www.bluelake.com

Bluelake Document Edit Utility for Kofax

Overview

The Bluelake Document Indexing Utility for Kofax enables editing of document index values (meta data) from within the Ascent Capture Scan or Quality Control Modules. It is particularly useful in Kofax Capture workflows that feature automated validation, where exceptions are routed to Quality Control. Editing of meta data values can be completed within Quality Control without having to reroute documents through the Validation queue.

Features

- Accessible via right click option in Scan and Quality Control Modules Kofax menus
- Update Batch or Document level fields including hidden fields and table fields

System Requirements/Compatibility:

- Kofax Version 5.51 through 10.x

Download and Installation:

A demo download of the application is available at our website at http://www.bluelake.com/Products under the Kofax-Related Apps and Utilities section.

After download, double-click on the exe file to invoke the install. The demo download provides a 15 day fully functional version of the product, which can be converted to a permanent copy by purchasing a license.

Pricing:

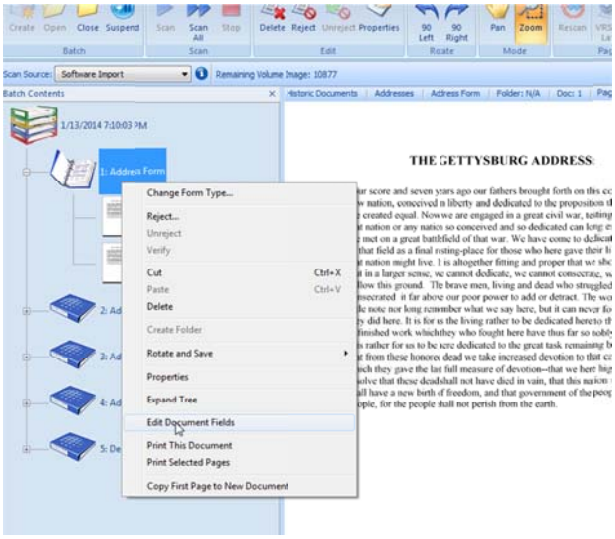
Qty 1	Qty 3	Qty 5	Qty 10	> 10
$250	$600	$750	$1000	$100 each

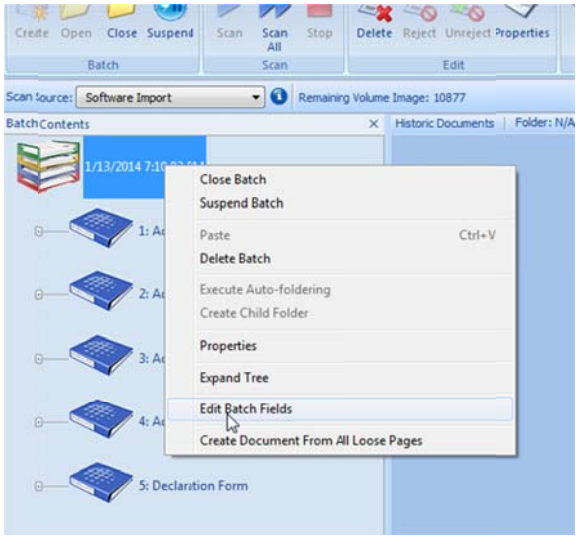
For more information or to purchase licenses, please contact:

Bluelake Software, Inc.
www.bluelake.com
Phone: (888) 374-2220 x201 Email: info@bluelake.com

Bluelake Document Edit for Kofax - User Instructions

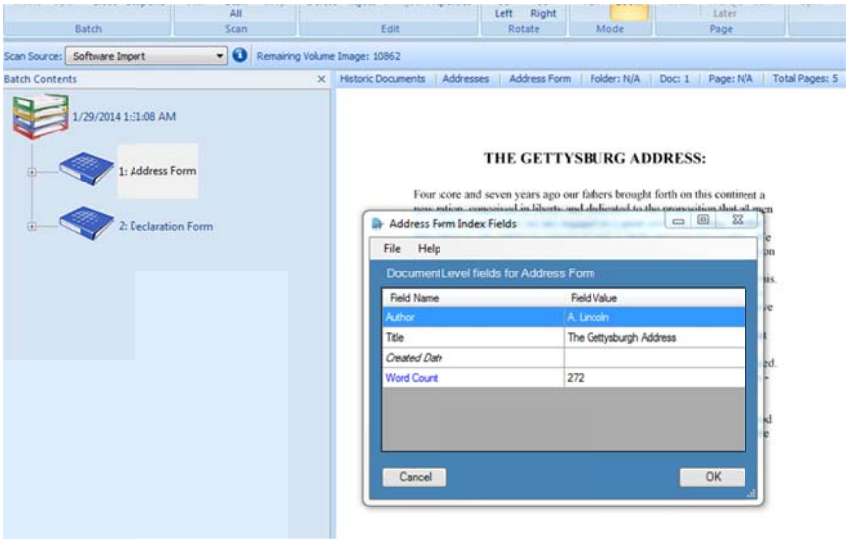
After installation, when opening the Kofax Scan or Quality Control Modules, a new option will be visible when right clicking at the batch or document level within the batch contents pane, as shown below.





Editing Document Fields

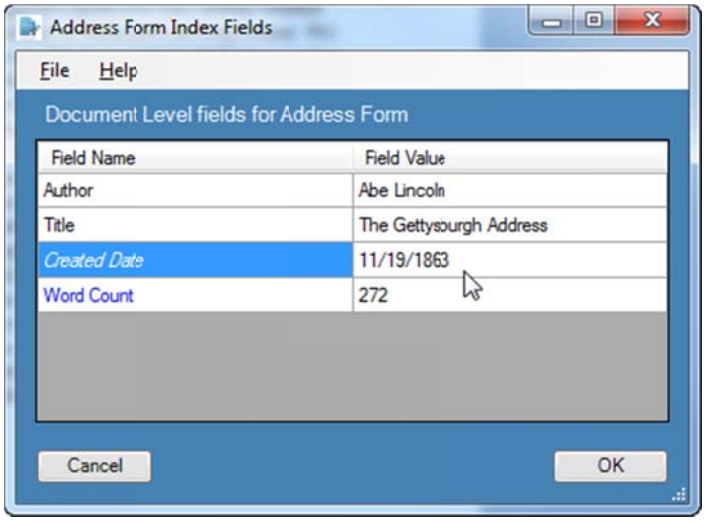
Right click on a defined document and select Edit Document Fields as shown above, left. The application window will appear as shown below.



Kofax meta data fields are formatted according to their type:

Hidden Fields - *Italicized* text
Table Fields - Blue text
Required Fields - **Bold** text
Standard fields - Standard text

To change the value contained in a field, click the cursor into the field value column and make the change:

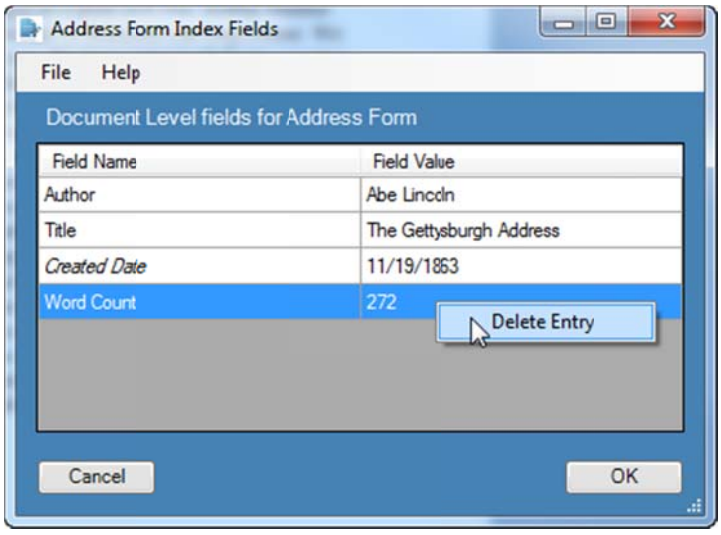


Additional Notes on Table Fields

It is only possible to modify existing table field instances within *Document Edit for Kofax*, not add additional instances. To add additional table field instances, the batch class must be rerouted to the Validation module, where the standard Cntl + I command can be used to add additional instances of a table field.

Delete an instance of a table field:

It is possible to delete instances of table fields from within *Document Edit for Kofax* – except for the initial instance -- by right-clicking on the table field, as shown below:

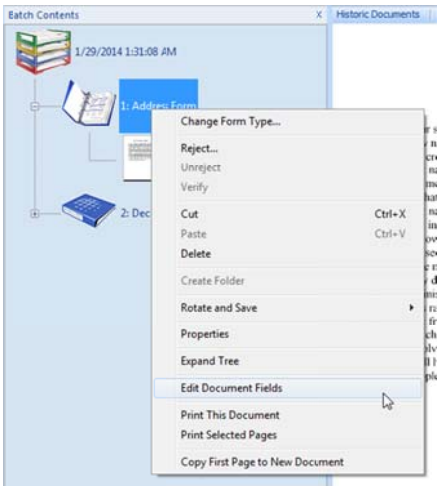


Product Licensing Instructions

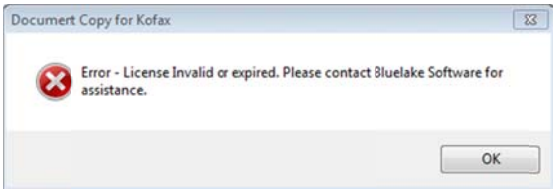
When first installed, a temporary 14 day, 100 use license will be created for Document Copy. The license can be extended or converted to a permanent license with a license key. To extend the temporary license or to purchase a permanent license code, please contact Bluelake Software.

Activating a license key:

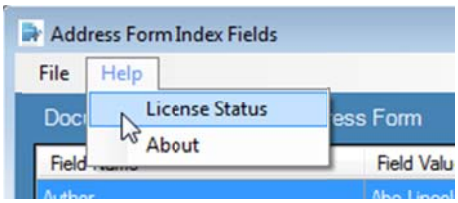
To activate a license key, open a Batch in Batch Manager in one of the applicable Kofax modules – Scan, Quality Control, etc., and click to invoke one of the options:



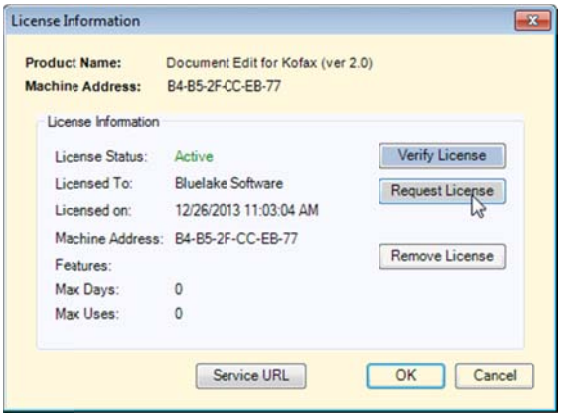
You might see the following message if the license has expired. Click OK to continue.



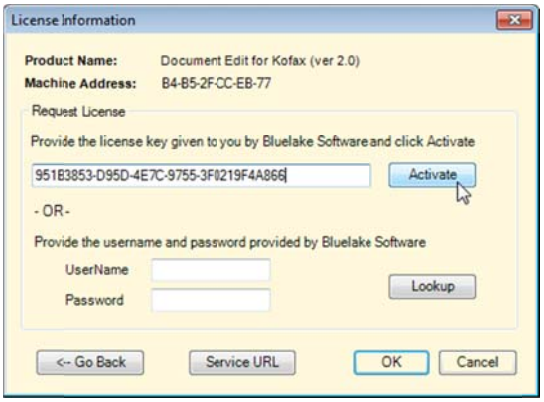
Otherwise, from the resulting application window select *Help, License Status*.



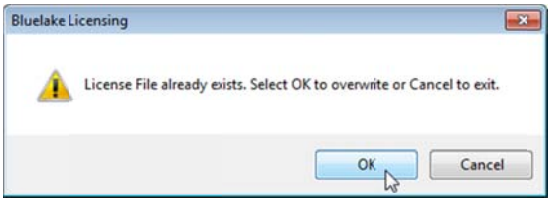
On the License Information window click the **Request License** button



On the resulting License Activation window copy and paste the license key into the Activation box and click the Activate button:

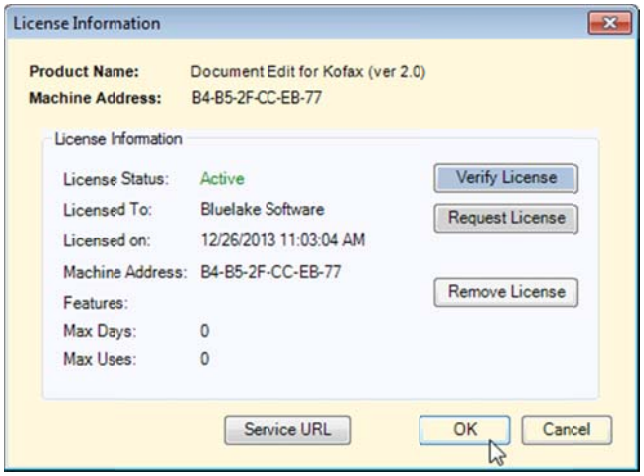


Select OK to overwrite the existing (expired or temp) license:



The License Creation Successful message sh0uld be displayed – click OK to close:

Click OK to close the license window:


License Information
Product Name: Document Edit for Kofax (ver 2.0)
Machine Address: B4-B5-2F-CC-EB-77
License Information
License Status: Active
Licensed To: Bluelake Software
Licensed on: 12/26/2013 11:03:04 AM
Machine Address: B4-B5-2F-CC-EB-77
Features:
Max Days: 0
Max Uses: 0
Verify License
Request License
Remove License
Service URL
OK
Cancel