

Kofax Capture

Kofax Capture Export Connector - Documentum Administrator's Guide



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Preface

This document contains information for the using Kofax Capture with Documentum. This export connector exports document images, OCR full text files, PDF documents, eDocuments, and data to the Documentum repository.

Please read these notes carefully as they contain information not included in the Help or printed documentation.

Related Documentation

This document is a supplement to the following:

- Documentation supplied with Kofax Capture
- Online Help supplied with your Documentum Export Connector.

Tip For additional information about Kofax products, visit our Web site at www.kofax.com and go to the Technical Support pages. The Technical Support Web pages provide product-specific information, such as current revision levels, the latest drivers and software patches, technical tips, and a searchable knowledgebase. In addition, updates to product documentation (if any) are available from these pages.

System Requirements

This export connector requires the following components to be installed prior to installing this export connector.

Documentum Server Support

The following versions of Documentum Server are supported

- Documentum 6.0 Content Server
- Documentum 6.5 Content Server
- Documentum 6.6 Content Server

Kofax Capture Support

This export connector is certified with:

- Ascent Capture 7.5
- Kofax Capture 8
- Kofax Capture 9

Client Operating System Support

This export connector supports the following client operating systems:

- Windows 2000 Professional with Service Pack 4
- Windows 2000 Server with Service Pack 4
- Windows Server 2003 (Standard or Enterprise Edition)
- Windows XP Professional with Service Pack 2

Note At the time of publishing, this export connector was certified with the Service Packs listed above.

Administration and Export Workstations – Additional Requirements

The Administration and Export workstations must have the following components installed:

- Ascent Capture 7.5, Kofax Capture 8, or Kofax Capture 9
- DFC 6.0 (API), DFC 6.5 (API), DFC 6.6 (API)

Note All subsequent uses of “Kofax Capture” in this document refer to any supported version of Kofax Capture and Ascent Capture.

Overview

This export connector copies document images and data from Kofax Capture into the Documentum repository.

This guide contains information not included in the Kofax Capture documentation.

Features

This section contains information about the major features of this export connector.

Kofax Capture Values / Documentum Properties

This export connector provides an easy-to-use interface for linking Kofax Capture Values to Documentum document properties and folder properties. Examples of Kofax Capture Values include Document index fields, Folder index fields, Batch fields, and Text Constants.

Kofax Capture Value {Document GUID}

The Kofax Capture Value {Document GUID} is a new value that can be used for index fields and export values. This Kofax Capture value is a type of document ID that is unique across the central site and all remote sites that comprise a Kofax Capture installation. The Document GUID is the concatenation of the Batch GUID and the document ID number. For example, a Batch GUID of {D3C58EE2-5627-443b-BBFA-EE7A5790482A} and a document ID of 123 will yield {D3C58EE2-5627-443b-BBFA-EE7A5790482A} 123 as the Document GUID.

Sharing Data Among Export Connectors

The Kofax Capture Export Connector Information Interchange feature is useful when more than one export connector has been configured for a particular batch class and document class combination.

The sharing of information is accomplished by allowing the export connectors to pass information to other export connectors. The Kofax Capture Value {Repository Document ID} is used to store and retrieve the RepositoryDocumentID that will be used by the first invoked export connector.

Therefore, the first export connector that runs can set this value, and subsequent export connectors can read the same value.

Notice that when you are passing the RepositoryDocumentID information to a different export connector, the export connector must exist within the same document class using multiple export. In addition, the export connector that is passing the RepositoryDocumentID information must be placed first in the list on the Export Connectors window. For example:

```
Documentum 6.0-6.6
Kofax Capture Text
```

Only the first export connector can set the RepositoryDocumentID value. Subsequent export connectors can only read this value.

Integrated Export Connector

This export connector provides an easy-to-use setup window available from the Kofax Capture Administration module. This window allows you to specify export settings at batch class setup time that control how documents are exported into your Documentum repository.

Image Support

This export connector supports releasing the following file formats/compression formats:

- Multipage TIFF with Group 3, Group 3/2D, and Group 4 Compression
- Multipage TIFF – Uncompressed Image Format
- Multipage TIFF with JPEG Compression
- Single page TIFF with Group 3, Group 3/2D, and Group 4 Compression
- Single page TIFF – Uncompressed Image Format
- Single page TIFF – JPEG Compression
- PCX – PackBytes
- JPG – JPEG Compression
- Kofax PDF
- Adobe PDF from TIFF
- Adobe PDF from JPEG
- Adobe PDF from PCX

Kofax PDF Support

You can export Kofax PDF documents into your Documentum repository. Kofax PDF is bundled with Kofax Capture and does not require additional software implementation. Kofax PDF documents can be saved in the following output types:

- Image Only
- Image + Text files

Adobe Acrobat Capture PDF Support

this export connector supports releasing Adobe Acrobat Capture PDF documents into your Documentum repository. The software is provided by Adobe Acrobat Capture and is not included with the Kofax Capture product. To export Adobe Acrobat Capture PDF documents, you must install the Adobe® Acrobat Capture® 3.04 Clustered or Personal Edition software.

OCR Full Text Support

You can export documents processed through the Kofax Capture OCR Full Text module into your Documentum repository.

eDocument Support

You do not need to limit your batches to image files. eDocuments are supported for export into Documentum as renditions.

Help Provided for Export Setup

Online Help is installed with your export connector. It is available from the Administration module. You can click the Help button from the export connector setup window to display Help information about export options.

Additional Information

This section contains additional information about this export connector.

Unsupported Kofax Capture Features

The following Kofax Capture features are not supported.

SecurityBoost

The SecurityBoost feature allows you to enhance Kofax Capture security for systems using Microsoft Windows XP or Windows 2000. If security is an issue, run the export connector on a protected computer.

If the SecurityBoost feature is enabled for Kofax Capture on your Microsoft Windows XP or Windows 2000 workstation, you will need to bypass it. Use the following procedure to bypass the SecurityBoost feature.

► To bypass the SecurityBoost feature

- 1 From the Windows taskbar, select Start | Run.
- 2 In the text box, enter `export.exe /NoBoost` (For example, “C:\Program Files\Ascent\Bin\export.exe”/NoBoost).
- 3 Click OK.

File Name Retention

File name retention is not supported. This means that the original imported file name will not be retained and the default numeric name will be used for the exported files.

Tip The Kofax Capture Value “{First Page Original File Name}” allows you to retain the original file name for the first page of a document. This value can be linked to Documentum properties that support Kofax CaptureValues. Notice that the Documentum property type must be able to accept all the characters that are part of the original file name and must not exceed the defined length or export may fail.

{Index Operator's Station ID} Kofax Capture Value

The Kofax Capture Value {Index Operator's Station ID} has been deprecated, and replaced by {Validation Operator's Station ID}. It is strongly recommended that you use {Validation Operator's Station ID} instead.

Releasing eDocuments Only (Without Image Files)

All eDocuments are exported into Documentum as rendition documents. This means that when you export an eDocument without image files, Documentum will show the document as "binary data" and the eDocument will only be viewable as an attachment (or rendition in Documentum). Notice that eDocuments cannot be exported as the primary document (eDocuments only).

OCR Full Text Options

To export OCR full text files, you must enable Kofax Capture OCR full text processing in your applicable document class and add the OCR Full Text module to your applicable batch class.

Kofax PDF Options

To export Kofax PDF documents, you must enable Kofax PDF generation in your applicable document class and add the Kofax PDF Generator module to your applicable batch class.

Adobe Acrobat Capture Options

This section contains information related to using Adobe Acrobat Capture for your Adobe PDF documents.

Operating System Requirements for Kofax Capture

To export Adobe PDF documents, your Kofax Capture Administration and Export workstations must be running on Windows XP or Windows 2000. Windows 95, Windows 98, Windows Me, and Windows NT are not supported operating systems for Kofax Capture.

Adobe Acrobat Capture and the Kofax Capture Export Workstation Installations

During the conversion process, communication needs to occur between Adobe Acrobat Capture and the Kofax Capture Export module. However, due to timing conflicts, Adobe Acrobat Capture and Kofax Capture cannot be run at the same time on a workstation. Therefore, Adobe Acrobat Capture and Kofax Capture must be installed on separate workstations on the same LAN.

Workflow Steps

Adobe Acrobat Capture lets you create your own workflow or use one of the predefined workflows. Note the following:

For complete image conversion for Formatted Text & Graphics or Searchable Image page content, a basic Adobe Acrobat Capture workflow must contain at least four steps, in this order:

- 1** Capture Image
- 2** Bind Pages
- 3** Export to PDF

4 Store File (PDF)

For complete image conversion for Image Only page content, the Adobe Acrobat Capture workflow must be called “PDF Image Only” and contain at least three steps, in this order:

- 1 Convert Image to PDF
- 2 Combine PDFs
- 3 Store File (PDF)

Note When creating workflows, do not include manual steps such as Quick Fix Page, Review Document, and Zone Images. If you do, Adobe Acrobat Capture will stop running when it encounters any of these steps and require manual processing by the user. This kind of workflow is not suitable for Kofax Capture Export because it disrupts the automated process of releasing Adobe PDF documents.

Multipage TIFFs

If you are releasing multipage TIFFs, you must use the Split Multipage TIF step in your Adobe Acrobat Capture workflow.

Releasing From Multiple Kofax Capture Standalone Workstations

If you use multiple Kofax Capture standalone workstations and one Adobe Acrobat Capture hub, you must create unique Adobe Acrobat Capture “workflows” and “watched folders” for each Kofax Capture standalone workstation. This is because Adobe Acrobat Capture uses Kofax Capture document IDs for its document-naming scheme. Since standalone Kofax Capture document IDs may not be unique, the document names could conflict in Adobe Acrobat Capture and cause the export process to fail.

Re-releasing Documents in Error

If an Adobe Acrobat Capture error occurs during the export process, you must clear your Adobe Acrobat Capture finished documents and cancel any hung documents before re-releasing the same documents in Kofax Capture.

Invalid Watched Folders

If you attempt to export documents to an invalid Adobe Acrobat Capture watched folder, the documents will be rejected. To cancel the export, click Cancel on the Kofax Capture PDF Export window displayed at the Export workstation. The Cancel button will automatically cancel the Adobe Acrobat Capture documents.

Installing the Export Connector

You can install the export connector on a Kofax Capture client workstation or standalone workstation.

Important Notes About Installing the Export Connector

You must have Windows administrator privileges. If you do not have administrator privileges and install this export connector, you may receive error messages and several of the files may not install correctly.

Separate Computers

You must install the Kofax Capture software and the Documentum server components on *separate* computers. If you install Documentum and Kofax Capture on the same computer, communication between any Documentum components and the DocBroker will fail. This is an unsupported configuration. (SPR 00009740)

Installation Instructions

Use the following instructions to install the Ascent® 7.5 Release Script for Documentum 6.0-6.5.

► To install the export connector

- 1 Insert your installation CD into your CD drive.
- 2 From your Windows task bar, select Start | Run, browse to the Documentum\Documentum6 folder on the CD, and run Setup.exe. The installation program will start.
- 3 Follow the instructions on your screen to install the export connector.
- 4 When the installation is complete, a message will display that indicates the export connector was successfully installed.

Note Installing the export connector automatically registers it with Kofax Capture.

- 5 Repeat this procedure on all Administration and Export workstations that will use the export connector.

Note Upgrading from a previous export connector is not supported.

Application Maintenance

This section describes how to repair and remove the export connector.

Repairing the Export Connector

The Repair option replaces missing, renamed, or deleted files.

► To repair the export connector

- 1 Insert the installation CD into your CD drive.
- 2 From your Windows task bar, select Start | Run, browse to the Documentum\Documentum6 folder on the CD, and run Setup.exe.
- 3 Setup will detect an existing installation and the Application Maintenance window will display.

- 4 From the Application Maintenance window, ensure that the “Repair” option is selected and then click Next.
- 5 Follow the instructions on the screen to repair the export connector.
- 6 When the repair is complete, a message will display that indicates the export connector was successfully installed.

Removing the Export Connector

The Remove option will delete the export connector.

► To remove the export connector

- 1 Insert the installation CD into your CD drive.
- 2 From your Windows task bar, select Start | Run, browse to the Documentum\Documentum6 folder on the CD, and run Setup.exe.
- 3 Setup will detect an existing installation and the Application Maintenance window will display.
- 4 From the Application Maintenance window, select “Remove” and then click Next.
- 5 Follow the instructions on the screen to delete the export connector.
- 6 When the uninstallation is complete, a message will display that indicates the export connector was successfully uninstalled.

Alternatively, you can use the Add or Remove Programs utility from the Windows Control Panel.

Note After uninstalling, the export connector will continue to appear in the Kofax Capture Export Connector Manager, although it will not be functional. To remove the export connector from the list, you must go into every batch class and associated document class, select the applicable export connector from the Assigned Export Connectors list, and click Remove. You must do this for every instance of the Documentum export connector. After all references are removed, you will be able to delete the export connector from the Export Connector Manager.

Logging On to the Export Connector

Once you have associated a document class with a batch class in Kofax Capture, you may specify the export connector to use when releasing your images, OCR full text files, PDF documents, eDocuments, and index data.

► To log on to the export connector

- 1 Start the Kofax Capture Administration module. The module’s main screen will display.
- 2 Select the Batch class tab on the Definitions panel, and right-click the applicable document class. (Expand the batch class item to select associated document classes.) A context menu will display.
- 3 From the context menu, select “Export Connectors.” The Export Connectors window will display.
- 4 The Export Connectors window lists all available export connectors. Available export connectors are those that are registered with Kofax Capture. From the Export Connectors window, select the export connector, and click Add. The login window will display.

- 5 Enter your Documentum user name, password, and the desired Documentum repository. (The user name and password are case-sensitive.)

Note The login information will be saved and used during Export.

- 6 Click OK.

Setting Up the Export Connector

The following sections describe the setup options.

Storage Settings Tab

This tab allows you to specify the storage location for your exported documents. In addition, you can select from a list of available Documentum folder object types and link Kofax Capture Values to Documentum folder properties. This tab allows you to create folders for your exported documents.

Document Settings Tab

This tab allows you to select from a list of available object types, and link Kofax Capture Values to Documentum properties. It also allows you to specify document versioning and optionally select a dynamic object type to your exported documents.

Document Options Tab

This tab allows you to select from a list of available permission sets, and link Kofax Capture Values to Documentum permission sets. It also allows you to set full text indexing, specify whether exported documents are to be converted to virtual documents, and select a location for saving exception documents.

Routing Tab

This tab allows you to specify the lifecycle stages for exported documents and define distribution options. In addition, you can specify an existing or dynamic workflow for exported documents.

Image Format Tab

This tab allows you to specify the desired image format(s) for releasing your images. You can specify a primary format and a rendition format. If Adobe PDF is selected as an image format, the PDF Settings on this tab will become available for selection.

General Settings Tab

This tab allows you to specify a temporary storage location to be used at export time, and specify whether to skip the first page of each document. You may want to skip the first page if you are using standalone separator sheets to separate your documents, and you do not want to export the separator sheets.

Publishing a Batch Class

After you select all your batch class settings, you must publish your batch class before you can use it.

If you ever decide to edit your batch class, you must publish your batch class again before your changes can be used. Your changes will not be applied to batches created before the new publication date.

Exporting Batches

The Kofax Capture Export module will process batches based on the settings of the associated batch classes. The Export module is responsible for exporting documents, as well as index data using the attributes defined during export setup.

The Kofax Capture Export module usually runs as an unattended module on a Windows workstation, periodically polling the Export module for available batches. The Export module may be configured to run during off-hours to avoid any impact to the throughput of Kofax Capture and/or the network system.

The following sections describe how eDocuments are exported to the Documentum repository, depending on whether documents are to be stored in a specified cabinet, folder or a virtual document.

Storing to a Specified Cabinet / Folder

If a document to be exported contains eDocuments and the “Store to Virtual Document” option is *not* selected on the Storage Settings tab, the following will occur:

- 1 Each image will be exported to a document object. The images will be stored in Documentum using the same image content type (file format). The document object will be given the name of the document (object_name) as specified on the Document Settings tab.
- 2 A check will be performed to verify the existence of a virtual document with the same name as the document object from step 1.
 - If it exists, the virtual document will be checked out, versioned, and checked back in to the Documentum repository.
 - If it does not exist, the document object will be converted to a virtual document and given the same name as the document object.
- 3 eDocuments will then be added to a document object in the order that they are imported. The document object(s) will be saved within their perspective virtual document. Each document object will be named based on the file name and extension supplied by Kofax Capture. In addition, all eDocuments will be exported using the format name suggested by Documentum for the file being exported.

For example, a Word document written in Microsoft Word 2002 would get a suggested format name of “Word 97 / 2002 document.” When viewed in the Documentum Desktop Client, the Word document object’s format name attribute would have a value of “Word 97 / 2002 document.” In addition, the user can double-click on the Word document and view it in the Microsoft Word program.

As an example, consider the following list of single page images and eDocument files scanned or imported into a specified cabinet or folder. Note that eDocuments are only imported.

1. xls
2. tif
3. tif
4. xls
5. xls
6. tif

For this case, the structure in the Documentum repository would be as shown in the figure below.

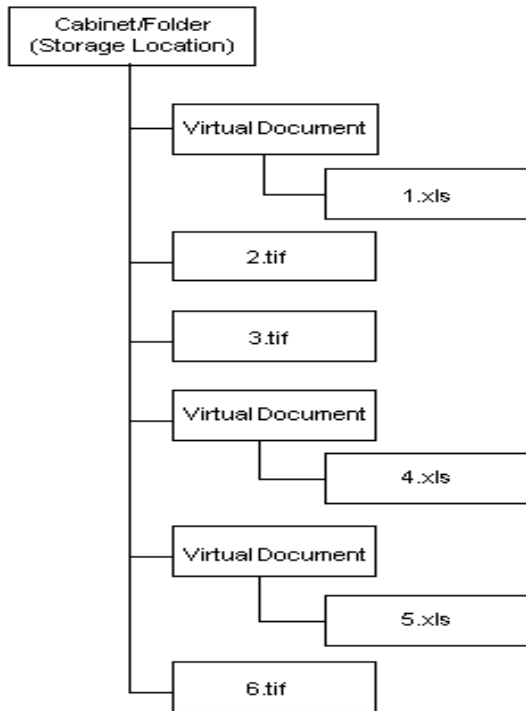


Figure 1. Store to a Cabinet / Folder

Storing to a Virtual Document

If a document to be exported contains eDocuments and the “Store to Virtual Document” option is selected on the Storage Settings tab, the following will occur:

- 1 The virtual document specified on the Storage Settings tab will be checked out, versioned, and checked back in to the Documentum repository.
- 2 Each image, if available, will be added to a newly created document object. The images will be stored using the same image content type (file format). The document object will be given the name of the document (object_name) as specified on the Document Settings tab. The document object will then be converted to a virtual document and given the same name as the document object.
- 3 If no images are available, a virtual document will be created to contain the eDocuments (see step 4). The virtual document will be given the name of the document (object_name) as specified on the Document Settings tab.
- 4 eDocuments will then be added to the newly created document objects in the order that they are imported. The document objects will be saved within their perspective virtual document. Each document object will be named based on the file name and extension supplied by Kofax Capture. In addition, all eDocuments will be exported using the format name suggested by Documentum for the file being exported.

- 5 The newly created virtual document (from step 2 or 3) will be added to the virtual document storage location as specified on the Storage Settings tab.

As an example, consider the following list of single page images and eDocument files scanned or imported into a document. Note that eDocuments are only imported.

1. xls
2. tif
3. tif
4. xls
5. xls
6. tif

For this case, the structure in the Documentum repository would be as shown in the figure below.

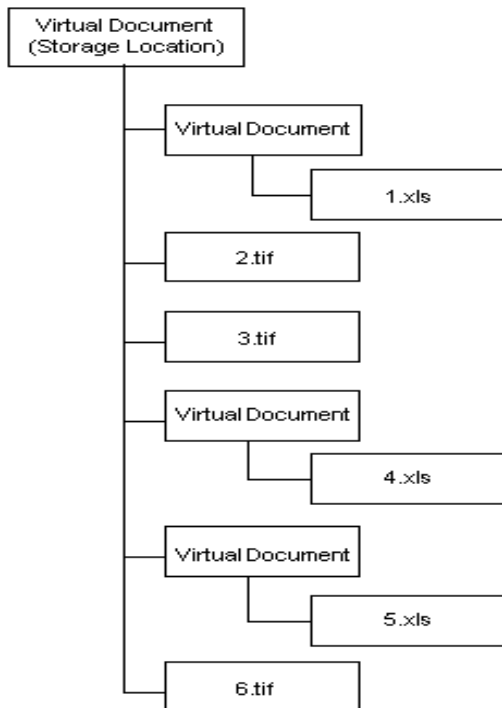


Figure 2. Store to a Virtual Document

Source Code

The source code for the this export connector is provided and it is located on the installation CD in the Documentum\Documentum6 folder. The source code can be opened, edited, and compiled in Visual Basic 6.0 with Service Pack 6.

► To modify the export connector

- 1 Install the Documentum export connector. Refer to *Installing the Export Connector* on page 6 for the installation instructions. When you install the Documentum export connector, you will install the required components referenced in the source code.
- 2 Open, make any desired modifications, and compile the Documentum source code in Visual Basic.
- 3 Copy the DCMTRel6_v75.dll to the installation directory (for example, C:\Program Files\Ascent\CAP\Documentum\Documentum6\DCMTRel6_v75.dll). When you are

prompted to replace the existing file, select “Yes.” You will need to repeat this procedure on each Administration and Export workstation that will be using the Documentum export connector.

Note In order to successfully modify and compile the export connector, development must occur on a workstation with the appropriate versions of Kofax Capture, CAPTools, and the Documentum DFC previously installed. To use the modified export connector, you must replace the Documentum export connector DCMTRel6_v75.dll with the modified version on the client workstation. If you receive an access denied error, you will need to close the Administration module.

Refer to the documentation that came with your Documentum product and Visual Basic documentation for assistance.

Kofax Technical Support

For additional technical information about Kofax products, visit the Kofax Web site at www.kofax.com and select an appropriate option from the Support menu. The Kofax Support pages provide product-specific information, such as current revision levels, the latest drivers and software patches, online documentation and user manuals, updates to product Release notes (if any), technical tips, and an extensive searchable knowledgebase.

The Kofax Web site also contains information that describes support options for Kofax products. Please review the site for details about the available support options.

If you need to contact Kofax Technical Support, please have the following information available:

- Kofax Capture software version
- Documentum export connector version
- Operating system and Service Pack version
- Network and client configuration
- Copies of your error log files
- Information about your export connector

