

Kofax Capture

Ascent® 7.0 Release Script for
Oracle Content Services 10g
Release Notes



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Introduction

This document contains the release notes for the Ascent 7.0 Release Script for Oracle Content Services 10g. The Ascent 7.0 Release Script for Oracle Content Services 10g allows Ascent Capture to release documents, images, eDocuments, OCR, PDF, and data into Oracle Content Services.

Please read these release 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*
- Help provided from any of the Ascent Capture modules
- Help provided with the Ascent 7.0 Release Script for Oracle Content Services 10g

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

System Requirements

The Ascent 7.0 Release Script for Oracle Content Services 10g requires the following components to be installed prior to installing this release script.

Ascent Capture Requirements

- Ascent Capture 7.0, Ascent Capture 7.5, Kofax Capture 8, or Kofax Capture 9 Server (client/server, all applications enabled)
- Ascent Capture 7.0, Ascent Capture 7.5, Kofax Capture 8, or Kofax Capture 9 Client
- Ascent Capture 7.0, Ascent Capture 7.5, Kofax Capture 8, or Kofax Capture 9 Standalone

Release Workstation System Requirements

The Ascent 7.0 Release Script for Oracle Content Services 10g supports all the operating systems supported by Ascent Capture 7.x, Kofax Capture 8, and Kofax Capture 9. For a list of supported operating systems, see the Kofax Capture Installation Guide.

Oracle Content Services Requirements

The Ascent 7.0 Release Script for Oracle Content Services 10g requires Oracle Collaboration Suite Content Services 10g, version 10.1.2 or later.

Note This release script was tested using Oracle Content Services 10.1.2.2.1 running under Redhat Enterprise Linux 4.

Minimum Hardware Requirements

Hardware requirements identified for Oracle Content Services are primarily based on performing collaboration tasks and storing electronic documents. In comparison, using Oracle Content Services for imaging involves much higher rates of incoming transactions, and larger file sizes.

Therefore, when using Oracle Content Services for imaging with Ascent Capture, the recommended minimum hardware requirements are higher. Specifically, the minimum hardware requirements for the Oracle Content Services 10g server are as follows:

- Two (2) Pentium 4 class processors in a dual processor configuration
- 3.6 Gbytes RAM

Increasing the number or instances of Ascent Release Servers may not increase overall transaction rates unless additional CPU and memory resources are added to the Oracle Content Services server. Using less than the recommended minimum requirements may result in performance issues that actually reduce overall transaction rates.

Additional consideration should be given to the ability of the system to interact with users of Oracle Content Services while Ascent Capture is concurrently releasing large number of new documents. In such a scenario, consider using the Ascent Capture "timed release" feature so documents are released at a time when the Oracle Content Services system is not heavily needed by interactive users. Additional CPU and memory may be required if increased interaction ability is needed.

Kofax strongly encourages you to consult with your Oracle account manager and/or the Oracle Collaboration Suite Installation Guideline to determine the appropriate configuration for your needs.

Permissions

To ensure successful setup and release, the following permissions must be active in Oracle Content Services:

- To log in to Oracle Content Services using the release script, the user must have, at a minimum, a valid login for Oracle Content Services.
- To access a Release Root Location in release setup, the user must have, at a minimum, Reader access to the Release Root Location.
- To release a document or create a folder, the user must have, at a minimum, Author access to the Release Root Location and to any subfolders created/selected by the release process.

Note In Oracle Content Services, some group permissions may not be overridden at lower levels of the containment hierarchy.

Source Code

The source code for both the Ascent 7.0 Release Script for Oracle Content Services 10g and the connector is provided on the Ascent 7.0 Release Script for Oracle Content Services 10g installation CD. This section provides instructions for modification of the source code and deployment of the new assemblies.

The Release Script

The project file that builds the main assembly OCSRel10_v7.dll for the main assembly is \Oracle\CS10\Source\ReleaseScript\OCSRel10_v7.vbp. After modifying and building in Visual Basic, copy the main assembly OCSRel10_v7.dll to the OCSRel10_v7 installation folder (for example, C:\Program Files\Ascent\Cap\OCSRel10_v7).

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 Oracle Content Services release script previously installed.

Refer to the documentation that came with your Oracle Content Services product and Visual Studio documentation for assistance.

The Connector

The connector for this release script has two parts: a .Net assembly which uses the Oracle Web services API to communicate with the Oracle Content Services server, and a COM wrapper assembly which is used to expose functionality to COM applications such as the release script.

- The .NET assembly project file that builds Kofax.OCSRel10_v7.dll is
 \Oracle\CS10\Source\Connector\Assembly\OCSRel10_v7\OCSRel10_v7.csproj
- The COM wrapper assembly project file that builds Kofax.OCSRel10_v7COM.dll is
 Oracle\CS10\Source\Connector\COM\OCSRel10_v7COM\OCSRel10_v7COM.csproj.

The COM assembly must be registered with the Microsoft utility regasm.exe using the /codebase option in order for COM applications to use it. The main assembly must be in the same folder as the COM assembly.

If you build the connector in Visual Studio on a computer where the release script is installed, Visual Studio will automatically register the COM assembly you build and unregister the one that was installed by the release script installation program. To deploy the new assemblies on non-development computers where the release script is installed you must follow the instructions below.

► To deploy new connector assemblies

- 1 Copy both connector assemblies (Kofax.OCSRel10_v7.dll and Kofax.OCSRel10_v7COM.dll) to the <release script installation folder path>\NetAsm subfolder.
- 2 Register the COM assembly with regasm.exe using the /codebase option. Run regasm.exe when you deploy the new version of the assemblies to computers where no development has been done, if you have changed the version of the COM assembly, or if you have modified any part of the COM interface.

Features

This section contains information about features provided with the Ascent 7.0 Release Script for Oracle Content Services 10g.

The Ascent 7.0 Release Script for Oracle Content Services 10g provides an easy-to-use setup dialog box available from the Ascent Capture Administration module. The dialog box allows you to specify release settings at batch class setup time that control how documents and data are released into Oracle Content Services.

Online Help Available for Release Setup

The Ascent 7.0 Release Script for Oracle Content Services 10g 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 Help from any tab in the Ascent 7.0 Release Script for Oracle Content Services 10g Release Setup dialog box to display information about release options.

Ascent Values / Oracle Content Services Attributes and Parameters

The Ascent 7.0 Release Script for Oracle Content Services 10g provides an easy-to-use interface for linking Ascent Capture Values to Oracle Content Services attributes and parameters. Examples of Ascent Values include Document index fields, Folder index fields, Batch fields, Ascent Capture Values, and Text Constants. In the release setup interface, the names of required Oracle Content Services attributes and parameters are marked with an asterisk (*), giving you a visual indicator that certain fields must be linked.

Folder Creation

When releasing to user-defined folders, the release script searches the Oracle Content Services library to locate a folder based on the Folder Name attribute and the location of the Oracle Content Services release root location.

If the folder is found, it will be used for release. The existing attributes of the folder will not change, even if Ascent Values are linked to the attributes for the folder.

If the folder is not found, a new folder is created in Oracle Content Services using the values specified at release setup.

Folder Names

You can use the Folder Name attribute to specify a name for a new release root location subfolder. This attribute will always appear first in the Folder Settings tab if you choose to add a new folder. This is a required attribute. Required folder attributes are shown with an asterisk in front of their names (for example, *Folder Name). You must provide an Ascent Value for all required attributes.

If the Folder Name attribute resolves to a NULL value, the document will be rejected and routed to the Ascent Capture Quality Control module.

Invalid Folder Name Characters

The Folder Name cannot end with a period and cannot contain the following characters:

- Asterisk (*)
- Backslash (\)
- Colon (:)
- Greater than sign (>)
- Less than sign (<)
- Pipe (|)
- Question mark (?)
- Quotation marks (“ ”)
- Slash mark (/)

Release Script Information Interchange Supported

The Ascent 7.0 Release Script for Oracle Content Services 10g supports the Ascent Capture Release Script Information Interchange feature. This feature allows the release scripts to pass information to other release scripts.

Refer to *Sharing Data Among Release Scripts* on page 9 for more information.

eDocument Original File Name Retention Supported

The Ascent 7.0 Release Script for Oracle Content Services 10g supports Ascent Capture original file name retention for eDocuments. To retain original filenames of eDocuments:

- The SupportsOriginalFileName property must be set to True (SupportsOriginalFileName=True) in the release script OCSRel10_v7.inf file, which is located in the folder where you installed the release script (for example, C:\Program Files\Ascent\Cap\OCSRel10_v7.inf). True is the default setting, and the SupportsOriginalFileName property is not case-sensitive.
- The “Use the original file name of image and eDocument files” option on the Release Properties dialog box in the Ascent Capture Release module queue properties must be selected.

When the above options are set correctly, documents released as eDocument files will retain their original file name when released. If the document is released with the SupportsOriginalFileName property set to FALSE, file names for eDocuments are based on the Document Name attribute linked in release setup.

Note OCR full text files, imported TIFF files, and Kofax PDF documents released from Ascent Capture always use the Ascent Value linked to the Document Name, regardless of the configuration.

SecurityBoost Supported

The Ascent 7.0 Release Script for Oracle Content Services 10g supports the Ascent Capture SecurityBoost feature. The SecurityBoost feature allows you to enhance Ascent Capture security for systems using Windows XP and Windows 2000.

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

Duplicate Documents

The Ascent 7.0 Release Script for Oracle Content Services 10g handles duplicate documents – documents that already exist in the release root location with the same name as the new document – based on the versioning policy for the Oracle Content Services location where the document is released. Table 1 shows the release results for the versioning choices.

Table 1. Content Services Versioning and Duplicate File Names

Versioning	Checked out or Locked	Release result when duplicate file name is found
None	N/A	Release Fails
Manual or Automatic	Yes	Release Fails
Manual or Automatic	No	Release succeeds: the document is checked out, and then a new version of the document is checked in.

Release Working Directory

The Ascent 7.0 Release Script for Oracle Content Services 10g requires a temporary local or network working directory to store copies of document images at release time. The images reside in this directory temporarily as they are transferred from Ascent Capture to the designated release location.

If the working directory you specify during release script setup does not exist, you will be given the option of creating the specified directory or selecting a different directory. On the other hand, if the directory does not exist at release time, it will automatically be created.

Note The release script clears all content related to release of a batch after its release has been completed.

Batch Release Order

The Ascent 7.0 Release Script for Oracle Content Services 10g supports batch release order: by document order or by assigned Release Script.

Multiple Release Supported

The Ascent 7.0 Release Script for Oracle Content Services 10g supports the Ascent Capture Multiple Release feature. This feature allows you to assign multiple release scripts to a document class.

In addition, this release script allows you to append a unique name to the script at release setup time. The name is appended to the release script name and displays in the Assigned Release Scripts list in the Release Setup dialog box. This field is not required, but may help you to keep track of your release scripts when using the Multiple Release feature.

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

Ascent Folder Fields Supported

The Ascent 7.0 Release Script for Oracle Content Services 10g supports Ascent folder fields, including displaying them as a separate group on the links menu and responding to add and delete events.

- Many eDocument formats, such as Microsoft Word, Excel and Powerpoint

Multiple Instance Support

A feature in Ascent Capture 7.5 is multiple instance support, which allows multiple instances of release scripts of the same type to be running on the same computer in parallel.

To ensure that release scripts run properly in this environment, the temporary working directories are allocated by adding a subfolder based on the working folder name so that each instance of a script will not interfere with other instances of the same script.

Content Based Retrieval

If the Oracle Enterprise administrator has configured Oracle Content Services for content based retrieval, then any document type supported for content indexing by Oracle Open Text can have its content searched.

The following types of files can be searched for based on the content, after the file(s) are released and an Oracle text index synchronization has occurred:

- PDF Image + Text Files
 - Text And Image
 - Text Over Image
 - Text Under Image
- OCR Files

Image Support

This release script supports the following file and compression formats:

- Kofax PDF
- Multipage TIFF - G4
- Multipage TIFF - G3
- Multipage TIFF - G3/2D
- Multipage TIFF - JPEG Compression
- Multipage TIFF - Uncompressed

Kofax PDF Support

With the Ascent 7.0 Release Script for Oracle Content Services 10g, you can release Kofax PDF documents. 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:

- PDF Image Only
- PDF Image + Text

Refer to *Kofax PDF Options* on page 10 for more information about Kofax PDF documents.

OCR Full Text Support

With the Ascent 7.0 Release Script for Oracle Content Services 10g, you can release documents processed through the Ascent Capture OCR Full Text module into the Oracle Content Services release root location.

Refer to *OCR Full Text Options* on page 11 for more information about OCR full text files.

eDocument Support

With the Ascent 7.0 Release Script for Oracle Content Services 10g, you do not need to limit your batches to image files. eDocuments are supported for release into Oracle Content Services.

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

Additional Information

This section contains additional information about the Ascent 7.0 Release Script for Oracle Content Services 10g.

Refreshing Oracle Content Services Information in the Release Script

All Oracle Content Services information is refreshed in release setup when you log into the release script. This includes the available release root locations, document categories, and folder attributes. In addition, a refresh occurs whenever you select a new release root location. However, if folders, categories, attributes, or parameters are changed in Oracle Content Services while release setup is open, you must log out of the release script and log back in to see the latest information.

Skip First Page

The “Skip first page of each document” option specified on the General Settings tab allows you to discard the first page of each document from the image. You may want to do this if you are using standalone separator sheets to separate your documents. 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 Ascent Capture Quality Control module.

Document and Folder Attribute Inheritance

Documents released inherit the attributes of the folder into which they are released. Also, new folders created by the release script inherit the properties of their parent folder (unless the folder

already exists in Oracle Content Services, in which case the existing folder's attributes are used). During release setup, you can select an existing Oracle Content Services library or folder by name within the Oracle Content Services containment hierarchy as the Release Root Location.

Settings and availability of the following items is based on the selected release root location library or folder:

- Security
- Sharing
- Versioning
- Record categories
- Workflow parameters
- Records management policies

The Release Root Location is used to determine which Oracle Content Services attributes and parameters are available for linking with Ascent Values.

Multi-Value Fields

Fields that contain multiple values are released as a concatenated string.

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:

```
Ascent 7.0 Oracle Content Services 10g
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 Help for more information about configuring the RepositoryDocumentID. You can display Ascent Capture Help from the Help menu available from any Ascent Capture module. Alternatively, you can select Start | Programs | Ascent Capture | Ascent Capture Help.

Multiple Document Naming

When multiple documents are spawned by the same document in Ascent Capture, the release script will name them in such a way that an association between them is clear when viewing them in Oracle Content Services--except for eDocuments when the option to retain the original filename

is used (see the topic *eDocument Original File Name Retention Supported* on page 5 for more information).

Note All Category, Record Category, and Workflow attributes are identical for all Oracle Content Services documents spawned by the same document in Ascent Capture.

File Names and Extensions of Released Documents

Based on the selection of the type of file to be released (TIFF or PDF), a file extension of .TIF or .PDF is automatically appended to the released documents. For example, if a document name is linked to the Ascent Value GUID, the released file would be named <GUID>.TIF or <GUID>.PDF

Here are three scenarios:

- If you link the Document Name attribute with the Ascent Value {First Page Original File Name}, released documents will always end in .TIF: for example, if the file name was myfile.tif and the image type was Multipage TIFF, the image file will be myfile.tif. If you select Kofax PDF as the image type, the document would be named myfile.TIF.PDF.
- If the linked Document Name was myfile.tif and Kofax PDF is the image type, the released file names would be:
 - myfile.tif.PDF (the document containing the images)
 - myfile.tif_OCR.txt (the OCR content text file)
- If the linked Document Name was myfile.pdf and Multipage TIFF is the image type, the released file names would be:
 - myfile.pdf.TIF (image)
 - myfile.pdf_OCR.txt (text file)

Kofax PDF Options

To release Kofax PDF documents, you must add the PDF Generator module to your applicable batch class, enable PDF generation in your applicable document class, and select Kofax PDF as the release image type in the release script setup Image Settings tab.

Refer to the Ascent 7.0 Release Script for Oracle Content Services 10g Help for details about how Kofax PDF documents and non-image files are released to Oracle Content Services (search for: *File Format/Compression Format Combinations*).

► To add the 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 Select “Enable Kofax PDF generation” 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.

► **To select Kofax PDF as the release image type**

- 1 From the release script setup, select the **Image Settings** tab.
- 2 In the **Release Image As** field, select **Kofax PDF**.
- 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 the Kofax PDF Generator module, refer to the *Getting Started with Ascent Capture* guide.

OCR Full Text Options

To release OCR full text files, you must enable the “Release OCR with document” option on the **Release Setup | Image Settings** tab. In addition, you must select “Enable OCR full text” in your applicable **Document Class Properties OCR** tab and add the **OCR Full Text** module to your applicable batch class.

► **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 Select “**Enable OCR full text**” 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.

Installing the Release Script

You can install the Ascent 7.0 Release Script for Oracle Content Services 10g on an Ascent Capture server, client workstation, or standalone workstation.

Important Note About Installation

To install the Ascent 7.0 Release Script for Oracle Content Services 10g, you must have Windows administrator privileges. If you do not have administrator privileges, you may receive error messages and several of the files may not install correctly.

Tip If the Ascent Capture Administration module is running during release script installation, automatic registration cannot occur. The topic *Registration in Ascent Capture Release Script Manager* contains information about using the Ascent Capture Release Script Manager to register release scripts.

Before you install the Ascent 7.0 Release Script for Oracle Content Services 10g, refer to *System Requirements* on page 1 for information about installation requirements.

Installation Instructions

Follow the instructions below to install the Ascent 7.0 Release Script for Oracle Content Services 10g.

► To install the release script

- 1 Close the Ascent Capture Administration module if it is running (the release script will not be automatically registered if the Administration module is running).
- 2 Insert your Ascent 7.0 Release Script for Oracle Content Services 10g installation CD into your CD drive.
- 3 From your Windows task bar, select Start | Run, browse to the Oracle\CS10 folder on the CD, and run Setup.exe. The installation program will start.
- 4 Follow the instructions on the screen to install the release script.
- 5 When the installation is complete, a message will display indicating that the release script was successfully installed.
- 6 Verify that automatic registration occurred by making sure the release script is listed in the Ascent Capture Release Script Manager (see *Registration in Ascent Capture Release Script Manager* below for instructions).
- 7 Repeat this procedure on all Ascent Capture Administration and Release workstations that will use the release script.

Registration in Ascent Capture Release Script Manager

You can verify that the release script was successfully registered and, if necessary, you can manually install and register it in Ascent Capture.

► To verify that the release script was installed and registered

- 1 Start the Ascent Capture Administration module, and select Tools | Release Script Manager from the main toolbar. The Release Script Manager dialog box will display (Figure 1). If the title Ascent 7.0 Oracle Content Services 10g is in the list, then the Setup.exe installation successfully registered the release script. If not, continue with the following steps.

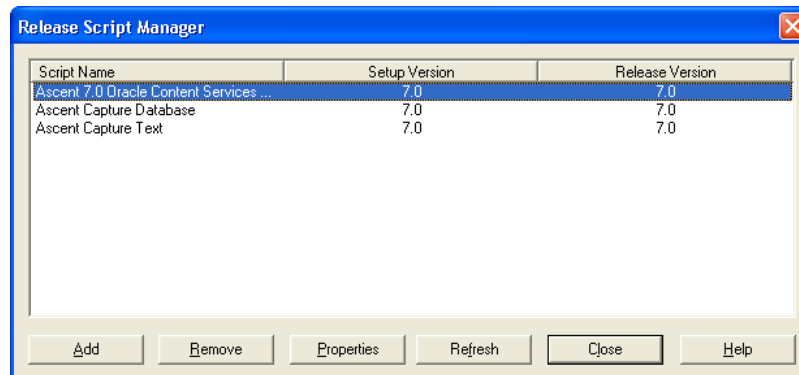


Figure 1. Release Script Manager Dialog Box

- 2 Click Add. The standard Windows Open dialog box (Figure 2) will display.

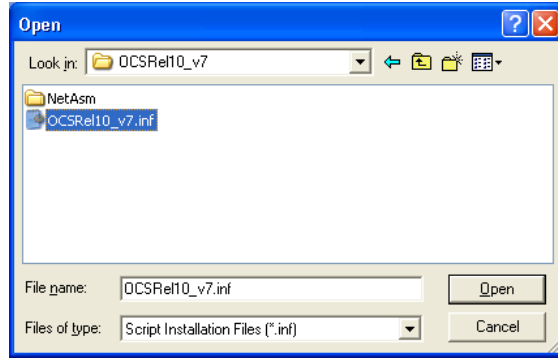


Figure 2. Windows Open Dialog Box

- 3 Navigate to the <Ascent installation folder>\Cap\OCSRel10_v7 folder and select the OCSRel10_v7.inf file and click Open. The Add Release Scripts dialog box will display (Figure 3).

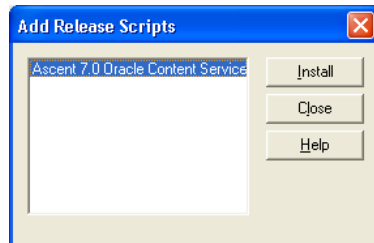


Figure 3. Add Release Scripts Dialog Box

- 4 Select the release script title and click Install. After installation and registration is done, you will receive the message “Registration complete.” Click OK to dismiss the message and then close the Add Release Scripts dialog box. You will see the release script title added to the Release Script Manager list.

Application Maintenance

This section describes how to repair or remove the Ascent 7.0 Release Script for Oracle Content Services 10g.

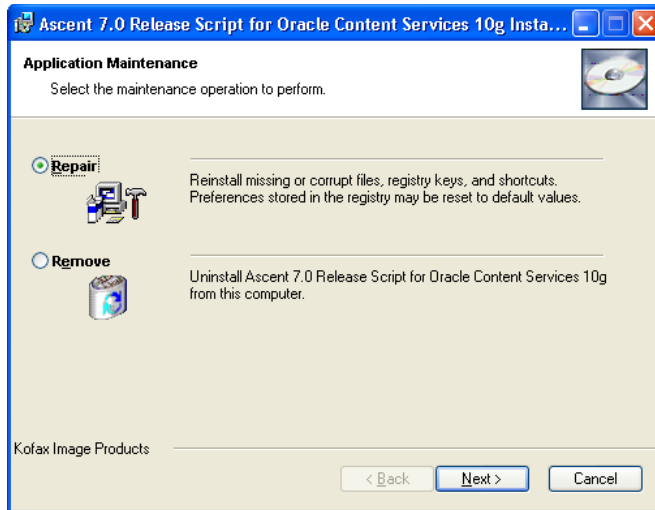


Figure 4. Application Maintenance Dialog Box

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 Oracle Content Services 10g installation CD into your CD drive.
- 2 From your Windows task bar, select Start | Run, browse to the Oracle\OCS 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 4.
- 4 From the Application Maintenance dialog box, select Repair 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 uninstall the release script.

► To remove the release script

- 1 Insert your Ascent 7.0 Release Script for Oracle Content Services 10g installation CD into your CD drive.
- 2 From your Windows task bar, select Start | Run, browse to the Oracle\OCS 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 4.
- 4 From the Application Maintenance dialog box, select Remove and then click Next.
- 5 Follow the instructions on the screen to remove 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 Ascent 7.0 Release Script for Oracle Content Services 10g.

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

Refer to *Canceling During Release Script Uninstallation* on page 26 for information about a known problem.

Note After uninstalling, the Ascent 7.0 Release Script for Oracle Content Services 10g will continue to display in the Ascent Capture 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 release script from the Assigned Release Scripts list and click Remove. You must do this for every instance of the Oracle Content Services release script. After all references to the release script are removed, you will be able to delete the Ascent 7.0 Release Script for Oracle Content Services 10g from the Ascent Capture 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, Kofax PDF documents, eDocuments, and index data.

To release to Oracle Content Services, the user who sets up the release script must have the following:

- A valid Oracle Content Services user name and password
- Access permissions to create new folders and modify existing folders
- Access permission to connect to the Oracle Content Services site

Contact your Oracle Content Services administrator for assistance.

► 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 from 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.

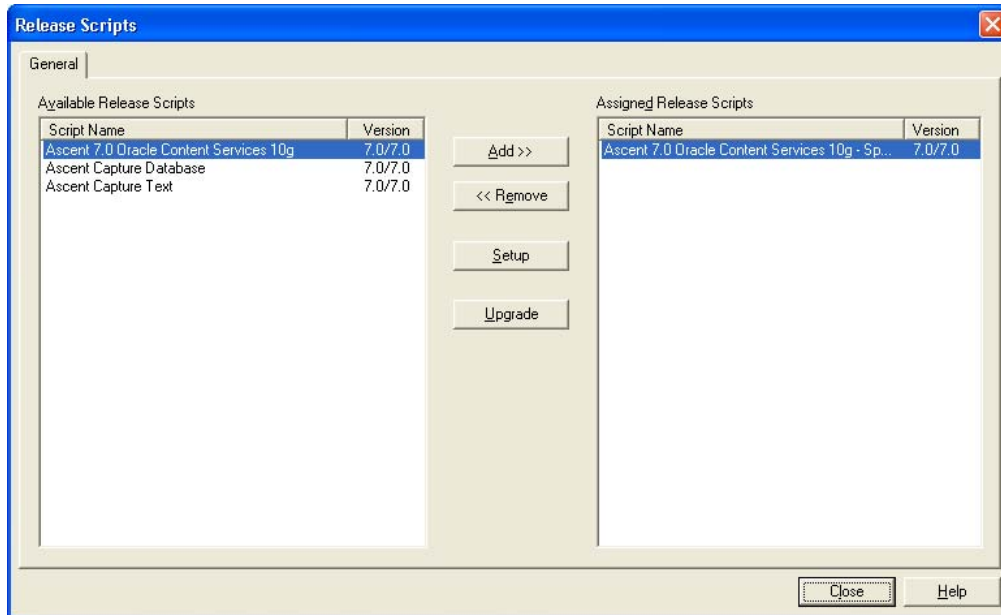


Figure 5. Release Scripts Dialog Box

- 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 Ascent 7.0 Release Script for Oracle Content Services 10g and click Add. The Oracle Content Services Login Information dialog box will display (Figure 6).

Enter your Oracle Content Services user name and password, and the URL of the Oracle Content Services site, including the port number (if applicable) and content subfolder. For example, <http://linuxoracle.kofax.com:7778/content>.

- User name is case-insensitive.
- Password is case-sensitive.
- The content subfolder portion of the URL (anything following the first *single* forward slash, as after 7778 in the example above) is case-sensitive. Anything before the first single forward slash is case-insensitive.

This login information will also be used to log on to the Oracle Content Services release root location during release.

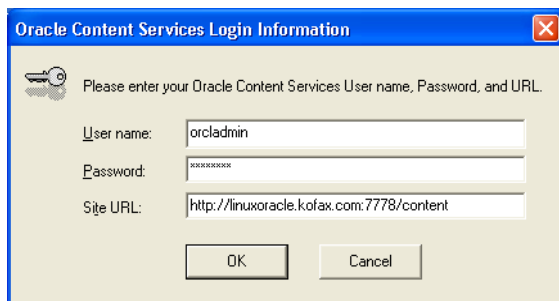


Figure 6. Login Information Dialog Box

- 5 Click OK. The Ascent 7.0 Release Script for Oracle Content Services 10g – Release Setup dialog box will display (Figure 7).

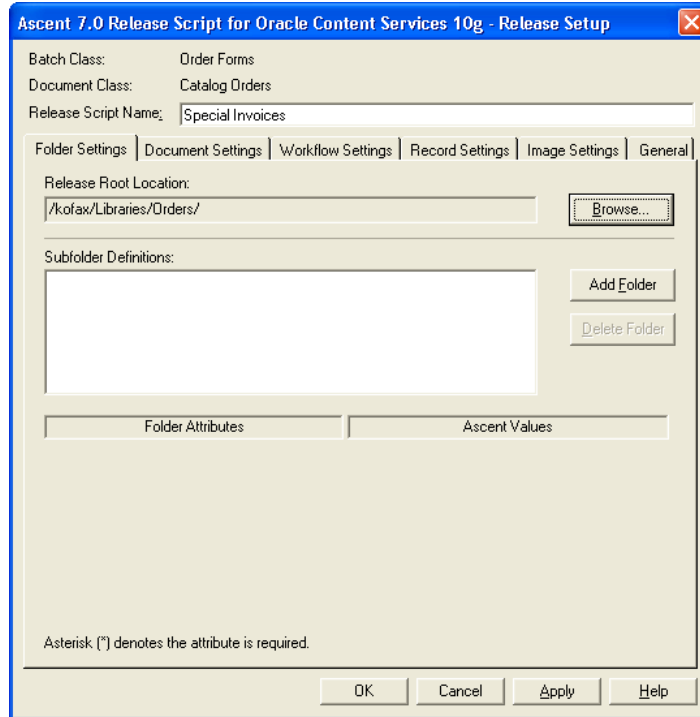


Figure 7. Release Setup Dialog Box

- 6 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 Oracle Content Services 10g.

Tip Specific Help for each of the tabs in the Ascent 7.0 Release Script for Oracle Content Services 10g – Release Setup dialog box can be viewed by clicking Help.

Folder Settings Tab

This tab allows you to specify the Oracle Content Services Release Root Location to be used for release, and to link Content Services Folder attributes to Ascent Values if you choose to add a new folder.

Tip Only libraries or folders are valid release root locations: a container or a site may not be used.

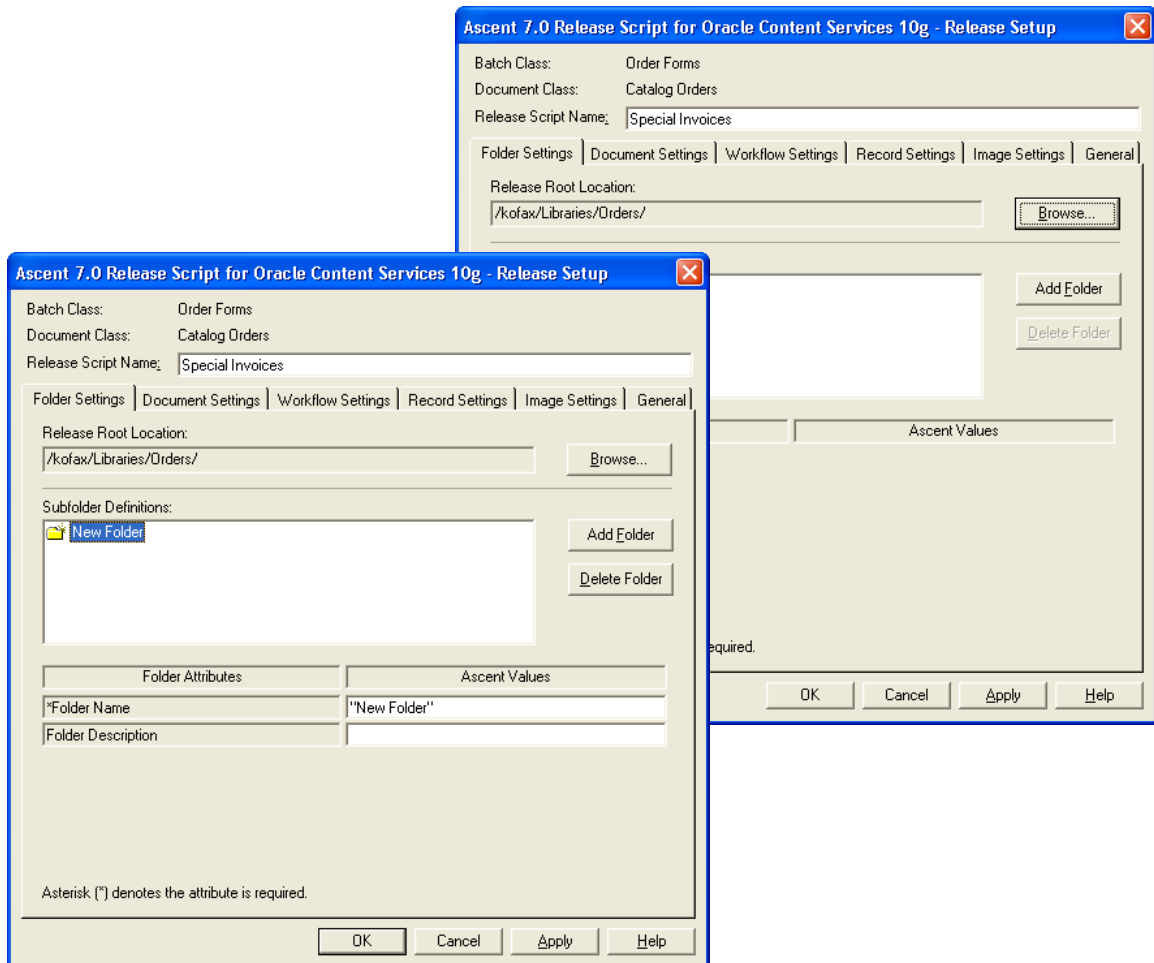


Figure 8. Folder Settings Tab: Release Root Location (right) and New Folder Added (left)

Document Settings Tab

This tab allows you to link Ascent Values to the various Oracle Content Services category attributes that are assigned to the release root location.

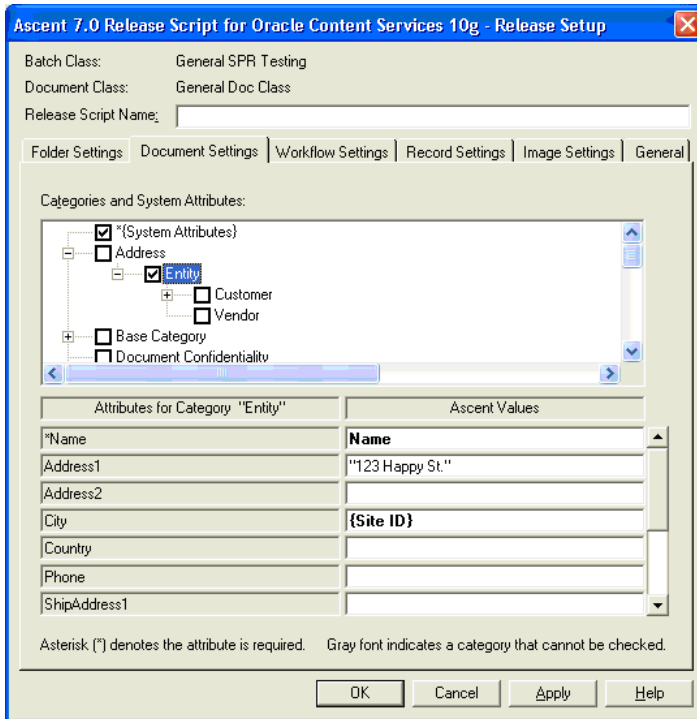


Figure 9. Document Settings Tab

Workflow Settings Tab

This tab allows you to link Ascent Values to the various workflow parameters that are assigned to the Workflow for Upload Document associated with the release root location.

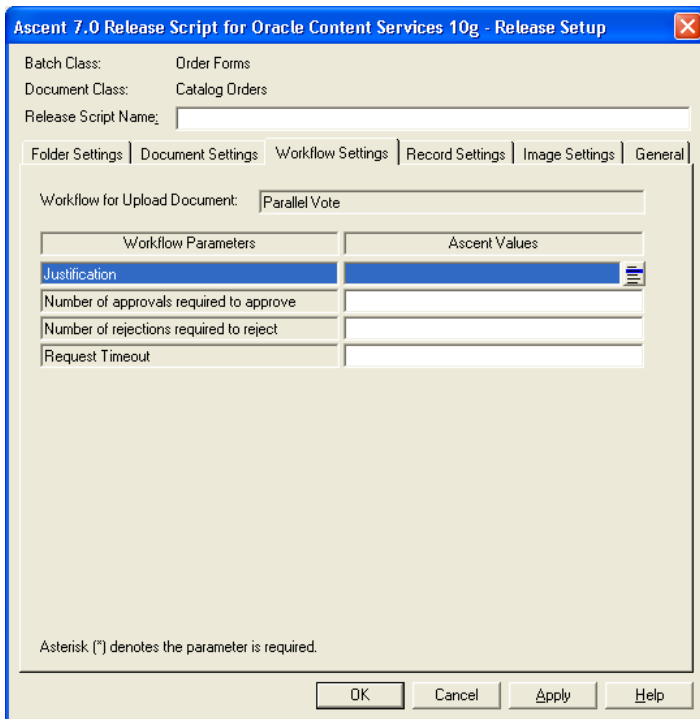


Figure 10. Workflow Settings Tab

Record Settings Tab

This tab allows you to link Ascent Values to the record attributes of the Record Category or Record Folder that is set at the release root location.

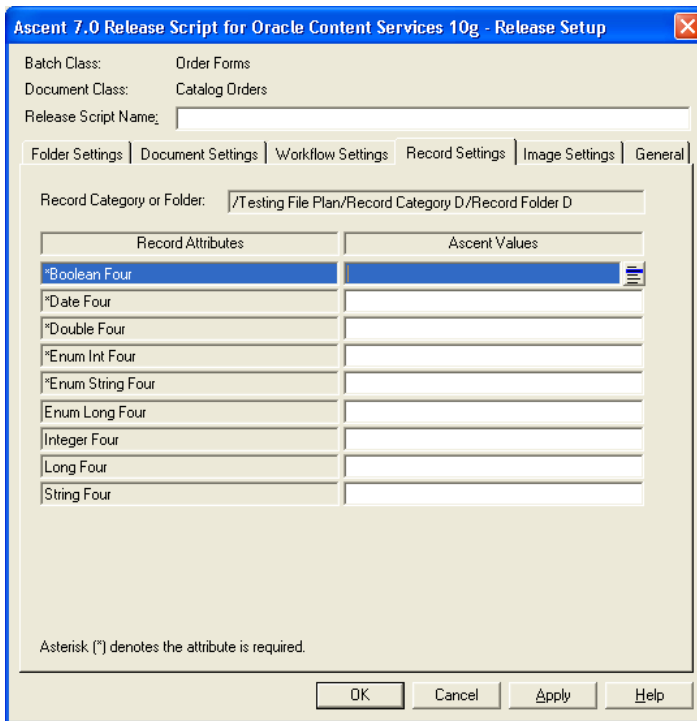


Figure 11. Record Settings Tab

Image Settings Tab

This tab allows you to select the desired image format for releasing your images, and specify whether to release OCR full text files with your document.

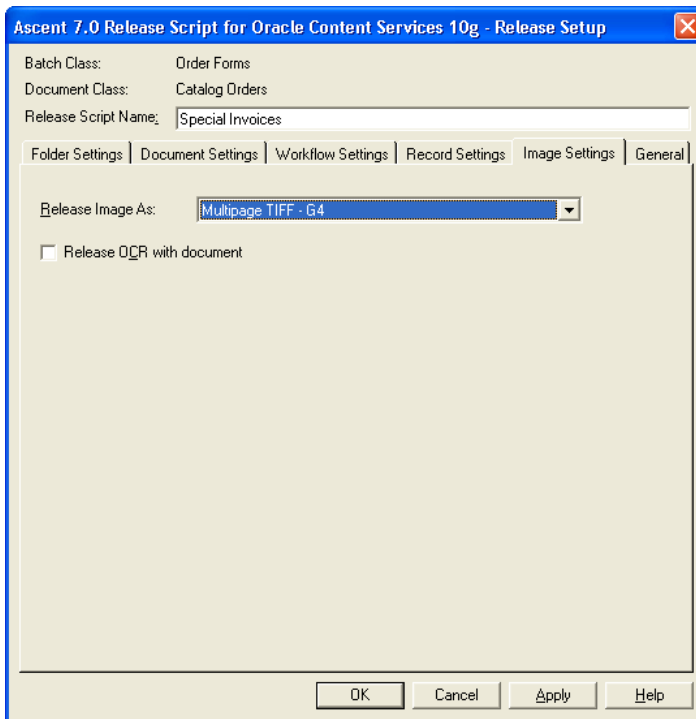


Figure 12. Image Settings Tab

General Tab

This tab allows you to specify a Release working directory as the temporary storage location to be used at release time, to specify whether to skip the first page of each document, and to indicate how to handle login validation at release.

Setting a Working Directory Using a UNC Path

When you enter a UNC path for the “Release working directory” on the General tab and click Apply or OK, you will receive a warning message that the directory is invalid and to please specify a valid path if you specified a directory that:

- Already exists but is not shared
- Does not exist and does not have a shared parent with inheritance set to share all subfolders (this would also include a root directory)

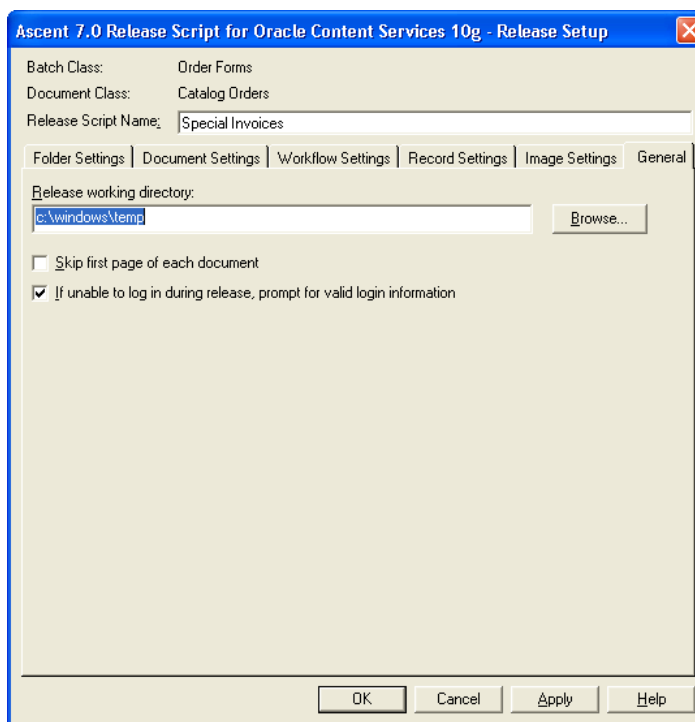


Figure 13. General Tab

Publishing a Batch Class

After you select all your batch class settings—and every time you make changes—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 display along with the recommended actions for fixing the problems.

If you ever decide to edit your batch class, you must republish your batch class before your changes can be used. Your changes will not be applied to batches created before the batch class was republished.

Tip Changes made to the release script are the same as changes to the batch class, so to apply any changes made to either the release setup or to the batch class, you must republish the batch class. Any changes you make will not be applied to batches created before the batch class was republished.

► 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, error or warning 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 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.

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

Releasing Batches

With the Ascent 7.0 Release Script for Oracle Content Services 10g, 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 Help for more information about configuring the Release module (Ascent Capture Help keyword: *Release module > about*). You can display Ascent Capture 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.

Note If the Oracle Content Services Login Information dialog box displays, enter your user name and password, and click OK.

- 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.
- 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 Oracle Content Services 10g.

Installing to Mapped Drives on Windows XP

If you are installing the Ascent 7.0 Release Script for Oracle Content Services 10g on a Windows XP Professional workstation and you specify a mapped drive, you will receive the following error message. (SPR 00024611)

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

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

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

Canceling During Release Script Uninstallation

If you click Cancel 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 Cancel 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.

Workaround: If this problem occurs, run Repair. Refer to *Repairing the Release Script* on page 15 for more information. Alternatively, you can re-register the release script in the Ascent Capture Release Script Manager.

Release Root Location Unavailable

If a release root location is deleted or the permissions to a particular Oracle Content Services root release location have been suddenly revoked for the user who set up the release script and a batch using the script is released, the release will fail with the following error message. The document will be rejected and routed to the Ascent Capture Quality Control module.

The user <username> does not have sufficient permission(s) to release a document to the release location <releaserootlocation>. Please verify that you have the appropriate permissions.

Your Oracle Content Services system administrator will need to restore the access permissions to the user. Then, unreject the documents in error and re-release the batch. Once the batch is successfully released, the user's permissions can be revoked.

Removing and Restoring Attributes in Oracle Content Services

Ascent values are linked to Oracle Content Services attributes by the attribute's ID, not the attribute's name. Therefore, if a linked attribute in the release script is deleted in Oracle Content Services and then added back with the same name – which will now have a different ID – you will not receive a warning when you open release setup. The link value will have been cleared from the release setup, and all documents sent to release after the attribute deletion will be rejected and routed to the Ascent Capture Quality Control module. (SPR 00023344)

Workaround: Adjust the release script by adding the newly added attributes and re-release the documents.

Note Since the links use attribute IDs, attributes that are simply renamed will not cause release failure and the new names will display when the release script release setup is refreshed.

Regional Locales Must Match

To avoid incorrect character display in Release Setup and other compatibility issues, your Ascent Capture system and the Oracle Content Services system must use the same locale. (SPR 00024360)

Unsupported Parameters and Attributes

Workflows assigned to Upload Document event that have required parameters of type "Date" are not supported. Also not supported are category attributes and workflow parameters of type "User," "Time Period," or "Group." (SPR 00024673)

Note Workflow date parameters may work when all Regional Settings are English (United States), but they will not work in other languages. Therefore, it is recommended that a release root location with a workflow that has a date parameter be used only if the date parameter is optional and also is not linked in release setup. These restrictions should be observed carefully when there is a chance that the release script will be deployed on a computer using a Regional Setting other than English (United States).

Workaround: Do not select a release root location with unsupported attribute types.

Workflow Parameter Values May be Passed to an Unassigned Workflow

If the name of a subfolder defined in release setup is the same name as an existing Oracle Content Services folder, some workflow parameter values may be passed to the subfolder at release even when it has a different assigned workflow than the release root location. This is because release setup uses the parameters of the release root location. (SPR 00024080)

Example

Setup in Oracle Content Services of a parent and child structure:

Library A: Parallel Vote workflow

Folder B: Serial Approval workflow

Release script release setup:

Library A is selected as the release root location

A subfolder definition is added that will select Folder B

On the Workflow Settings tab, parameters for the Parallel Vote workflow will display.

Release will succeed and the workflow parameter values specified for the Parallel Vote workflow will be passed to Folder B Serial Approval workflow if either of the following is true:

- No links are made (i.e., default values will be used).
- The *only* values linked are to one or more of the parameters that are common to both workflow types – for example, Justification and Request Timeout.

Release will fail if values are linked for one or more of the parameters that are not common to both workflows – for example, “Number of approvals required to approve.”

Workaround: When adding a subfolder definition, make sure that any existing subfolders that may be selected by the definition have an Upload Document workflow with parameters that match any parameters linked in release setup.

Restricted Category Attributes Are Passed

If the name of a subfolder defined in release setup is the same name as an existing Oracle Content Services folder, the release root location’s category and attributes may be passed to the subfolder at release regardless of its category restrictions. This is because release setup uses the allowed categories of the release root location. (SPR 00024068)

Example

Setup in Oracle Content Services of a parent and child structure:

Library 1: Allows only the Invoice category

Folder 1: Allows only the Expense category

Release script release setup:

Library 1 is selected as the release root location

Folder 1 is added as a new subfolder definition

On the Document Settings tab, attributes for the Invoice category will display.

Release will succeed and the Invoice category and attributes will be passed to the document in Folder 1.

Workaround: When adding a subfolder definition, make sure that the allowed categories of the release root location match those of any existing subfolders that may be selected by the definition.

Linked Attributes of Data Types “Long” May Fail Release

Linking an Oracle Content Services attribute that has a data type of “long” to an Ascent Value that has a double field type longer than 15 digits may cause release to fail. This is because Ascent Capture converts double field types to scientific format. (SPR_00023565)

Workaround: Use a double data type for the attribute.

Unchecking Categories with Linked Values

When you uncheck a category that has a linked value on the Document Settings tab, a warning message (Figure 14) should display. However, if the mouse is moved so that the cursor is slightly outside the check box boundary as you are unchecking, the box will appear unchecked but the values will remain linked. (SPR 00023821)

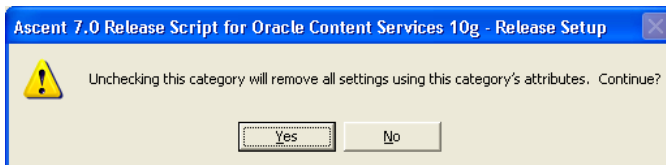


Figure 14. Unchecking Category Warning Message

Workaround: If you see values remaining linked to an unchecked category, recheck the category check box and then uncheck it, making sure you release the mouse button within the check box boundaries. The message in Figure 14 should display for verification and the values will unlink.

Unavailable Categories Can Appear Selected

On the Document Settings tab, Categories that are not available are displayed in a grayed state (indicating they are unavailable), and you should not be able to check an unavailable check box. However, if you begin to make a check by clicking the mouse button in the check box boundary but move the mouse slightly and release the button slightly outside the check box boundary, the box will appear checked. This is a display issue only: you cannot link values to unavailable categories. (SPR 00023342)

Workaround: Do not attempt to mark the check boxes of categories that are grayed.

Release Failure if Prompted Workflow Parameters are Not Linked

If prompted workflow parameters are not linked during release setup, no warning prompt is displayed and release will fail. The message at release failure is similar to the following: (SPR 23936)

A prompted workflow parameter is not linked. Please verify that all prompted workflow parameters are linked and try again.

Workaround: Make sure all prompted workflow parameters are linked in release setup.

Unhelpful Message at Login for SSL Certificate Problems

When you log into release setup to an SSL-enabled Oracle Content Services site and there is a problem with the certificate (the host name is incorrect, the certificate is expired, or the certificate is not trusted), the error message you receive does not describe the situation. The actual message that displays is shown below in Figure 15. (SPR 00025152 and SPR 25154)



Figure 15. Unhelpful Error Message Displayed for SSL Certificate Problems

Note The release script does not support SSL when it is enabled using the default Oracle Content Services wallet, even if the certificate is imported into the list of trusted certificates. The CN (common name) used to issue the certificate would prevent the user from logging in into the release script.

Workaround: Have the Oracle Content Services administrator check for and correct any security certificate problems.

Tip One way to determine if there is a certificate problem is to attempt to log in to the Oracle Content Services URL from a browser, using the same user name and password that caused the message to display. You would be prompted if there was a problem with the certificate.
