

Kofax Capture

Release Script for FileNet Image Services Release Notes



September 14, 2010

© 1994 - 2010 Kofax, Inc., 15211 Laguna Canyon Road, Irvine, California 92618, U.S.A. All rights reserved. Use is subject to license terms.

Third-party software is copyrighted and licensed from Kofax's suppliers. This product includes software developed by the Apache Software Foundation (<http://www.apache.org/>).

This product is protected by U.S. Patent No. 6,370,277.

THIS SOFTWARE CONTAINS CONFIDENTIAL INFORMATION AND TRADE SECRETS OF KOFAX, INC. USE, DISCLOSURE OR REPRODUCTION IS PROHIBITED WITHOUT THE PRIOR EXPRESS WRITTEN PERMISSION OF KOFAX, INC.

Kofax, the Kofax logo, Ascent Capture, the Ascent Capture logo, and Ascent are trademarks or registered trademarks of Kofax, Inc. in the U.S. and other countries.

FileNet Image Services and IDM Desktop are registered trademarks of FileNet Corporation.

Microsoft and Windows are registered trademarks of Microsoft Corporation.

All other product names and logos are trade and service marks of their respective companies.

U.S. Government Rights Commercial software. Government users are subject to the Kofax, Inc. standard license agreement and applicable provisions of the FAR and its supplements.

You agree that you do not intend to and will not, directly or indirectly, export or transmit the Software or related documentation and technical data to any country to which such export or transmission is restricted by any applicable U.S. regulation or statute, without the prior written consent, if required, of the Bureau of Export Administration of the U.S. Department of Commerce, or such other governmental entity as may have jurisdiction over such export or transmission. You represent and warrant that you are not located in, under the control of, or a national or resident of any such country.

DOCUMENTATION IS PROVIDED "AS IS" AND ALL EXPRESS OR IMPLIED CONDITIONS, REPRESENTATIONS AND WARRANTIES, INCLUDING ANY IMPLIED WARRANTY OF MERCHANTABILITY, FITNESS FOR A PARTICULAR PURPOSE OR NON-INFRINGEMENT, ARE DISCLAIMED, EXCEPT TO THE EXTENT THAT SUCH DISCLAIMERS ARE HELD TO BE LEGALLY INVALID.

Contents

Introduction	1
Additional Documentation	1
System Requirements	1
FileNet Image Services Server Support	1
Client Operating System Support	2
Administration and Release Workstations - Additional Requirements	2
Source Code	2
Features	3
Kofax Capture Values / FileNet Attributes	3
Kofax Capture Value {Document GUID}	3
Release to FileNet Image Services Repository	3
Multiple Release Support	3
Storage Folders	4
Release Script Information Interchange Supported	4
Online Help Available for Release Setup	4
Image Support	4
Kofax PDF Support	4
Adobe Acrobat Capture PDF Support	5
eDocuments Support	5
Additional Information	5
Unsupported Kofax Capture Features	5
SecurityBoost	5
File Name Retention	6
Commitment Of Documents	6
Image Formats Settings	6
Skip First Page	6
{Index Operator's Station ID} Kofax Capture Value	6
Menu Item Data Type Support	6
Sharing Data Among Release Scripts	7
Enable eDocument Processing	7
OCR Full Text is Not Supported	8
Kofax PDF Options	8
Adobe Acrobat Capture Options	8
Operating System Requirements for Kofax Capture	9
Adobe Acrobat Capture and the Kofax Capture Release Workstation Installations	9
Releasing Adobe PDF Documents	9
Workflow Steps	9

Multipage TIFFs	10
Releasing From Multiple Kofax Capture Standalone Workstations	10
Re-releasing Documents in Error	10
Invalid Watched Folders	10
Installing the Release Script	10
Important Note About Installation	10
Installation Instructions	10
Upgrading the Release Script	11
Important Note About Upgrade	11
Upgrading From Version 5.0 of the FileNet Image Services Release Script	11
Upgrade Instructions	12
Application Maintenance	13
Repairing the Release Script	13
Removing the Release Script	13
Logging On to the Release Script	14
Setting Up the Release Script	14
Release Login Settings Tab	15
Storage Settings Tab	15
Document Properties Tab	15
Image Format Tab	15
General Settings Tab	15
Publishing a Batch Class	15
Releasing Batches	16
Known Problems	16
Problems When Installing on Windows XP	16
Problems When Uninstalling the Release Script	17
SMALLINT Data Type Limitation	17
Document Attribute Field Length Limitation	17
Upper ASCII Character Limitations When Creating Folders	17
Running Multiple Release Instances Requires FileNet Image Services Setting	18
Login Method Affects Login and Release Behavior	18
Kofax Technical Support	19

Introduction

This document contains the release notes for the Kofax Capture Release Script for FileNet Image Services, which supports FileNet Image Services 3.6 and FileNet Image Services 4.x. This release script copies document images, PDF documents, and eDocuments to permanent storage and writes index data to the FileNet Image Services repository.

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

Additional Documentation

These release notes are a supplement to the following:

- *Kofax Capture Developers Guide*
- Kofax Capture Release Notes
- *Kofax Capture Getting Started Guide*
- *Kofax Capture Installation Guide*
- Kofax Capture Help
- Kofax Capture Release Script for FileNet Image Services Help

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

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

The Kofax Capture Release Script for FileNet Image Services requires the following components to be installed prior to installing this release script.

FileNet Image Services Server Support

The Kofax Capture Release Script for FileNet Image Services requires the following network server components:

- FileNet Image Services 3.6 supports the following:
 - FileNet Image Services 3.6 with Service Pack 2
- FileNet Image Services 4.0 supports the following:
 - FileNet Image Services 4.0 with Hot Fix Pack 2
- FileNet Image Services supported database
- FileNet Image Services 4.1.1
- FileNet Image Services 4.1.2

The release script was tested using FileNet Image Services 4.1.1 on Windows 2003 Server with Service Pack 1 and Microsoft SQL Server 2000 Enterprise edition with Service Pack 4.

It was also tested using FileNet Image Services 4.1.2 on Windows 2003 Server with Service Pack 2 and Microsoft SQL Server 2005 Enterprise edition with Service Pack 3.

Client Operating System Support

The Kofax Capture Release Script for FileNet Image Services supports the following client operating systems:

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

Note At the time of publishing these release notes, the Kofax Capture Release Script for FileNet Image Services was certified with the Service Packs listed above.

Administration and Release Workstations – Additional Requirements

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

- Ascent Capture 7.0, Ascent Capture 7.5, Kofax Capture 8, Kofax Capture 8 Service Pack 5, or Kofax Capture 9
- FileNet Image Services 3.6 must have the following components:
 - FileNet IDM Desktop 3.2a with Patch 14
- FileNet Image Services 4.0 must have **one** of the following components:
 - FileNet IDM Desktop 3.3
 - FileNet IDM 4.0
- FileNet Image Services 4.1.1 or 4.1.2 must have the following components:
 - FileNet IDM Desktop 4.0.2.002

Note At the time of publishing these release notes, the Kofax Capture Release Script for FileNet Image Services was certified with the FileNet IDM Desktop Patch listed above.

Source Code

The source code for the Kofax Capture Release Script for FileNet Image Services is provided and it is located on your Kofax Capture Release Script for FileNet Image Services 3.6-4.0 installation CD in the FileNet\IS3-4 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 FileNet Image Services release script. Refer to *Installing the Release Script* on page 10 for the installation instructions. When you install the FileNet Image Services release script, you will install the required components referenced in the source code.

- 2 Open, make any desired modifications, and compile the FileNet Image Services source code in Visual Basic.
- 3 Copy the newly created ISRel3-4_v7.dll to the installation directory. 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 FileNet Image Services release script. You may want to make a copy of the file for backup purposes, and store the copy in a safe location.

Note In order to successfully modify and compile the release script, development must occur on a workstation with the appropriate versions of Kofax Capture, CAPTools, and the FileNet Image Services release script previously installed. To use the modified release script, you must replace the FileNet Image Services release script ISRel3-4_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.

Refer to the documentation that came with your FileNet Image Services product and Visual Basic documentation for assistance.

Features

This section contains information about features provided with the Kofax Capture Release Script for FileNet Image Services.

Kofax Capture Values / FileNet Attributes

The Kofax Capture Release Script for FileNet Image Services provides an easy-to-use interface for linking Kofax Capture Values to FileNet document attributes and folder attributes. Examples of Kofax Capture Values include Document index fields, Folder index fields, Batch fields, and Text Constants. The names of "required" FileNet attributes within a document class or folder class are marked with an asterisk (*), giving you a visual indicator that certain fields must be linked.

Kofax Capture Value {Document GUID}

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

Release to FileNet Image Services Repository

The Kofax Capture Release Script for FileNet Image Services stores images, eDocuments, PDF documents, and document/index data from Kofax Capture into your FileNet Image Services repository.

Multiple Release Support

The Kofax Capture multiple release feature allows you to assign multiple release scripts to a document class, and this release script can be used in conjunction with that feature.

You can also provide a unique name for your release script. This name is used to refer to your script in the Release Scripts window. The field is not required, but may help you keep track of your scripts when using the Kofax Capture multiple release feature.

Refer to your Kofax Capture Help for more information about the multiple release feature (Ascent Capture Help keyword: *Multiple release > about*).

Storage Folders

The Kofax Capture Release Script for FileNet Image Services allows you to use Kofax Capture Values to specify a FileNet Image Services release folder for your document image storage.

Release Script Information Interchange Supported

The Kofax Capture Release Script for FileNet Image Services supports the Kofax Capture Release Script Information Interchange feature. This feature allows the release script to pass information to other release scripts.

Refer to *Sharing Data Among Release Scripts* on page 7 for more information.

Online Help Available for Release Setup

The Kofax Capture Release Script for FileNet Image Services 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 Kofax Capture Release Script for FileNet Image Services 3.6-4.0 – Release Setup window to display help information about release options.

Image Support

This release script 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 with JPEG Compression
- PCX – PackBytes Compression
- JPG – JPEG Compression
- Kofax PDF
- Adobe PDF from TIFF
- Adobe PDF from JPEG
- Adobe PDF from PCX

Kofax PDF Support

With the Kofax Capture Release Script for FileNet Image Services, you can release Kofax PDF documents into your FileNet Image Services 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:

- PDF Image Only
- PDF Image + Text

Refer to *Kofax PDF Options* on page 8 for more information about Kofax PDF documents.

Adobe Acrobat Capture PDF Support

The Kofax Capture Release Script for FileNet Image Services supports releasing Adobe Acrobat Capture PDF documents into your FileNet Image Services repository. The software is provided by Adobe Acrobat Capture and is not included with the Kofax Capture product. To release Adobe PDF documents, you must install the Adobe® Acrobat Capture® 3.0 Clustered or Personal Edition software.

Refer to *Adobe Acrobat Capture Options* on page 8 for more information about Adobe Acrobat Capture PDF documents.

eDocuments Support

With the Kofax Capture Release Script for FileNet Image Services, you do not need to limit your batches to image files. eDocuments are supported for release into FileNet Image Services repository. All the documents you want in a batch can be processed together regardless of file type.

Refer to *Enable eDocument Processing* on page 7 for more information about eDocument files.

Additional Information

This section contains additional information about the Kofax Capture Release Script for FileNet Image Services.

Unsupported Kofax Capture Features

Kofax Capture Release Script for FileNet Image Services does not support the following Kofax Capture features.

SecurityBoost

This release script does not support the Kofax Capture SecurityBoost feature. The SecurityBoost feature allows you to enhance Kofax Capture security for systems using Microsoft Windows XP and Windows 2000. If security is an issue, run the release script on a protected computer. (SPR 00009898)

If the SecurityBoost feature is enabled for Kofax Capture on your Microsoft Windows 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\Kofax Capture\Bin\release.exe"/NoBoost`).

3 Click OK.

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

File Name Retention

This release script 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.

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 FileNet document attributes that support Kofax Capture Values. Notice that the document attribute 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.

Commitment Of Documents

Documents are committed directly to FileNet Image Services. Each eDocument in the batch is exported to FileNet Image Services as a new document object. All images and/or PDF documents in a batch will be exported to FileNet Image Services as one new document object.

Image Formats Settings

The FileNet Image Services document properties page count will be inaccurate if you select a multipage image format setting. This is because FileNet Image Services does not recognize multipage image formats.

Skip First Page

The “Skip first page of each document” option as specified on the General Settings tab, allows you to discard the first page of each document from the image. However, if you are releasing only one image in a document and you select this option, release will fail and the document will be routed to the Kofax Capture Quality Control module.

{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.

Menu Item Data Type Support

The Kofax Capture Release Script for FileNet Image Services supports the use of menu item data types. This means you can link Kofax Capture Values to a menu item document property in release setup. Menu items and their corresponding descriptions must be predefined in FileNet Image Services by the system administrator.

During Validation, operators can enter a menu item number or letter (also known as a FileNet key), a description, or an ASCII value that represents the key for properties linked to the menu item field. The release script will automatically identify whether the data entered during

validation is a key, description, or ASCII value and compare it to the list of FileNet Image Services menu choices. Note that the validation operator must know what choices are available, as the Kofax Capture Validation module does not provide a drop-down list of menu choices.

If the menu item field is not required and the entered value cannot be found in FileNet Image Services, the released value will be NULL. If the menu item field is required but the entered value cannot be found, the batch will be routed to the Kofax Capture Quality Control module.

Sharing Data Among Release Scripts

The Kofax 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 Kofax 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 window. For example:

```
FileNet Image Services 3.6-4.0
Kofax Capture Text
```

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

Refer to your Kofax Capture Help for more information about configuring the RepositoryDocumentID. You can display Kofax Capture Help from the Help menu available from any Kofax Capture module.

Enable eDocument Processing

To release eDocument files, you must enable Kofax Capture eDocument processing in your applicable batch class property.

For details about how eDocument files, image files, and non-image files are released to the FileNet Image Services repository, refer to the Help available with the Kofax Capture Release Script for FileNet Image Services (Help keyword: *File format combinations*).

► To enable eDocument processing

- 1 From the Create Batch Class window or Batch Class Properties window, select the Advanced tab.
- 2 Check the "Allow import of eDocument files" to enable eDocument processing.
- 3 Click Apply to save your settings without closing the window. Click OK to save your settings and close the window.

Note If you do not enable eDocument processing in Kofax Capture, the eDocument files are simply ignored at release time.

For more information about eDocument processing, refer to the Kofax Capture Help (Ascent Capture Help keyword: *eDocuments > understanding*).

OCR Full Text is Not Supported

The Kofax Capture Release Script for FileNet Image Services does not export OCR Full Text files. This is because FileNet Image Services was designed for images only. OCR Full Text files are simply ignored at release time.

Kofax PDF Options

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

For details about how Kofax PDF documents and non-image files are released to the FileNet Image Services repository, refer to the Help available with the Kofax Capture Release Script for FileNet Image Services (Help keyword: *File format combinations*).

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

- 1 From the Create Batch Class window or Batch Class Properties window, 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 window. Click OK to save your settings and close the window.

► To enable Kofax PDF generation for a document class

- 1 From the Create Document Class window or Document Class Properties window, 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 window. Click OK to save your settings and close the window.

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

Adobe Acrobat Capture Options

The Kofax Capture Release Script for FileNet Image Services 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.

For details about how Adobe PDF documents and non-image files are released to the FileNet Image Services repository, refer to Help available with the Kofax Capture Release Script for FileNet Image Services (Help keyword: *File format combinations*).

Operating System Requirements for Kofax Capture

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

Adobe Acrobat Capture and the Kofax Capture Release Workstation Installations

During the conversion process, communication must occur between Adobe Acrobat Capture and the Kofax Capture Release 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.

Releasing Adobe PDF Documents

To release in Adobe PDF format, you must install the appropriate Adobe Acrobat Capture software. In addition, the release working directory must be available to the Kofax Capture workstation where you are setting up the release script and the Adobe Acrobat Capture workstation. One way to do this is to specify a UNC path for the Release directory. This can also be done with a mapped drive, the drive letter and path must be the same on all workstations. If you specify a local Release working directory, please note the following:

- A folder with that name will be created on the Kofax Capture workstation, but it will not be used.
- The same path must already exist on the Adobe Acrobat Capture workstation.
- Adobe PDF images will be placed in the folder on the Adobe Acrobat Capture workstation.

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 needs to contain at least four steps, in the following 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 needs to be called "PDF Image Only" and contain at least three steps, in the following 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 Release 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 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 Kofax 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 Kofax Capture PDF Release window displayed at the Release workstation. The Cancel button will automatically cancel the Adobe Acrobat Capture documents.

Installing the Release Script

You can install the Kofax Capture Release Script for FileNet Image Services on an Kofax Capture client workstation or standalone workstation.

Important Note About Installation

To install the Kofax Capture Release Script for FileNet Image Services 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 Kofax Capture Release Script for FileNet Image Services, refer to *System Requirements* on page 1 for information about installation requirements.

Installation Instructions

Use the following instructions to install the Kofax Capture Release Script for FileNet Image Services.

► **To install the release script**

- 1 Insert your Kofax Capture Release Script FileNet Image Services 3.6-4.0 installation CD into your CD drive.
- 2 From your Windows task bar, select Start | Run, browse to the FileNet\IS3-4 folder on the CD, and run Setup.exe. The installation program will start.
- 3 Follow the instructions on the screen to install the release script.
- 4 When the installation is complete, a message will display that indicates the release script was successfully installed.

Note Installing the release script automatically registers it with Kofax Capture.

- 5 Repeat this procedure on all Administration and Release workstations that will use the FileNet Image Services release script.

Upgrading the Release Script

If you are currently using version 6.0 or 6.1 of the FileNet Image Services release script, you can upgrade to the Kofax Capture Release Script for FileNet Image Services, if desired. All release setup settings will be retained.

Important Note About Upgrade

To upgrade to the Kofax Capture Release Script for FileNet Image Services 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 Kofax Capture Release Script for FileNet Image Services, refer to *System Requirements* on page 1 for information about installation requirements.

Upgrading From Version 5.0 of the FileNet Image Services Release Script

We recommend that you upgrade to version 6.0 of the FileNet Image Services release script first. Then, upgrade to Kofax Capture Release Script for FileNet Image Services.

Alternatively, you can uninstall version 5.0 of the FileNet Image Services release script. In some cases, you may need to take notes on the release setup settings before you install Kofax Capture Release Script for FileNet Image Services. An easy way to do this is to capture and save the screen shots of the release setup settings. Use the following instructions to replace version 5.0 of the FileNet Image Services release script.

► **To replace version 5.0 of the FileNet Image Services release script**

- 1 Release any existing batches associated with the release script. Refer to *Releasing Batches* on page 16 for more information.
- 2 Follow these steps to take notes on the release setup settings on version 5.0 of the FileNet Image Services release script:
 - a 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. (You may need to expand the batch class item to select associated document classes.) A context menu will display.

- b** From the context menu, select “Release Scripts.” The Release Scripts window will display.
 - c** From the Release Scripts window, select the FileNet Image Services release script from the left-hand side of the screen and click Setup. The Release Setup window will display.
 - d** Capture screen shots of each tab and save them so that you can easily re-create the settings later. You can press ALT+PRINT SCREEN or use any screen capture software.
 - e** Click Cancel to close the Release Setup window, and then click Close to close the Release Scripts window.
- 3** Uninstall version 5.0 of the FileNet Image Services release script.
 - 4** Install Kofax Capture Release Script for FileNet Image Services. Refer to *Installing the Release Script* on page 10 for the instructions.

Upgrade Instructions

Use the following instructions to upgrade to the Kofax Capture Release Script for FileNet Image Services.

► To upgrade the release script

- 1** Release any existing batches associated with the release script. Refer to *Releasing Batches* on page 16 for more information.
- 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 window will display.
- 4** From the Release Scripts window, ensure that the previous version of the FileNet Image Services release script is selected from the list of Assigned Release Scripts (on the right-hand side of the screen). Then, select the “FileNet Image Services 3.6-4.0” release script from 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 FileNet Image Services release script and verify that all of 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 15 for instructions.

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

Application Maintenance

This section describes how to repair and remove the Kofax Capture Release Script for FileNet Image Services.

Repairing the Release Script

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

► To repair the release script

- 1 Insert your Kofax Capture Release Scripts for FileNet Image Services 3.6-4.0 installation CD into your CD drive.
- 2 From your Windows task bar, select Start | Run, browse to the FileNet\IS3-4 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 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 Kofax Capture Release Script for FileNet Image Services 3.6-4.0 installation CD into your CD drive.
- 2 From your Windows task bar, select Start | Run, browse to the FileNet\IS3-4 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 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 the Kofax Capture Release Script for FileNet Image Services.

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 17 for information about a known problem.

Note After uninstalling, the Kofax Capture Release Script for FileNet Image Services 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, and remove every instance of the FileNet Image Services release script. After all references to the release script are removed, you will be able to delete the FileNet Image Services 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 Kofax Capture, you may specify the release script to use when releasing your images, PDF documents, eDocuments, and index data.

► **To log on to the release script**

- 1 Start the Kofax 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 document class. (Expand the batch class item to select the desired document class.) A context menu will display.
- 3 From the context menu, select "Release Scripts." The Release Scripts window will display.
- 4 The Release Scripts window lists all available release scripts. Available release scripts are those that are registered with Kofax Capture. From the Release Scripts window, select the "FileNet Image Services 3.6-4.0" release script and click Add.
- 5 If you are not already logged on to FileNet Image Services, the Kofax Capture FileNet Login window will display.

Note If you are already logged on to FileNet Image Services, a message will display asking if you want to use the existing library. To continue, click OK. To manually log off the library and re-run setup, click Cancel.

- 6 Enter your FileNet Image Services user name, password, and desired library. The library is your release domain.

Note The FileNet Image Services user name and password are case-sensitive.

- 7 Click OK. The Kofax Capture Release Script for FileNet Image Services 3.6-4.0 – Release Setup window will display.
- 8 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 Kofax Capture Release Script for FileNet Image Services.

Note For more details about the setup options, refer to the Help available from the Kofax Capture Release Script for FileNet Image Services 3.6-4.0 – Release Setup window.

Release Login Settings Tab

This tab allows you to specify the FileNet Image Services login settings for release.

Storage Settings Tab

This tab allows you to create a FileNet Image Services folder for your released documents. If the “Release to folder” check box is not enabled, the documents will be released to the root level of the library specified during logon.

Document Properties Tab

This tab allows you to assign a FileNet document class that released images will use, and link Kofax Capture Values to FileNet document class attributes.

Image Format Tab

This tab allows you to select the desired image format for releasing your images. 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 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 with your documents.

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 Kofax 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 window will display.
- 4 From the Publish window, select your batch class and click Publish. Kofax Capture will check all 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 the 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 Kofax 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 Kofax Capture Help for more information about batch classes (Ascent Capture Help keyword: *Batch classes > about*).

Releasing Batches

With the Kofax Capture Release Script for FileNet Image Services, the Kofax 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 Kofax 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 Kofax Capture and/or the network system. All batches queued for release will be released after initiation of the Release module.

Note Refer to your Kofax Capture Help for more information about configuring the Release module (Ascent Capture Help keyword: *Release module > about*). You can display Kofax Capture Help from the Help menu available from any Kofax Capture module.

► To release a batch

- 1 Start the Kofax 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 Kofax Capture. If any documents or pages are rejected, the batch will be routed to the Kofax 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 Kofax Capture Release Script for FileNet Image Services.

Problems When Installing on Windows XP

If you are installing the Kofax Capture Release Script for FileNet Image Services on a Windows XP Professional workstation 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 this problem occurs, run Repair.

Refer to *Repairing the Release Script* on page 13 for more information. Alternatively, you can re-register the release script in the Release Script Manager.

SMALLINT Data Type Limitation

The Kofax Capture SMALLINT data type cannot be linked to a FileNet Image Services numeric data type. If an Kofax Capture SMALLINT data type is linked to the FileNet Image Services numeric field on the Document Settings tab, release setup will prompt the user with the following error message. (SPR 25866)

Error Description: The following field types do not match:
 Numeric-Double
 SmallInt_5-Small Integer

Document Attribute Field Length Limitation

Release will fail without any errors if more than 164-characters are used for any document attribute field. This is a limitation of the FileNet Image Services API. (FileNet Incident 10096459; Kofax SPR 25869)

Upper ASCII Character Limitations When Creating Folders

Due to a limitation with FileNet Image Services, you cannot create a folder when the following upper ASCII character appears after any other character. (SPR 00009846)

- € (ASCII 128)
- μ (ASCII 181)
- ß (ASCII 223)
- Ÿ (ASCII 159)
- ÿ (ASCII 255)

For example, if you attempt to create a folder with the name Louÿs, release will fail with the following error message.

The User Sys Admin does not have permission to file documents into the FileNet folder Louÿs. The folder / Louÿs is a new folder that has not been saved. You must save the folder before performing this operation.

You can successfully create a folder using the following conditions:

- The upper ASCII character is the only character in the string.
- The upper ASCII character is the first character in the string.

Note There are no restrictions when using upper ASCII characters for document attributes.

Running Multiple Release Instances Requires FileNet Image Services Setting

Because you can run multiple instances of the Kofax Capture Release Script for FileNet Image Services 4.0 release script, it requires concurrent logins to FileNet Image Services.

► To increase the number of concurrent logins allowed by FileNet Image Services

- 1 Open the FileNet Security Administration utility.
- 2 Select System | Default Security Settings. This displays the “Update Default Security Settings” window.
- 3 In the “Maximum concurrent logons per user [1-10000]:” field, increase the value from one to as many release instances as are running. For example, if you are concurrently running three instances of release on each of five systems, enter 15.

Login Method Affects Login and Release Behavior

The release script now logs in to FileNet Image Services using the server login. This new login method impacts the following areas:

- The FileNet IDM Desktop client cannot be run on the same workstation as the Kofax Capture Release Script for FileNet Image Services 4.0 release script.
- Blank passwords are not supported.
- If login fails during release, all documents in the batch fail with the message: “Login to FileNet failed!”

Please be sure that the proper login credentials have been saved in release setup.

Kofax Technical Support

Support for your Kofax product is provided by your primary application support provider, which is specified as part of the maintenance agreement associated with your purchase. Please contact your Kofax application support provider for technical assistance.

For more information about your product, visit the Kofax Support pages at www.kofax.com for:

- Product information and release news
- Access to the Kofax Knowledgebase
- Access to the online Case Management System (for eligible customers)

Downloadable product documentation

Before contacting your Kofax application support provider, please gather the following information where applicable:

- Kofax Capture software version
- FileNet Image Services release script version
- Operating system and Service Pack version
- Network and client configuration
- Copies of your error log files
- Information about your release script

