



CaptureBites + Box + Kofax

Scan to Box including Box metadata attributes with the CaptureBites Box Export Connector for Kofax

Box has a strong focus on business users and lets you share files with colleagues, assign tasks, leave comments on someone's work, and get notifications when a file changes. You can even create text documents in the integrated Box text editor.

These features make Box a good solution for document management, including management of scanned business documents in PDF format.

Use Box and Kofax to convert your paper documents to searchable content

With the CaptureBites Export to Box for Kofax, you can make use of Kofax Express or Kofax Capture index fields to automatically name folders, subfolders and files in Box.

You can map Kofax index fields with Box metadata attributes for precise searching. And you can generate searchable PDFs (or PDF/A) to perform a search on any word in your scanned documents stored in Box.

Once your documents reside in Box, they also become mobile. Box apps are available for Android, iOS and Windows smart phones and tablets.

And if you want to store documents on your local system or server, install the Box sync software to keep a local replica of your documents as well.

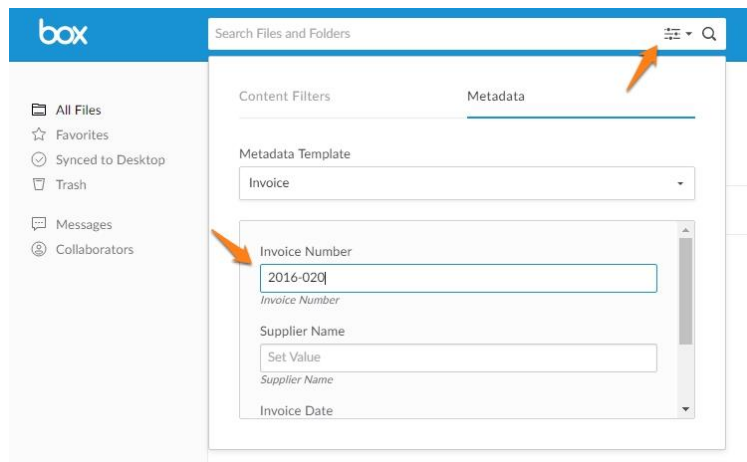
What are Box metadata attributes and why use them?

Metadata attributes are very common in traditional document management systems. They are also called properties (Alfresco), columns (SharePoint) or Kofax tends to refer to them as index fields. Box is the only cloud storage service that features metadata attributes.

To explain metadata and why it is important in a business environment, let's first have a look at a simple use case where a classic "Google search" type doesn't really work well. Assume I want to look for a purchase invoice with invoice number 2016-020. If I do a full text search for 2016-020 across all my documents, I'll find many candidates. The result list would be very long and include irrelevant documents containing dates of the year 2016, telephone numbers containing those numbers and hopefully somewhere in the list the invoice with invoice number 2016-020.

Using metadata attributes is the way to solve this problem. In Box terminology, you just would create a metadata template for invoices. And create a metadata attribute for invoice number. You could also add metadata attributes such as supplier name and invoice date if you want to be able to search / filter your invoices on those criteria. If you are familiar with a database, attributes are like fields in a database table or columns in an Excel sheet.

Once you have defined your Box metadata attributes, you can use Kofax Express with CaptureBites MetaTool to scan your invoices, automatically extract the invoice number, invoice date etc. and store the invoices with these metadata attributes in Box.





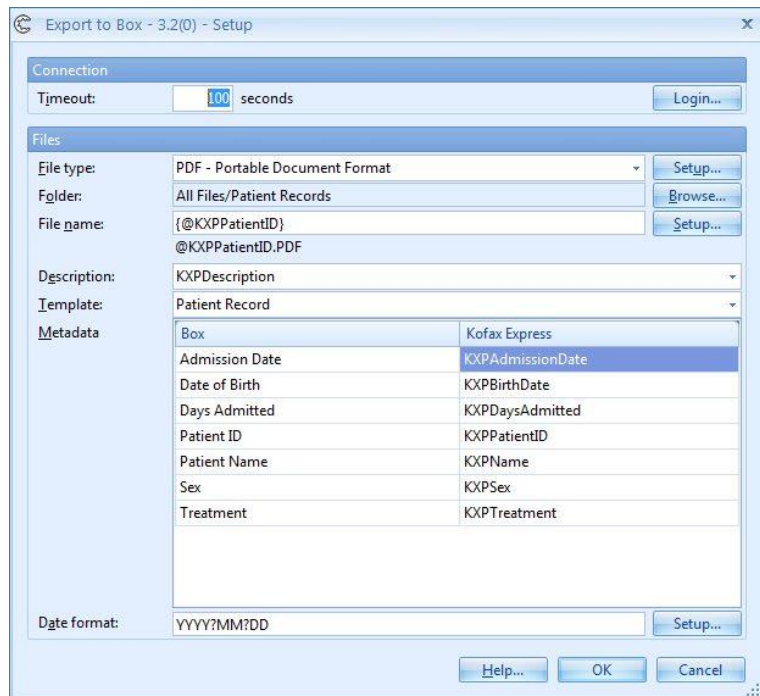
If you want to search for the document with invoice number 2016-020 in Box, you just press the advanced search button and enter 2016-020 in the Invoice Number search field. The search will result in the invoice you are looking for.

CaptureBites Box Connector Setup

After installing the Box connector, open the Job tab in Kofax Express and select the Box connector in the Connector list and press the Setup button next to it. For Kofax Capture users, add the Export connector to your document class and press Setup.

The settings are self-explanatory:

- Press Login, to change your Box account. Next time, the connector will automatically login to your last used account.
- You first define the image file type, PDF, PDF/A or TIFF and with the Setup button next to it, you can configure additional options for the selected file format. For example enable OCR to generate searchable PDFs to search on any word in the scanned documents in Box.
- Next, you compose the folder and file name structure by picking elements, such as index fields, document number or export date from the Setup menu.
- Box features a free text description for each document. You can map any of the Kofax Express index fields with the Box description or leave it empty.
- Finally, if you have defined a Metadata template, select it and map Kofax Express index fields with each of the Box Metadata attributes to automatically fill them during export.
- If one or more of your mapped Box metadata attributes are date type attributes, configure the input data format (the data format used in the Kofax Express index fields) to correctly update your Box date attributes.



Demo job included with the Box connector for Kofax Express

Find the CaptureBites Box Export Connector for Kofax Express download here: www.capturebites.com/box

The Box connector for Kofax Express comes with a pre-defined scan Job called "CB Box". It includes a batch with some patient record images.

A trial version of Kofax Express can be downloaded here: www.kofax.com/contact/kofax-express-trial

Find the Box metadata tutorial here:
[Box Metadata Tutorial](#)

Find more information about Box metadata for admins here:
[Box Metadata for Admins](#)