

# **KOFAX Capture**

Release Notes for Ascent® 7.0  
Release Script for  
Documentum 5.1-5.3



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## Introduction

This document contains the release notes for the Ascent 7.0 Release Script for Documentum, which supports Documentum 5.1, Documentum 5.2, Documentum 5.2.5, Documentum 5.3, and Documentum 6.0. This release script releases 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 Ascent Capture Help or printed documentation.

## Additional Documentation

These release notes are a supplement to the following:

- *Ascent Capture Advanced Features Guide*
- Ascent Capture Release Notes
- *Getting Started with Ascent Capture* guide
- *Installation Guide for Ascent Capture and Ascent Capture Internet Server*
- *Learning Ascent Capture* guide
- Help provided from any of the Ascent Capture modules
- Help provided with the Ascent 7.0 Release Script for Documentum

For more information about Documentum or other Documentum products, contact your Documentum representative or refer to the documentation that came with your Documentum product.

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**Tip** For additional information about Kofax products, visit our Web site at [www.kofax.com](http://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.

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## System Requirements

The Ascent 7.0 Release Script for Documentum requires the following components to be installed prior to installing this release script.

### Documentum Server Support

The Ascent 7.0 Release Script for Documentum 5.1-5.3 supports the following Documentum Content Servers:

- Documentum 5.1 Content Server
- Documentum 5.2 Content Server
- Documentum 5.2.5 Content Server
- Documentum 5.3 Content Server
- Documentum 6.0 Content Server

### Client Operating System Support

The Ascent 7.0 Release Script for Documentum 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

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**Note** At the time of publishing these release notes, the Ascent 7.0 Release Script for Documentum was certified with the Service Packs listed above.

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### Administration and Release Workstations – Additional Requirements

The Ascent Capture Administration and Release workstations must have the following components installed:

- Ascent Capture 7.0, 7.5, or Kofax Capture 8
- DFC 5.3 (API)

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**Warning** The DFC 6.0 API installed with the Documentum Desktop Client 5.3 SP 5.5 is not compatible with the release script. Do not install Desktop Client 5.3 SP 5.5 (or DFC 6.0) on the same workstation as the release script.

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### Problems With Documentum 5.2.5 Service Pack 1

Due to a limitation with Documentum 5.2.5 with Service Pack 1, you will not be able to release to Documentum's Lifecycle Management process. To use the lifecycle process, you must upgrade to Service Pack 2 for Documentum 5.2.5. (SPR 00010467)

Notice that you must update the Documentum Content Server 5.2.5 and the Documentum Desktop Client 5.2.5 with Service Pack 2.

Refer to the Documentum Web site or contact your Documentum representative.

## Source Code

The source code for the Ascent 7.0 Release Script for Documentum is provided and it is located on the Ascent 7.0 Release Script for Documentum 5.1-5.3 installation CD in the Documentum\Documentum5 folder. The source code can be opened, edited, and compiled in Visual Basic 6.0 with Service Pack 6.

### ► To modify the release script

- 1 Install the Documentum release script. Refer to *Installing the Release Script* on page 12 for the installation instructions. When you install the Documentum release script, 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 DCMTRel5\_v7.dll to the installation directory (for example, C:\Program Files\Ascent\CAP\Documentum\Documentum5\DCMTRel5\_v7.dll). When you are prompted to replace the existing file, select "Yes." You will need to repeat this procedure on each Administration and Release workstation that will be using the Documentum release script.

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**Note** In order to successfully modify and compile the release script, development must occur on a workstation with the appropriate versions of Ascent Capture, CAPTools, and the Documentum DFC previously installed. To use the modified release script, you must replace the Documentum release script DCMTRel5\_v7.dll with the modified version on the client workstation. If you receive an access denied error, you will need to close the Administration module.

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

## Features

This section contains information about features provided with the Ascent 7.0 Release Script for Documentum.

### Ascent Capture Values / Documentum Properties

The Documentum release script provides an easy-to-use interface for linking Ascent Capture Ascent Values to Documentum document properties and folder properties. Examples of Ascent Values include Document index fields, Folder index fields, Batch fields, Ascent Capture Values, and Text Constants.

### Ascent Capture Value {Document GUID}

The Ascent Capture Value {Document GUID} is a new value that can be used for index fields and release values. This Ascent Capture value is a type of document ID that is unique across the central site and all remote sites that comprise an Ascent 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 Release Scripts

The Ascent Capture Release Script Information Interchange feature is useful when more than one release script has been configured for a particular batch class and document class combination.

The sharing of information is accomplished by allowing the release scripts to pass information to other release scripts. The Ascent Capture Value {Repository Document ID} is used to store and retrieve the RepositoryDocumentID that will be used by the first invoked release script. Therefore, the first release script that runs can set this value, and subsequent release scripts can read the same value.

Notice that when you are passing the RepositoryDocumentID information to a different release script, the release script must exist within the same document class using multiple release. In addition, the release script that is passing the RepositoryDocumentID information must be placed first in the list on the Release Scripts dialog box. For example:

```
Documentum 5.1-5.3
Ascent Capture Text
```

Only the first release script can set the RepositoryDocumentID value. Subsequent release scripts can only read this value.

Refer to your Ascent Capture online Help for more information about configuring the RepositoryDocumentID. You can display Ascent Capture online Help from the Help menu available from any Ascent Capture module. Alternatively, you can click Start | Programs | Ascent Capture | Ascent Capture Help.

## Integrated Release Setup

The Ascent 7.0 Release Script for Documentum provides an easy-to-use setup dialog box available from the Ascent Capture Administration module. This dialog box allows you to specify release settings at batch class setup time that control how documents are released into your Documentum repository.

Refer to the section *Setting Up the Release Script* on page 18 for more information.

## Image Support

The Ascent 7.0 Release Script for Documentum 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

With the Ascent 7.0 Release Script for Documentum, you can release Kofax PDF documents into your Documentum repository. Kofax PDF is bundled with Ascent Capture and does not require additional software implementation. Kofax PDF documents can be saved in the following output types:

- Image Only
- Image + Text files

For more information about Kofax PDF documents, refer to *Kofax PDF Options* on page 9.

### Adobe Acrobat Capture PDF Support

The Ascent 7.0 Release Script for Documentum 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 Ascent Capture product. To release Adobe Acrobat Capture PDF documents, you must install the Adobe® Acrobat Capture® 3.04 Clustered or Personal Edition software.

For more information about Adobe Acrobat Capture PDF documents, refer to *Adobe Acrobat Capture Options* on page 10.

### **OCR Full Text Support**

With the Ascent 7.0 Release Script for Documentum, you can release documents processed through the Ascent Capture OCR Full Text module into your Documentum repository.

For more information, refer to *OCR Full Text Options* on page 8.

### **eDocument Support**

With the Ascent 7.0 Release Script for Documentum, you do not need to limit your batches to image files. eDocuments are supported for release into Documentum as renditions.

For more information refer to *Releasing eDocuments Only (Without Image Files)* on page 8 and *Appendix A – Releasing eDocuments* on page 31.

### **Online Help Provided for Release Setup**

The Ascent 7.0 Release Script for Documentum online Help is installed with your release script. It is available from the Administration module when you are setting up your release script. You can click the Help button from the Ascent 7.0 Release Script for Documentum 5.1-5.3 – Release Setup dialog box to display help information about release options.

## Additional Information

This section contains additional information about the Ascent 7.0 Release Script for Documentum.

### Unsupported Ascent Capture Features

Ascent 7.0 Release Script for Documentum does not support the following Ascent Capture features.

#### SecurityBoost

The Ascent 7.0 Release Script for Documentum does not support the Ascent Capture SecurityBoost feature. The SecurityBoost feature allows you to enhance Ascent Capture security for systems using Microsoft Windows XP or Windows 2000. If security is an issue, run the release script on a protected computer.

If the SecurityBoost feature is enabled for Ascent 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 `release.exe /NoBoost` (For example, "`C:\Program Files\Ascent\Bin\release.exe`" /NoBoost).
- 3 Click OK.

Refer to your Ascent Capture online Help for more information about the SecurityBoost feature. (Ascent Capture online Help keyword: *SecurityBoost > enabling · SecurityBoost > disabling*)

#### File Name Retention

The Ascent 7.0 Release Script for Documentum does not support file name retention. This means that the original imported file name will not be retained and the default numeric name will be used.

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**Tip** The Ascent 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 Ascent Values. 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 release may fail.

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### {Index Operator's Station ID} Ascent Capture Value

The Ascent 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)

In the Ascent 7.0 Release Script for Documentum, all eDocuments are released into Documentum as rendition documents. This means that when you release 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 released as the primary document (eDocuments only).

## OCR Full Text Options

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

Refer to the Ascent 7.0 Release Script for Documentum online Help for details about how OCR full text files and non-image files are released to the Documentum repository (online Help keyword: *File format combinations*).

### ► To enable OCR full text processing for a document class

- 1 From the Create Document Class dialog box or Document Class Properties dialog box, select the OCR tab.
- 2 Check the Enable OCR full text check box to enable OCR full text processing for the document class.
- 3 Click Apply to save your settings without closing the dialog box. Click OK to save your settings and close the dialog box.

### ► To add the OCR Full Text module to a batch class

- 1 From the Create Batch Class dialog box or Batch Class Properties dialog box, select the Queues tab.
- 2 Select OCR Full Text from the list of Available Queues, and click Add.
- 3 Click Apply to save your settings without closing the dialog box. Click OK to save your settings and close the dialog box.

For more information about OCR full text processing, refer to the *Getting Started with Ascent Capture* guide.

## Kofax PDF Options

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

Refer to the Ascent 7.0 Release Script for Documentum online Help for details about how Kofax PDF documents and non-image files are released to the Documentum repository (online Help keyword: *File format combinations*).

### ► To add the Kofax PDF Generator module to a batch class

- 1 From the Create Batch Class dialog box or Batch Class Properties dialog box, select the Queues tab.
- 2 Select PDF Generator from the list of Available Queues, and click Add.
- 3 Click Apply to save your settings without closing the dialog box. Click OK to save your settings and close the dialog box.

### ► To enable Kofax PDF generation for a document class

- 1 From the Create Document Class dialog box or Document Class Properties dialog box, select the PDF tab.
- 2 Check the Enable Kofax PDF generation check box to enable Kofax PDF processing for the document class.
- 3 Click Apply to save your settings without closing the dialog box. Click OK to save your settings and close the dialog box.

For more information about creating Kofax PDF documents, refer to the *Getting Started with Ascent Capture* guide.

## Adobe Acrobat Capture Options

The Ascent 7.0 Release Script for Documentum supports Adobe Acrobat Capture. This section contains information related to using Adobe Acrobat Capture for your Adobe PDF documents.

For additional details about creating Adobe Acrobat Capture PDF documents, refer to the documentation that came with your Adobe Acrobat Capture product.

Refer to the Ascent 7.0 Release Script for Documentum online Help for details about how Adobe Acrobat Capture PDF documents and non-image files are released to the Documentum repository (online Help keyword: *File format combinations*).

### Operating System Requirements for Ascent Capture

To release Adobe PDF documents, your Ascent Capture Administration and Release 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 Ascent Capture.

### Adobe Acrobat Capture and the Ascent Capture Release Workstation Installations

During the conversion process, communication needs to occur between Adobe Acrobat Capture and the Ascent Capture Release module. However, due to timing conflicts, Adobe Acrobat Capture and Ascent Capture cannot be run at the same time on a workstation. Therefore, Adobe Acrobat Capture and Ascent 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 Ascent Capture Release because it disrupts the automated process of releasing Adobe PDF documents.

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### **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 Ascent Capture Standalone Workstations**

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

### **Re-releasing Documents in Error**

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

### **Invalid Watched Folders**

If you attempt to release documents to an invalid Adobe Acrobat Capture watched folder, the documents will be rejected. To cancel the release, click Cancel on the Ascent Capture PDF Release dialog box displayed at the Release workstation. The Cancel button will automatically cancel the Adobe Acrobat Capture documents.

## Installing the Release Script

You can install the Ascent 7.0 Release Script for Documentum on an Ascent Capture client workstation or standalone workstation.

### Important Notes About Installing the Release Script

To install the Ascent 7.0 Release Script for Documentum you must have Windows administrator privileges. If you do not have administrator privileges and install this release script, you may receive error messages and several of the files may not install correctly.

Before you install the Ascent 7.0 Release Script for Documentum, refer to *System Requirements* on page 2 for information about installation requirements.

#### Separate Computers

You must install the Ascent Capture software and the Documentum server components on *separate* computers. If you install Documentum and Ascent 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 7.0 Release Script for Documentum.

#### ► To install the release script

- 1 Insert your Ascent 7.0 Release Script for Documentum 5.1-5.3 installation CD into your CD drive.
- 2 From your Windows task bar, select Start | Run, browse to the Documentum\Documentum5 folder on the CD, and run Setup.exe. The installation program will start.
- 3 Follow the instructions on your screen to install the release script.
- 4 When the installation is complete, a message will display that indicates the release script was successfully installed.

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**Note** Installing the release script automatically registers it with Ascent Capture.

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- 5 Repeat this procedure on all Administration and Release workstations that will use the Ascent 7.0 Release Script for Documentum.

## Upgrading the Release Script

If you are currently using Ascent 6.0 Release Script for Documentum, you can upgrade to the Ascent 7.0 Release Script for Documentum, if desired. All release setup settings will be retained.

### Important Notes About Upgrading the Release Script

To upgrade to the Ascent 7.0 Release Script for Documentum you must have Windows administrator privileges. If you do not have administrator privileges and upgrade this release script, you may receive error messages and several of the files may not upgrade correctly.

Before you upgrade to the Ascent 7.0 Release Script for Documentum, refer to *System Requirements* on page 2 for information about installation requirements.

### Upgrade Instructions

Use the following instructions to upgrade to the Ascent 7.0 Release Script for Documentum.

#### ► To upgrade the release script

- 1 Release any existing batches associated with the release scripts. Refer to *Releasing Batches* on page 25.
- 2 From the Definitions panel in the Administration module, select the Batch class tab and right-click the applicable document class associated with the release script. (Expand the batch class item to select associated document classes.) A context menu will display.
- 3 From the context menu, select “Release Scripts.” The Release Scripts dialog box will display.
- 4 From the Release Scripts dialog box, ensure that the older version of the Documentum release script is selected from the list of Assigned Release Scripts (on the right-hand side of the screen). Then, select the “Documentum 5.1-5.3” release script for the list of Available Release Scripts (on the left-hand side of the screen).
- 5 Click Upgrade. When you are prompted to confirm that you want to upgrade, click Yes.

Once you have upgraded, you should log on to the Ascent 7.0 Release Script for Documentum and verify that all the settings are correct.

Before you can use the upgraded release script, you must republish the associated batch class. Refer to *Publishing a Batch Class* on page 24 for instructions.

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**Note** It is recommended that you run some sample batches through the system to test the operation of the release script.

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## Application Maintenance

This section describes how to repair and remove the Ascent 7.0 Release Script for Documentum.

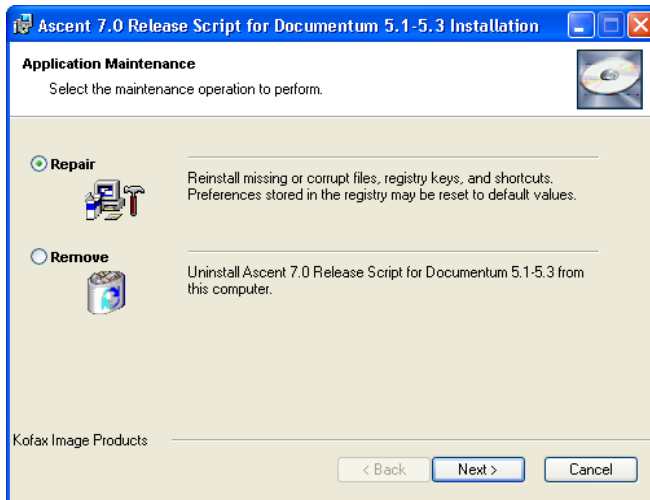


Figure 1. Application Maintenance Dialog Box

### Repairing the Release Script

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

► **To repair the release script**

- 1 Insert your Ascent 7.0 Release Script for Documentum 5.1-5.3 installation CD into your CD drive.
- 2 From your Windows task bar, select Start | Run, browse to the Documentum\Documentum5 folder on the CD, and run Setup.exe.
- 3 Setup will detect an existing installation and the Application Maintenance dialog box will display, as shown in Figure 1.
- 4 From the Application Maintenance dialog box, ensure that the “Repair” option is selected and then click Next.
- 5 Follow the instructions on the screen to repair the release script.
- 6 When the repair is complete, a message will display that indicates the release script was successfully installed.

## Removing the Release Script

The Remove option will delete the release script.

► **To remove the release script**

- 1 Insert your Ascent 7.0 Release Script for Documentum 5.1-5.3 installation CD into your CD drive.
- 2 From your Windows task bar, select Start | Run, browse to the Documentum\Documentum5 folder on the CD, and run Setup.exe.
- 3 Setup will detect an existing installation and the Application Maintenance dialog box will display, as shown in Refer to Figure 1 on page 14.
- 4 From the Application Maintenance dialog box, select “Remove” and then click Next.
- 5 Follow the instructions on the screen to delete the release script.
- 6 When the uninstallation is complete, a message will display that indicates the release script was successfully uninstalled.

Alternatively, you can use the Add or Remove Programs utility from the Windows Control Panel to uninstall your Ascent 7.0 Release Script for Documentum.

Refer to your Microsoft documentation for more information about the Add or Remove Programs utility.

Refer to *Problems When Uninstalling the Release Script* on page 26 for information about a known problem.

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**Note** After uninstalling, your Ascent 7.0 Release Script for Documentum release script will continue to display in the Release Script Manager, although it will not be functional. To remove the release script from the list, you must go into every batch class and associated document class, select the applicable release script from the Assigned Release Scripts list, and click Remove. You must do this for every instance of the Documentum release script. After all references to the release script are removed, you will be able to delete the Documentum release script from the Release Script Manager.

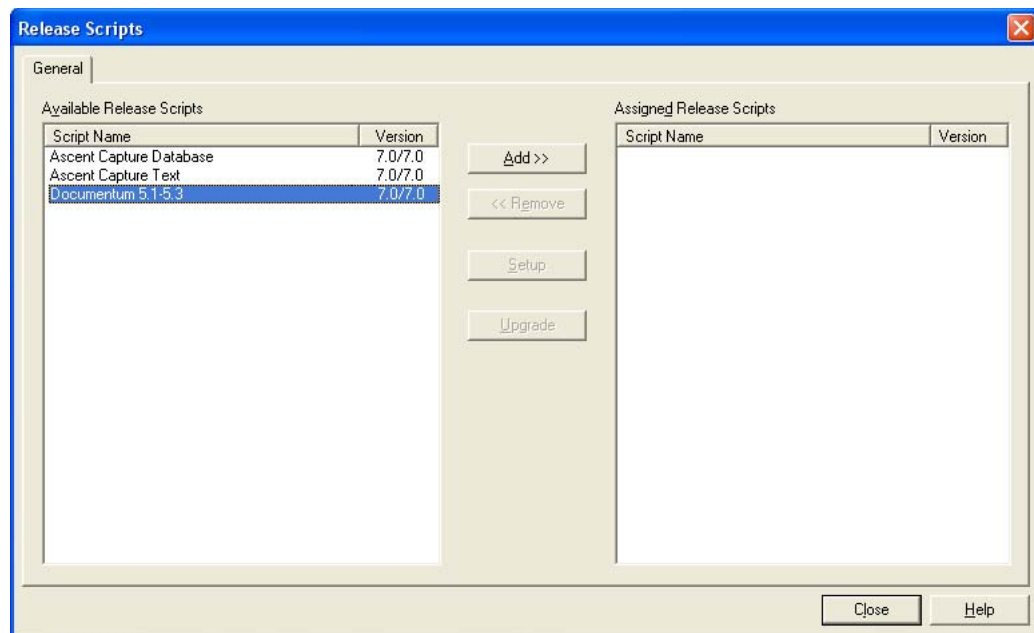
---

## Logging On to the Release Script

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

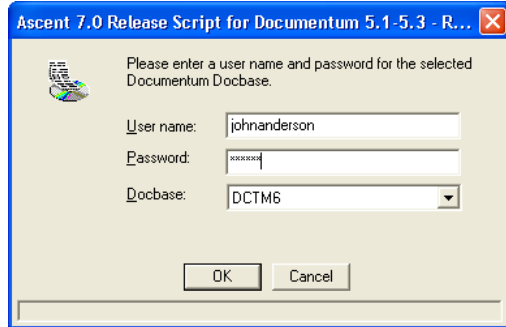
### ► To log on to the release script

- 1 Start the Ascent 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 "Release Scripts." The Release Scripts dialog box will display.



**Figure 2. Release Scripts Dialog Box**

- 4 The Release Scripts dialog box lists all available release scripts. Available release scripts are those that are registered with Ascent Capture. From the Release Scripts dialog box, select the "Documentum 5.1-5.3" release script, and click Add. The Ascent 7.0 for Documentum 5.1-5.3 – Login Information dialog box will display, as shown in Refer to Figure 3 on page 17.
- 5 Enter your Documentum user name, password, and the desired Documentum repository. (The user name and password are case-sensitive.) The login information will be saved for use at release time.



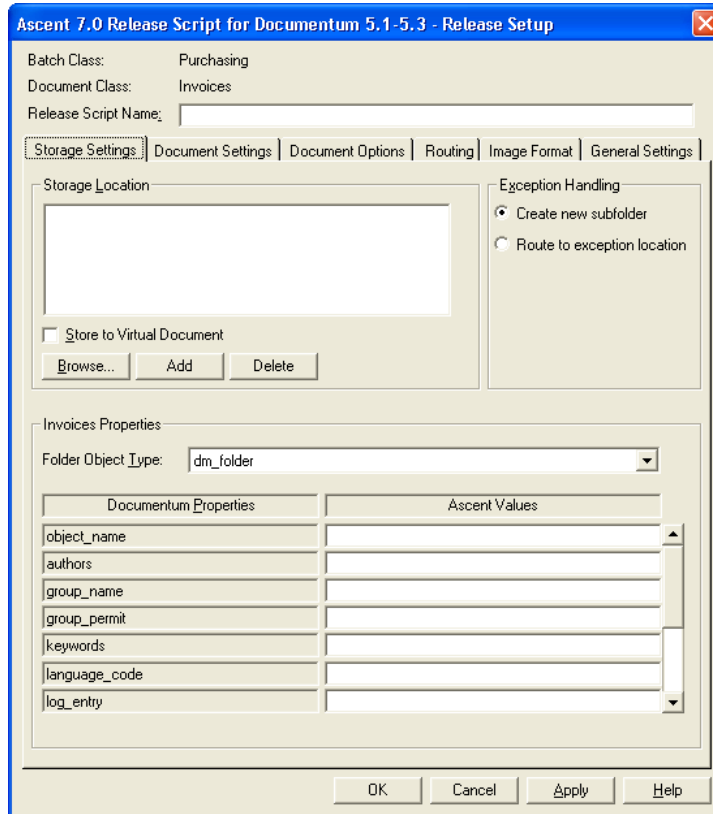
**Figure 3. Ascent 7.0 for Documentum 5.1-5.3 – Login Information Dialog Box**

---

**Note** The login information will be saved and used during Release.

---

- 6 Click OK. The Ascent 7.0 Release Script for Documentum 5.1-5.3 - Release Setup dialog box will display, as shown in Figure 4.



**Figure 4. Ascent 7.0 Release Script for Documentum 5.1-5.3 – Release Setup Dialog Box**

- 7 Refer to the next section, *Setting Up the Release Script*, for information about the set up options.

## Setting Up the Release Script

The following sections describe the setup options available with the Ascent 7.0 Release Script for Documentum.

---

**Note** For more details about the available setup options, refer to the online Help available from the Ascent 7.0 Release Script for Documentum 5.1-5.3 – Release Setup dialog box.

---

### Storage Settings Tab

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

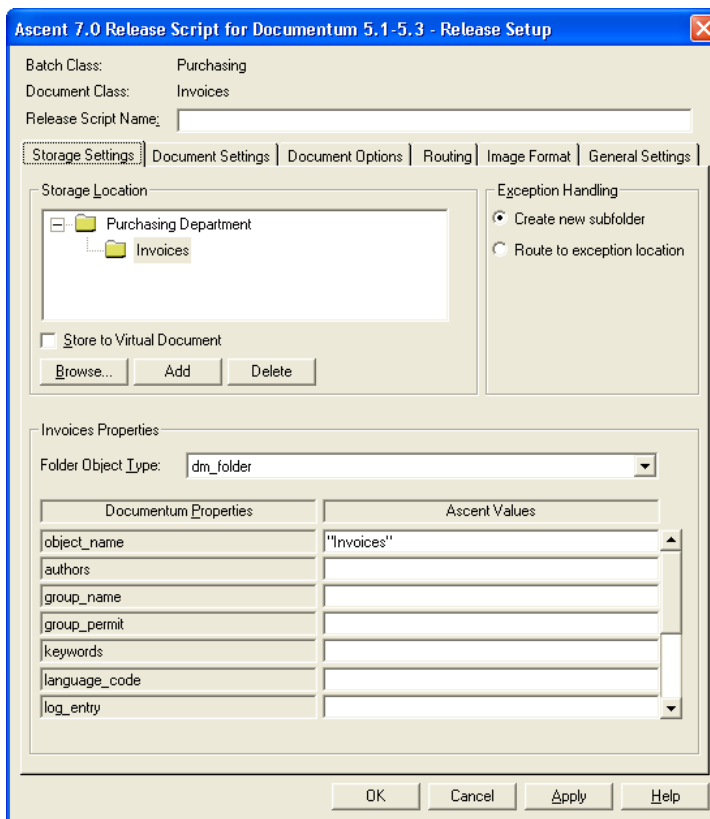


Figure 5. Storage Settings Tab

## Document Settings Tab

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

Ascent 7.0 Release Script for Documentum 5.1-5.3 - Release Setup

Batch Class: Purchasing  
 Document Class: Invoices  
 Release Script Name:

Storage Settings | **Document Settings** | Document Options | Routing | Image Format | General Settings

Document Object Name: Batch Class Name  
 Object Type:

Dynamically select object type at release using the following Ascent Value:

Index Links

Documentum Properties	Ascent Values
object_name*	{Batch Class Name}
authors	{User Name}
group_name	{\$Company Name}
group_permit	Invoice Number

Asterisk denotes search field (e.g. object\_name\*).

Document Versioning

Allow duplicate documents

If Document Exists, Release As:  
 Minor version  
 Major version  
 Exception object

If Unable to Version, Release As:  
 Branch version  
 Exception object

Create New Version From:  
 Current version  
 Latest version

Release document as current version    Symbolic version label:

Figure 6. Document Settings Tab

## Document Options Tab

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

The screenshot shows a dialog box titled "Ascent 7.0 Release Script for Documentum 5.1-5.3 - Release Setup". The "Document Options" tab is selected. The "Batch Class" is set to "Purchasing" and the "Document Class" is set to "Invoices". The "Release Script Name" field is empty. The "Permissions Set" section has the "Select Permissions Set" radio button selected, with a dropdown menu showing "Acl\_DAB\_AppRef". Below this, there are two columns of text boxes labeled "Permissions Set" and "Ascent Values", with a "Permissions Set" label below the first column. There are two unchecked checkboxes: "Set Full Text Indexing" and "Convert document to Virtual Document". The "Save exceptions in:" section has a text box containing "Exceptions" and a "Browse..." button. At the bottom, there are "OK", "Cancel", "Apply", and "Help" buttons.

Figure 7. Document Options Tab

## Routing Tab

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

The screenshot shows the 'Routing' tab of the 'Ascent 7.0 Release Script for Documentum 5.1-5.3 - Release Setup' dialog box. The window title bar includes a close button. The main area is divided into several sections:

- Batch Class:** Purchasing
- Document Class:** Invoices
- Release Script Name:** [Empty text field]
- Navigation Tabs:** Storage Settings | Document Settings | Document Options | **Routing** | Image Format | General Settings
- Document Lifecycle:**
  - Promote document to next lifecycle state (If document is already part of a lifecycle).
  - Document Lifecycle:** (None) [Dropdown]
  - State:** [Dropdown]
  - Alias Set:** [Dropdown]
- Document Workflow:**
  - Selected Template:
    - [Empty text field]
    -
  - Dynamically Select Template At Release:
    - [Empty text field]
- Distribution:**
  - To:** [Empty list area]
  - 
  - Instructions:** [Empty text area]
  - Priority:** Low [Dropdown]

At the bottom of the dialog are four buttons: , , , and .

Figure 8. Routing Tab

## 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.

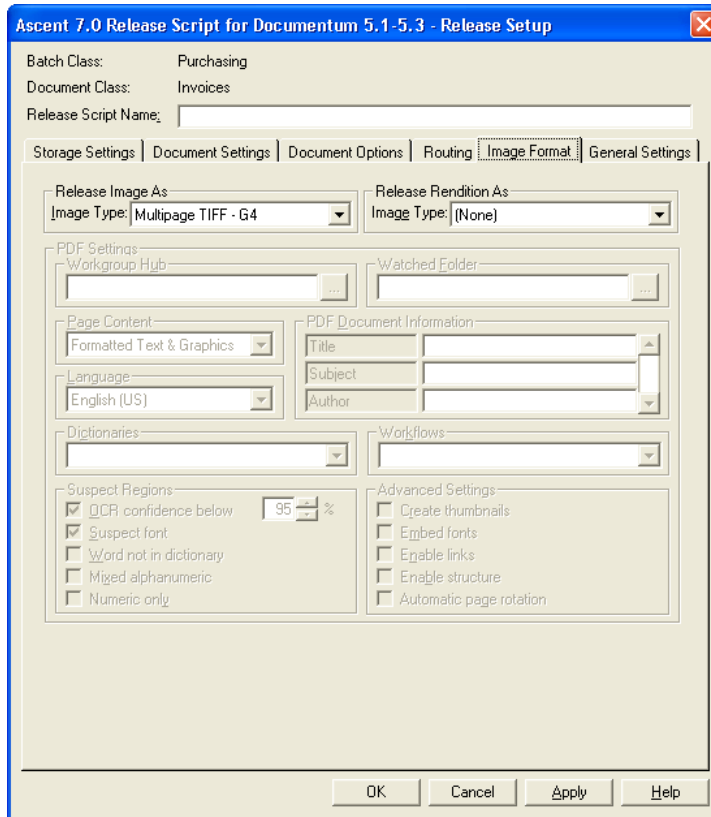


Figure 9. Image Format Tab

## General Settings Tab

This tab allows you to specify a temporary storage location to be used at release 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 release the separator sheets.

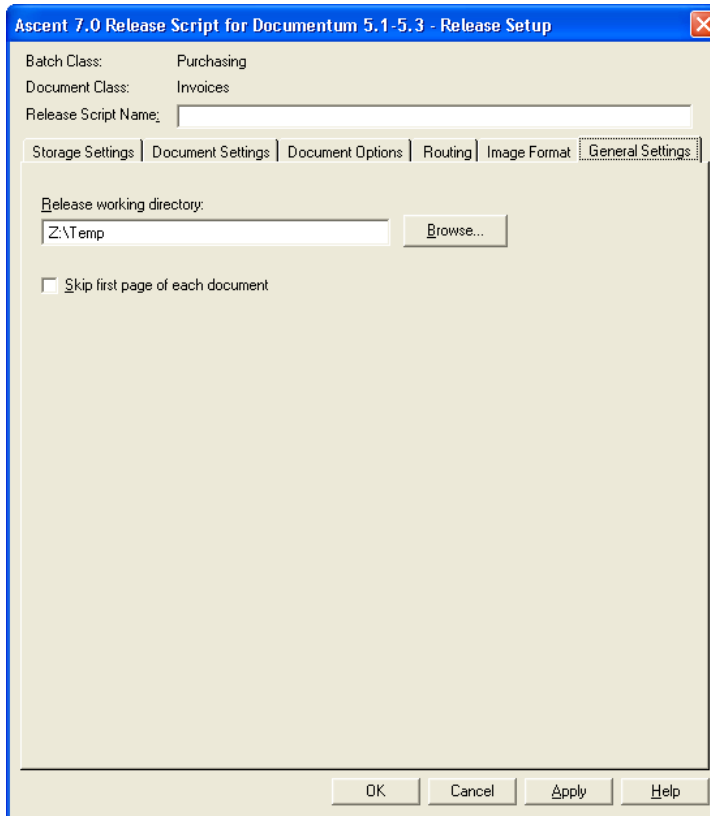


Figure 10. General Settings Tab

## Publishing a Batch Class

After you select all your batch class settings, you must publish your batch class before you can use it. The publishing process checks the integrity of the settings in your batch class, and makes the batch class available for use. If problems are found with any of the settings, error and warning messages will be displayed along with recommended actions for fixing the problems.

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.

### ► To publish a batch class

- 1 Start the Ascent Capture Administration module. The module's main screen will display.
- 2 Select the Batch class tab from the Definitions panel, and right-click the applicable batch class. A context menu will display.
- 3 From the context menu, select "Publish." The Publish dialog box will display.
- 4 From the Publish dialog box, select your batch class and click Publish. Ascent Capture will check all of your batch class settings and display the results in the Results box.
  - a If no problems are detected, the message "Publishing successful" will display.
  - b If problems are detected, warning/error messages will display along with recommended actions to resolve the problems. Perform the recommended actions, and then try to publish the batch class again.
- 5 Run some sample batches through the system to test the operation of the release script.

After successfully publishing, you can create batches based on your batch class. As your batches flow through your Ascent Capture system, they will be routed from module to module. The modules that are used to process a batch, and the order that processing occurs, are specified as part of the batch class definition for the batch.

Refer to the Ascent Capture online Help for more information about batch classes (Ascent Capture online Help keyword: *Batch classes > about*).

## Releasing Batches

With the Ascent 7.0 Release Script for Documentum, the Ascent Capture Release module will process batches based on the settings of the associated batch classes. The Release module is responsible for releasing documents, as well as index data using the attributes defined during release setup.

The Ascent Capture Release module usually runs as an unattended module on a Windows workstation, periodically polling the Release module for available batches. The Release module may be configured to run during off-hours to avoid any impact to the throughput of Ascent Capture and/or the network system. To start the Release module, select Start | Programs | Ascent Capture | Release. All batches queued for release will be released after initiation of the Release module.

---

**Note** Refer to your Ascent Capture online Help for more information about configuring the Release module (Ascent Capture online Help keyword: *Release module > about*). You can display Ascent Capture online Help from the Help menu available from any Ascent Capture module. Alternatively, you can click Start | Programs | Ascent Capture | Ascent Capture Help.

---

### ► To release a batch

- 1 Start the Ascent Capture Release module. The module's main screen will display. Any batches waiting to be released will be processed.
- 2 Once your batch is released, it will be removed from Ascent Capture. If any documents or pages are rejected, the batch will be routed to the Ascent Capture Quality Control module. If successful, each document's item ID number will display in the Release module event log.
- 3 When you want to exit the Release module, select Batch | Exit from the Release module's menu bar.

## Known Problems

This section contains information about known problems with the Ascent 7.0 Release Script for Documentum.

### Viewing Documentum Documents Released as Single Page TIFF Images

A document viewer is required to view documents that have been released as single page TIFF images. However, with some document viewers, only the first page of the multipage TIFF image can be viewed. You can open and view the document in Cpio, Windows 2000, or Visual Basic Demo. Alternatively, you can convert the document to a different format in order to view the contents of the file. (SPR 00023762)

### Problems When Installing On Windows XP

If you are installing the Ascent 7.0 Release Script for Documentum on a Windows XP Professional operating system and you specify a mapped drive, you will receive the following error message. (SPR 31250)

Error 1904. Module *<mapped drive>* failed to register. HRESULT -2147467259. Contact your support personnel .

**Workaround:** The error message is incorrect and can simply be ignored. Click the Ignore button and the release script will successfully install and register the release script.

If you click the Abort button, the installation will end. If you click the Retry button, you will receive the error message again.

### Problems When Uninstalling the Release Script

If you click the Cancel button while you are uninstalling the release script, all the release script original files will remain properly installed on the system. However, depending on the point during the uninstallation that the Cancel button is clicked, the release script may be un-registered. In such a case, once you attempt to log on to the release script, login will fail. (SPR 31221)

**Workaround:** If the problem occurs, run Repair.

Refer to *Repairing the Release Script* on page 14 for more information. Alternatively, you can re-register the release script in the Release Script Manager.

### Documentum DM\_TIME

The Ascent Capture TIME data type does not support Documentum properties of the DM\_TIME index. If the TIME data type is linked to the Documentum DM\_TIME index, the release will fail. (SPR 21931)

The Ascent Capture DATE data type is compatible with the Documentum DM\_TIME type. In this case, the date will be submitted to Documentum but the time fields will be zero.

**Workaround:** Define a custom time/date field as a VARCHAR data type in Ascent Capture and ensure that the time value is entered in the *mm/dd/yyyy hh:mm:ss* format.

## Versioning Documents With Duplicate Names

If versioning is enabled and you attempt to release a document with the same name as one that already exists in the Documentum repository, the document being released may not be versioned. This is because Documentum allows duplicate document names within a folder, which may cause problems when searching for documents with identical names. (SPR 00009808)

For example, assume that the Documentum repository contains two documents named Doc01. When releasing documents, the release script will search the repository until it finds the *first occurrence* of a document with the name Doc01. Then, the script will use the document ID of that document to search within the virtual document for an occurrence of the document. If the document ID exists in the virtual document, the release script will version the document. However, if the document ID does not exist in the virtual document, the script will assume that the document being released is a new document and create a duplicate document within the virtual document.

**Workaround:** To ensure uniqueness within a virtual document, define search fields that determine if a released document is a duplicate or needs to be versioned. To define search fields, click the Search Fields button from the Document Settings tab. The Select Search Fields dialog box will display, allowing you to select Documentum properties to use as search fields. All Documentum properties associated with the selected object type will be available.

For more information, click the Help button from the Document Settings tab.

## Search Fields Fail With Repeating Attributes

When using repeating attributes that contain multiple values for search fields, documents will not be versioned properly at release. Instead, duplicate documents will be created. No error will be generated. (SPR 00009793)

**Workaround:** With search fields, use single values for repeating attributes.

## Releasing to a Workflow Requires Input Port 0

Released documents can be sent to a Documentum workflow, as long as the initial step of the workflow accepts documents on input port 0. If this is not the case, the following error will occur, release will fail, and the batch will be sent to the Ascent Capture Quality Control module. (SPR 26786)

```
The package <package name> is not in the specified input port, Input: <port number>. ;
ERRORCODE: 100; NEXT: null] Please update your workflow so the initial step is set to
input port 0, remove the released documents from 4i, and run the batch again.
```

**Workaround:** To resolve the problem, redefine the first step in the workflow to use input port 0. Open your batch in the Ascent Capture Quality Control module, clear the rejected status, and then process the batch.

Refer to the documentation that came with your Documentum product for details about defining workflows.

## Image Folders Left Behind in Release Working Directory

When releasing single page images only, the image folders for those images will be left behind in the Release Working directory. Over time, many empty folders may accumulate in the Release Working directory. (SPR 00009737)

**Workaround:** Manually delete empty folders in the Release Working directory. The Release Working directory is specified from the General Settings tab during release setup.

## Creating Versions When Releasing Existing Documents

Ascent Capture's release operation does not properly create a new version of an existing document, instead it creates a duplicate document name even if the "allow duplicate documents" check box is unchecked. The problem occurs when using the default search field, "object\_name," to identify that a document of the specified name already exists. (SPR 00009785)

**Workaround:** When using the default search field to locate documents with duplicate names and the "allow duplicate documents" check box is unchecked, you should define at least one additional search field with a specific value that matches the document that needs to be versioned. To define search fields, click the Search Fields button from the Document Settings tab. The Select Search Fields dialog box will display, allowing you to select the Documentum properties to use as search fields.

For more information on specifying search fields, click the Help button from the Document Settings tab.

## Releasing eDocuments

The following sections describe known problems when releasing eDocuments.

### Using Adobe Acrobat Capture

You cannot release a document containing all eDocuments using Adobe PDF as the primary image format. If you attempt to do so, the following error message will be generated. (SPR 00010020)

```
Release Error: Script #1 (Documentum) [-2147461859 DfException: THREAD: main; MSG:
[DM_API_E_NO_FILE]error: "No file name given for command setfile."
ERRORCODE: 100; NEXT: null; at
com.documentum.fc.client.DfSession.convertToDIException(DfSes..."
```

**Workaround:** From the Image Format tab on the Ascent 7.0 Release Script for Documentum 5.1-5.3 – Release Setup dialog box, choose a different file type for releasing eDocuments. Do not choose "Adobe PDF" as the primary image format.

### Using Release Rendition as Kofax PDF or Adobe PDF

If you select a file format combination of TIFF (multipage or single page) as the primary image format and PDF (Kofax or Adobe) as the secondary image format, and then release only an eDocument, the PDF document will not be added as a rendition. For Kofax PDF, an empty PDF file is released and no error message is generated. For Adobe PDF, a file is *not* released and no error message is generated. (SPR 00010017)

**Workaround:** Release the eDocument with an image.

## Releasing OCR Full Text Renditions

The following sections describe known problems when releasing an OCR full text rendition.

### With Set Full Text Indexing Option Selected

If you attempt to release a primary TIFF image with an OCR full text rendition and you have selected the Set Full Text Indexing option on the Document Options tab, the document's "Full Text Indexed" property is not checked on the Documentum Server. However, the document is fully indexed and searchable in the Documentum repository.

This is a Documentum known issue. (Document Case #296322; Documentum Bug #67741; Kofax SPR 00010029)

### With eDocuments

If you attempt to release only an eDocument with an OCR full text rendition, the OCR full text file will not be added as a rendition to the released document. An empty OCR full text file is released and no error message is generated. (SPR 00010018)

**Workaround:** Release the eDocument with an image.

## Latest Version Option

If the latest version of the released document is not the current version and you select the "Latest version" option on the Document Settings tab, the release script will automatically create a new version of the released document corresponding to the option marked "Current version" in Documentum. (SPR 00009962)

## Dynamically Select Object Type

The "Dynamically select object type at release using the following Ascent Value" check box on the Document Settings tab allows you to dynamically assign an object type to your released documents at release time. Note that if the object type cannot be matched or resolves to a NULL value at release time, the Release Setup dialog box will receive an error message and the document will not be released. The error message is written to the error log. In addition, if you attempt to delete a linked index field, the login prompt will be displayed so you can login and validate the data in the release script. Once logged in, notice that the assigned object types have been unlinked. If you click the Cancel button, the release script will prompt you to save the data. If you click "No," the next time you setup the release script, the "Dynamically select object type at release using the following Ascent Value" check box will not be cleared and the dynamic object types will be unlinked. If you attempt to release, the release will fail with an error message. (SPR 00014585)

**Workaround:** Click the Apply or OK button to allow the Documentum release script to validate the changes.

## Workflows With the Same Name

With Documentum, you can create workflows with identical names. Be aware that problems can develop when a user specifies the wrong workflow at release setup and then releases. This occurs because the Ascent 7.0 Release Script for Documentum uses the workflow name instead of the object's unique identifier. (SPR 00012262)

**Workaround:** Create unique names for each of your Documentum workflows.

## **Unexpected Behavior With the Release Working Directory**

If you do not specify a Release working directory on the General Settings tab, the Ascent 7.0 Release Script for Documentum will give you the option to create the directory at release setup. If you click “Yes,” the Ascent 7.0 Release Script for Documentum will create the directory. However, if you click “No,” the release script will still save the changes. (SPR 00009945)

## **Possible Performance Degradation with Documentum 6.0 Content Server**

Document release, especially the first document of each batch, may take longer to release to Documentum 6.0 Content Server. This is caused by the Documentum 5.3 API which requires the extra time to create and save an object to the 6.0 Content Server.

## Appendix A – Releasing eDocuments

The following sections describe how eDocuments are released 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 released contains eDocuments and the “Store to Virtual Document” option is *not* selected on the Storage Settings tab, the following will occur:

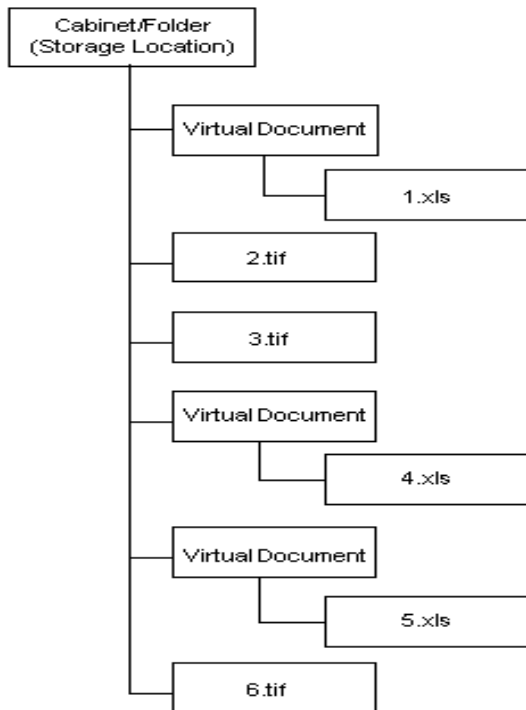
- 1 Each image will be released to a document object. The images will be stored in Documentum using the same image content type (file format). The document object will be given the name of the document (object\_name) as specified on the Document Settings tab.
- 2 A check will be performed to verify the 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 Ascent Capture. In addition, all eDocuments will be released using the format name suggested by Documentum for the file being released.

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 11. Store to a Cabinet / Folder**

## Storing to a Virtual Document

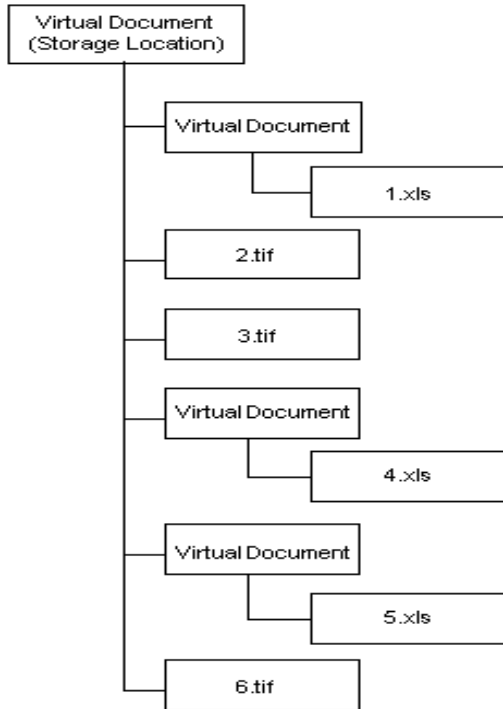
If a document to be released contains eDocuments and the “Store to Virtual Document” option is selected on the Storage Settings tab, the following will occur:

- 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 Ascent Capture. In addition, all eDocuments will be released using the format name suggested by Documentum for the file being released.
- 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 12. Store to a Virtual Document**

## Kofax Technical Support

For additional technical information about Kofax products, visit the Kofax Web site at [www.kofax.com](http://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:

- Ascent Capture software version
- Documentum release script version
- Operating system and Service Pack version
- Network and client configuration
- Copies of your error log files
- Information about your release script