

One Touch Processing

Installation and Configuration Guide

Written by: Product Knowledge, R&D
Date: November 2017



© 2017 Kofax. All rights reserved.

Kofax is a trademark of Kofax, Inc., registered in the U.S. and/or other countries. All other trademarks are the property of their respective owners. No part of this publication may be reproduced, stored, or transmitted in any form without the prior written permission of Kofax.

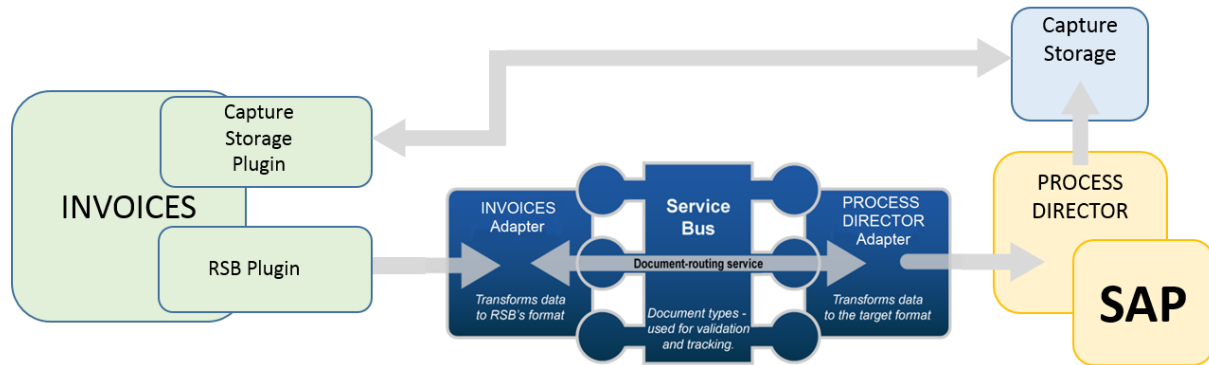
Table of Contents

- Introduction 4**
 - What is One Touch Processing? 4
 - Component overview 5
- System requirements..... 5**
 - Dependencies..... 5
 - Capture Storage INVOICES plugin*..... 5
 - Capture Storage*..... 5
- Procedure..... 6**
 - Install INVOICES Capture Storage plug-in..... 6
 - Configure INVOICES 6
 - Skip INVOICES verification 7
 - Configure ReadSoft Service Bus..... 7
 - Configure PROCESS DIRECTOR 8
 - Set the Web Service URL* 8
 - Configure OCR messages* 9
 - Verification of received data* 9

The "rubberbanding" functionality is a feature of the Capture Storage service, so when the user rubber bands image data in Accounts Payable, PROCESS DIRECTOR calls the Capture Storage service.

When the user posts the document in PROCESS DIRECTOR, the updated document values and positions are sent to the Capture Storage Autolearning Worker service. This service then passes the new values and positions to the INVOICES database.

Component overview



System requirements

- INVOICES 5-8 SP2
- INVOICES Invoice Rules plug-in
- INVOICES Capture Storage plug-in (CaptureStorage_setup.exe build #1.0.0.483 or newer)
- Capture Storage service (ReadSoft CaptureStorage.msi build #1.0.0.15 or newer)
- ReadSoft Service Bus version 2-4 HF22 or later
- ReadSoft Service Bus INVOICES plug-in
- ReadSoft Service Bus INVOICE COCKPIT RFC Adapter
- ReadSoft Service Bus INVOICES Adapter

Dependencies

Capture Storage INVOICES plugin

- Ice.Persistence.1.0.15126.59
- ReadSoft.CaptureStorage.Clients.0.2.609.0 (1.0.0.15)
- ReadSoft.CaptureStorage.Models.dll (1.0.0.0)
- ReadSoft.Common11.dll (1.1.11053.0)
- Interop.EHICOM.dll (1.1.0.0)

Capture Storage

- Ice.Rubberbanding.1.0.15091.3

Procedure

To install and configure OTP, complete the following procedures, in the order presented.

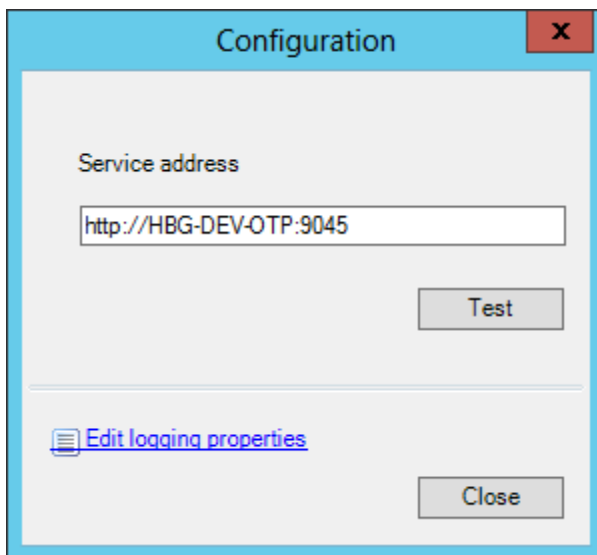
Install INVOICES Capture Storage plug-in

To install the INVOICES Capture Storage plug-in, complete the following steps.

1. Double-click the `CaptureStorage_setup.exe` file and follow the instructions in the wizard.
2. Double-click the `ReadSoft CaptureStorage.msi` file and follow the instructions in the wizard.
3. In the Capture Storage folder (the path to this is specified in the installation wizard), configure these files:
 1. In the `ReadSoft.CaptureStorage.SelfHost.Service.exe.config` file, specify the host and port, file storage and shared storage folder, and the log file path.
 2. In the `ReadSoft.CaptureStorage.AutolearningWorker.SelfHost.Service.exe.config` file, specify the shared storage folder, the Invoice Capture Engine folder, the `EIGlobalPath`, and the `DueTime`.

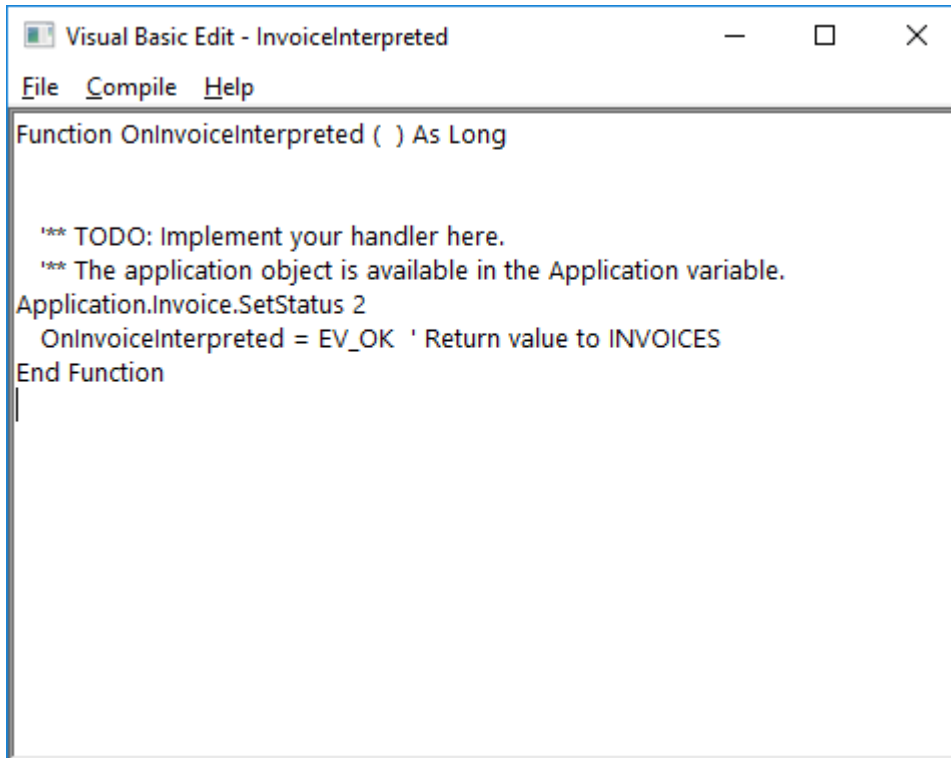
Configure INVOICES

1. In INVOICES Manager, set up a profile or use an existing profile. Make sure that in the job description, in the **Transfer** settings, the **XML output** check box is selected, and then set the output directory for the XML file.
2. In INVOICES Manager, on the **Plug-ins** menu, click **Capture Storage**. In the Configuration menu, type the address of the Capture Storage service. The port number must be the same as the port number configured in the Capture Storage service configuration file.



Skip INVOICES verification

To enable gains with OTP and to allow it to work as intended, the verification process needs to be replaced and should no longer be carried out in INVOICES. This skipping of the verification step can be achieved by using VBA code (Application events) as mentioned herein, or by using the INVOICES plugin, *InvoiceRules*.



```

Visual Basic Edit - InvoiceInterpreted
File  Compile  Help
Function OnInvoiceInterpreted ( ) As Long

    *** TODO: Implement your handler here.
    *** The application object is available in the Application variable.
Application.Invoice.SetStatus 2
    OnInvoiceInterpreted = EV_OK ' Return value to INVOICES
End Function
    
```

Configure ReadSoft Service Bus

In the ReadSoft Service Bus Administration, set up a document service to send invoices from INVOICES to PROCESS DIRECTOR Accounts Payable by using the **Import invoices from INVOICES** and **Export to PROCESS DIRECTOR Accounts Payable** activities. See the *ReadSoft Service Bus online help* for more information.

Configure PROCESS DIRECTOR

To configure PROCESS DIRECTOR for OTP, complete the following steps.

1. Go to `/COCKPIT/C70`.
2. In change mode, add a new entry.
3. Select the **Activate** check box.
4. In the **URL for Verification Service** section, enter the URL of the Capture Storage service.
5. In the **URL for Auto Learning section**, enter the URL of the Capture Storage Auto Learning Worker service. In the **Auto Learning Host** field, enter the domain name, and in the **Auto Learning Service** field, enter the port number.
6. Save your changes.
7. Optionally, you can configure OTP messages in `/COCKPIT/C72`, and activate verification checks in `/COCKPIT/C71`.

Set the Web Service URL

Transaction: `/COCKPIT/C70`

Setting	Description
Activate Verify from SAP	Select to activate OTP. The SAP System ID field is currently not used.
URL for Verification Service	Enter the URL of the Capture Storage service. You can append these parameters to the URL: <ul style="list-style-type: none"> • app/: • #/: • documents/: • {DOCID}: • ?log: Add this parameter to display a log below the image in PROCESS DIRECTOR for debugging purposes.
URL for Deletion Service	Currently not in use.
URL for Auto Learning	Enter the URL of the Capture Storage Auto Learning service, as well as the Host (domain name) and the Service (port number).

Configure OCR messages

Transaction: /COCKPIT/C72

You can configure which OTP messages are written to the PROCESS DIRECTOR message log, and specify which messages should be displayed to the user.

Setting	Description
OTP: Message configuration	Specify which messages should be attached to the log: Errors, warnings, and original messages.
OTP: Display configuration	Specify which messages should be displayed to the user: Errors, warnings and success messages.

Verification of received data

Transaction: /COCKPIT/C71

You can configure function modules to run verification checks on the fields passed to PROCESS DIRECTOR from INVOICES. PROCESS DIRECTOR provides these function modules in the standard, but you can also write and add your own.

- /COCKPIT/OTP_PO_NUMBER_CHECK
 - Checks if the PO number captured from the invoice exists in the SAP system
- /COCKPIT/OTP_DELIV_NOTE_CHECK
 - Checks if the delivery note number captured from the invoice exists in the SAP system

Date and amount fields are automatically checked to ensure that the captured value is a date or an amount.

Setting	Description
Field Name	Field to be verified.
Function Module	Function module that performs the verification.