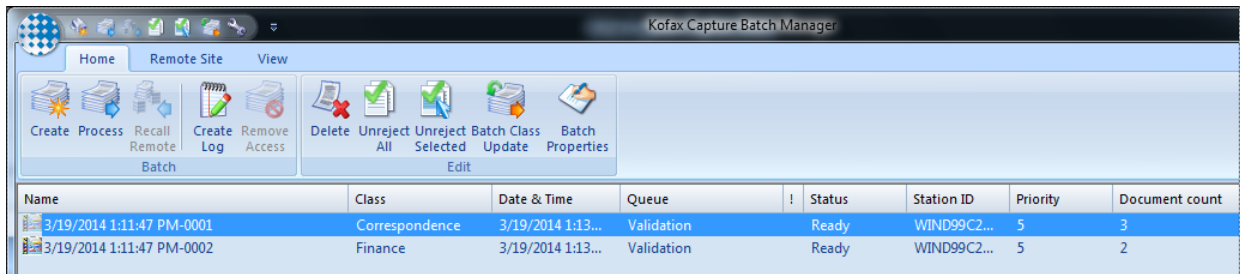
Original batch is scanned and contains multiple document classes.



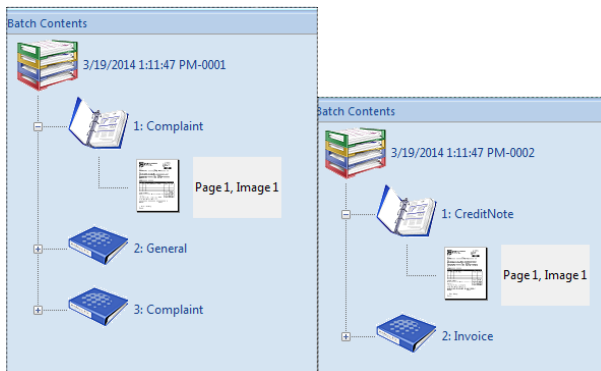
After **easyBatchSplitter** processing, two new batches have been created – 1 of Batch Class Correspondence, and 1 of Batch Class Finance.

The batches have been named as [Parent Batch Name]-[Counter]

The original batch has been deleted as all documents have been split out to new batches.



New batches have only the relevant documents.



## 5 General Considerations

### 5.1 Running easyBatchSplitter

**easyBatchSplitter** can change the workflow and batch class of scanned documents and pages. As a result it is possible that other workflow agents, scripts and modules may not run. It is recommended that **easyBatchSplitter** is fully tested in a development/test environment to ensure that batch processing is correct for all configured batch classes before using in a production system.

**Always take a FULL backup of all Kofax Capture batch class configuration before installing any new custom components.**

### 5.2 easyBatchSplitter and KTM

**easyBatchSplitter** can be used with KTM batches, however all processing must happen before any KTM modules process the batch.

If batches are re-processed through easyBatchSplitter after being processed by KTM, you may lose some or all of the extracted data and classification. You should select not to reprocess batches – see section 3.3.3

See [here](#) for a batch splitting toolkit available for KTM.

## 6 Contact

For support and assistance please contact [mail@davidcrewe.com](mailto:mail@davidcrewe.com)