

# **KOFAX Capture**

Ascent® 7.5 Release Script  
for Microsoft Office SharePoint 2007  
Release Notes



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# Contents

|  |    |
|--|----|
| Introduction .....   | 5  |
| Additional Documentation .....   | 5  |
| System Requirements .....  | 6  |
| Microsoft Office .....   | 6  |
| Client Operating System Support .....  | 6  |
| Administration and Release Workstations - Additional Requirements .....                | 6  |
| Source Code .....  | 7  |
| Features .....   | 8  |
| Unicode Support .....  | 8  |
| Image Support .....  | 8  |
| Kofax PDF Support .....  | 8  |
| eDocument Support .....  | 8  |
| OCR Full Text Support .....  | 8  |
| Specify Storage Location for Released Documents .....                                  | 9  |
| Assign Ascent Values to Document Attributes (SharePoint columns) .....                 | 9  |
| Specify Whether to Prompt for Credentials if Authentication Fails During Release ..... | 9  |
| eDocument Original File Name Retention .....   | 9  |
| Online Help Available for Release Setup .....  | 9  |
| Additional Information .....   | 10 |
| “Forms” Name is Not Supported .....  | 10 |
| File Names and Extensions of Released Documents .....                                  | 10 |
| Examples .....   | 10 |
| OCR File Naming .....  | 10 |
| Kofax PDF Options .....  | 10 |
| OCR Full Text Options .....  | 11 |
| Skip First Page .....  | 11 |
| Multiple Document Naming .....   | 12 |
| Release Working Folder .....   | 12 |
| Compiling the Release Script Requires NUnit .....                                      | 13 |
| Multiple Instance Support .....  | 13 |
| Installing the Release Script .....  | 15 |
| Important Note About Installation .....  | 15 |
| Installation Instructions .....  | 15 |
| Application Maintenance .....  | 16 |
| Repairing the Release Script .....   | 16 |
| Removing the Release Script .....  | 16 |
| Logging On to the Release Script .....   | 18 |
| Setting Up the Release Script .....  | 20 |

|  |    |
|--|----|
| Destination Settings Tab .....   | 20 |
| Release Root Destination Dialog .....  | 21 |
| Document Settings Tab .....  | 22 |
| Image Settings Tab .....   | 23 |
| General Settings Tab .....   | 24 |
| Browse For Folder Dialog .....   | 25 |
| Publishing a Batch Class .....   | 26 |
| Releasing Batches .....  | 27 |
| Known Problems .....   | 28 |
| Deleting and Re-Creating a SharePoint Library May Result in an Error .....       | 28 |
| Deleting and Re-Creating a SharePoint Content Type May Result in a Warning ..... | 28 |
| Deleting and Re-Creating a SharePoint Column May Result in Warnings .....        | 29 |
| Release Script May Transfer Out-of-Range Numeric Data .....                      | 29 |
| Limit on Length of SharePoint Column Names .....                                 | 29 |
| Release May Fail with Access Denied Error .....                                  | 30 |
| Release May Fail with Missing Attributes Message .....                           | 30 |
| File Types Associated with Default Content Type .....                            | 30 |
| Any Value Can Be Released to a Choice Column .....                               | 30 |
| URLs Containing Commas Are Ignored .....   | 31 |
| PDF and eDoc Combination Yields Blank Document .....                             | 31 |
| Invalid Folder Name Characters .....   | 31 |
| Invalid Filename Characters .....  | 31 |
| Multiple Lines of Strings .....  | 32 |
| Number Column Type and Scientific Notation .....                                 | 32 |
| Incorrect Release of Document with One Image and Multiple eDocs .....            | 32 |
| Release May Succeed with Invalid Credentials .....                               | 33 |
| Runtime Error Temporarily Displays When Closing the Administration Module .....  | 33 |
| SharePoint Versioning is Not Supported .....                                     | 33 |
| Kofax Technical Support .....  | 33 |

## Introduction

This document contains the release notes for Ascent 7.5 Release Script for Microsoft SharePoint 2007, which supports Microsoft Office SharePoint 2007. This release script copies document images, OCR full text files, Kofax PDF documents, and eDocuments to permanent storage and writes data from Ascent Capture into the Microsoft Office SharePoint 2007 repository.

Please read these release notes carefully as they contain information not included in the Ascent Capture online 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 and Ascent Capture Internet Server*
- *Installation Guide for Ascent Capture and Ascent Capture Internet Server*
- *Learning Ascent Capture*
- Help provided from any of the Ascent Capture modules
- Help provided with Ascent 7.5 Release Script for Microsoft Office SharePoint 2007

For more information about Microsoft Office SharePoint 2007 or other Microsoft products, contact your Microsoft Office SharePoint 2007 representative or refer to the documentation that came with your Microsoft Office SharePoint 2007 product.

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

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## System Requirements

Ascent 7.5 Release Script for Microsoft Office SharePoint 2007 requires the following components to be installed prior to installing this release script.

### Microsoft Office

Ascent 7.5 Release Script for Microsoft Office SharePoint 2007 supports the following network server components:

- Microsoft Office SharePoint Server (MOSS) 2007
- Windows SharePoint Services (WSS)

### Client Operating System Support

Ascent 7.5 Release Script for Microsoft Office SharePoint 2007 supports the following client operating systems:

- Microsoft Windows 2000 Professional with Service Pack 4
- Microsoft Windows 2000 Advanced Server with Service Pack 4
- Microsoft Windows Server 2003 (Standard or Enterprise Edition)
- Microsoft Windows XP Professional with Service Pack 3

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**Note** At the time of publishing these release notes, Ascent 7.5 Release Script for Microsoft Office SharePoint 2007 was certified with the Service Packs listed above.

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### Administration and Release Workstations – Additional Requirements

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

- Ascent Capture 7.5. All service packs are supported.
- Kofax Capture 8. All service packs are supported.

## Source Code

The source code for this release script is provided and it is located on Ascent 7.5 Release Script for Microsoft Office SharePoint 2007 installation CD in the MS\SP folder. The source code can be opened, edited, and compiled in Microsoft Visual Studio 2005.

### ► To modify the release script

- 1 Install the Microsoft Office SharePoint 2007 release script. Refer to *Installing the Release Script* on page 15 for the installation instructions. When you install the Microsoft Office SharePoint 2007 release script, you will install the required components referenced in the source code.

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**Note** If the release script was not installed to the default folder (C:\Program Files\Ascent\Cap\), there will be errors related to TAPCommon references when you attempt to compile the source code. To fix these errors, update the TAPCommon reference paths in Microsoft Visual Studio 2005 to reference their correct locations in the non-default installation folder.

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- 2 Open, make any desired modifications, and compile the Microsoft Office SharePoint 2007 source code in Microsoft Visual Studio 2005.
- 3 Copy the Kofax.SPRel07\_v7.ReleaseScript.dll to the installation folder (for example, C:\Program Files\Ascent\CAP\SP\Kofax.SPRel07\_v7.ReleaseScript.dll). When you are prompted to replace the existing file, select "Yes." You will need to repeat this procedure on each Administration and Release workstation that will be using the Microsoft Office SharePoint 2007 release script.

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**Note** In order to successfully modify and compile the release script, development must occur on a workstation with the appropriate versions of Ascent Capture, TAPCommon, and NUnit 2.4.8 for .NET 2.0 previously installed. To use the modified release script, you must replace the Microsoft Office SharePoint 2007 release script Kofax.SPRel07\_v7.ReleaseScript.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 Microsoft Office SharePoint 2007 product and Microsoft Visual Studio 2005 documentation for assistance.

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## Features

This section contains information about features provided with Ascent 7.5 Release Script for Microsoft Office SharePoint 2007.

### Unicode Support

The Ascent 7.5 Release Script for Microsoft Office SharePoint 2007 supports Unicode with Kofax Capture 8 or later.

### Image Support

This release script supports the following file formats / compression formats:

- Multipage TIFF – Group 4 Compression
- Multipage TIFF – Group 3 Compression
- Multipage TIFF – Group 3/2D Compression
- Multipage TIFF – Uncompressed Image Format
- Multipage TIFF – JPEG Compression
- Kofax PDF

### Kofax PDF Support

With the Ascent 7.5 Release Script for Microsoft Office SharePoint 2007, you can release Kofax PDF documents into the Microsoft Office SharePoint 2007 repository. Kofax PDF is bundled with Ascent Capture and does not require additional software implementation. Kofax PDF documents can be saved in the following output types:

- Kofax PDF Image Only
- Kofax PDF Image + Text

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

### eDocument Support

With the Ascent 7.5 Release Script for Microsoft Office SharePoint 2007, you do not need to limit your batches to image files. eDocuments are supported for release into the Microsoft Office SharePoint 2007 repository. All the documents you want in a batch can be processed together regardless of file type.

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

### OCR Full Text Support

With the Ascent 7.5 Release Script for Microsoft Office SharePoint 2007, you can release documents processed through the Ascent Capture OCR Full Text module into the Microsoft Office SharePoint 2007 repository.

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

## Specify Storage Location for Released Documents

The Ascent 7.5 Release Script for Microsoft Office SharePoint 2007 allows you to specify where in SharePoint you would like to store your released documents. To do so, on the Destination tab, specify a library path and optional folder destination.

## Assign Ascent Values to Document Attributes (SharePoint columns)

The Ascent 7.5 Release Script for Microsoft Office SharePoint 2007 allows you to link Ascent Capture Values to SharePoint columns. This makes it possible to dynamically populate SharePoint with meaningful metadata as you release documents. You can first select a SharePoint content type which displays its associated SharePoint columns. Then, link Ascent Capture Values with each column. During release, it automatically associates metadata with each document released to a SharePoint library.

## Specify Whether to Prompt for Credentials if Authentication Fails During Release

If a release script is unable to log on to SharePoint at release time, you can cause the script to prompt again for a valid user name and password. If the user enters valid login data, document release continues successfully. However, if the user provides invalid credentials or clicks Cancel, no documents are released and the batch routes to the Quality Control module.

If you do not select this option and the release script is unable to log on to SharePoint, the script does not prompt to re-enter valid login data and is not able to successfully release documents.

## eDocument Original File Name Retention

The Ascent 7.5 Release Script for Microsoft Office SharePoint 2007 supports Ascent Capture original file name retention for eDocuments. To retain original filenames of eDocuments:

- Set the SupportsOriginalFileName property to True (SupportsOriginalFileName=True) in the release script SPRel07\_v7.inf file, when the release script is first registered. SPRel07\_v7.inf is located in the folder where you installed the release script (for example, C:\Program Files\Ascent\Cap\SPRel07\_v7\SPRel07\_v7.inf). True is the default setting, and the SupportsOriginalFileName property is not case-sensitive.
- Select 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.

When these two options are set as described, documents released as eDocument files retain their original file names. If a document is released with the SupportsOriginalFileName property set to False, eDocument file names are based on the Document Name attribute linked in release setup.

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**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.

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## Online Help Available for Release Setup

Online Help is installed with your release script. It is available from the Administration module when you are setting up your release script. To display Help information, click the Help button from the Release Setup dialog box.

## Additional Information

This section contains additional information about Ascent 7.5 Release Script for Microsoft Office SharePoint 2007.

### “Forms” Name is Not Supported

This release script does not support using “forms” as the document name or folder name. The “forms” name is reserved on Microsoft Office SharePoint 2007 Server.

### File Names and Extensions of Released Documents

The release script automatically appends a file extension of .TIF or .PDF to released documents depending on which image type that you select. If the Name column's value contains an unexpected file name extension, the resulting file name will contain two extensions.

#### Examples

| Selected image type | Value of the document's Name column | Resulting file name |
|---------------------|-------------------------------------|---------------------|
| Multipage TIFF      | myfile                              | myfile.TIF          |
| Multipage TIFF      | myfile.tif                          | myfile.TIF          |
| Multipage TIFF      | myfile.pdf                          | myfile.pdf.TIF      |
| Kofax PDF           | myfile                              | myfile.PDF          |
| Kofax PDF           | myfile.pdf                          | myfile.PDF          |
| Kofax PDF           | myfile.tif                          | myfile.tif.PDF      |

### OCR File Naming

OCR full text files use the following file naming convention:

*<AscentValue>\_OCR.<extension>*

### Kofax PDF Options

To release Kofax PDF documents, 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.

For details about how Kofax PDF documents and non-image files are released to SharePoint, see the Ascent 7.5 Release Script for Microsoft Office SharePoint 2007 Help.

#### ► 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, see the *Getting Started with Ascent Capture* guide.

## OCR Full Text Options

To release OCR full text files, you must enable the “Release OCR full text file 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.

## 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.

## Multiple Document Naming

When multiple documents are spawned by a single document in Ascent Capture, the release script typically gives them each a file name that ties them to the original document. You can use another file naming scheme when you release eDocuments by checking the “Use the original file name of image and eDocument files” option in the Release Properties dialog box.

The following table shows an example of using both schemes. Given the following document (Document 1), the release script creates files as shown in the table below.

Note that the release script combines the original TIFF images into a single multipage file. The top row displays the results if they are kept as TIFF files. The bottom row displays the results if they are converted to Kofax PDF files. The original PDF, XML, and TXT documents are all imported as eDocuments.

Document 1:

- Page 1: LilisDocument.XML
- Page 2: <unnamed> TIF (scanned page)
- Page 3: TestingNamedImage.TIF
- Page 4: UnitTesting.PDF
- Page 5: SuperDocument.TXT
- Page 6: <unnamed> TIF (scanned page)
- Page 7: Secondbyearly.TIF

**Table 1. Multiple Document Naming**

| Output Type           | Retaining Original File Name   | Not Retaining Original File Name   |
|-----------------------|--|--|
| Multi-page Image Type | <AscentValue>.TIF (Pages 2, 3, 6, 7)<br>LilisDocument.XML (Page 1)<br>UnitTesting.PDF (Page 4)<br>SuperDocument.TXT (Page 5) | <AscentValue>.TIF (Pages 2, 3, 6, 7)<br><AscentValue>_1.XML (Page 1)<br><AscentValue>_2.PDF (Page 4)<br><AscentValue>_3.TXT (Page 5) |
| Kofax PDF             | <AscentValue>.PDF (Pages 2, 3, 6, 7)<br>LilisDocument.XML (Page 1)<br>UnitTesting.PDF (Page 4)<br>SuperDocument.TXT (Page 5) | <AscentValue>.PDF (Pages 2, 3, 6, 7)<br><AscentValue>_1.XML (Page 1)<br><AscentValue>_2.PDF (Page 4)<br><AscentValue>_3.TXT (Page 5) |

Refer to *eDocument Original File Name Retention* on page 9 for more information.

## Release Working Folder

You must specify a release working folder to be used to temporarily store released images.

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**Note** You should specify a release working folder that is writable by all users.

---

By default, the release working folder is:

```
<Drive>:\Documents and Settings\All Users\Application Data\Kofax\
```

At release, if you specified a release working folder other than the default, documents are released to:

```
<specified release working folder>\
```

If the release working folder has been deleted and you run the release script, it is automatically created. After the file transfer is complete, all temporary files and folders are automatically deleted from the release folder.

If the default release working folder does not exist when you publish your batch class, the following warning may display:

```
The directory [<Drive>:\Documents and Settings\All Users\Application
Data\Kofax\] cannot be used as the image release directory for document class
<document class that contains the SharePoint release script> because it
failed with [The system cannot find the path specified.] when attempting to
access it.
```

Because the release script creates this folder, you can safely ignore this warning message.

## Compiling the Release Script Requires NUnit

Currently, the release script contains NUnit code. NUnit is an open source unit testing framework for Microsoft .NET. NUnit testing tools allow the code to conduct unit tests to determine whether various sections of the code are acting as expected in various circumstances. Test cases describe tests that need to be run on the program to verify that the program runs as expected.

If you make modifications to the release script and need to re-build it, you must install NUnit. For more information about NUnit and to obtain NUnit, see [www.nunit.org](http://www.nunit.org). NUnit 2.4.8 for .NET 2.0 is needed to successfully compile the release script.

## Multiple Instance Support

The Multiple Instance Support feature allows you to run multiple instances of any Kofax Capture service on a single computer.

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**Note** When multiple services of the same kind are run on the same computer, a single Concurrent station and Enterprise license are required. For example, in this case, a user would need both an Enterprise license and a single Concurrent station license to run multiple instances of the Release module.

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To use the Multiple Instance Support feature with a release script certified with Kofax Capture 8, you will need to modify the release script's .inf file. The .inf file is located in your Kofax Capture installation folder (for example, C:\Program Files\Kofax\Capture\Cap).

### ► To edit the .inf file on the release workstation

- 1 Locate the .inf file in your release script installation directory. Make a copy of the file for backup purposes, and store the copy in a safe location.
- 2 Right-click the .inf file and a context menu will display.
- 3 From the context menu, select "Open With." Use any text editor to edit this file.

- 4** Add the following to the .inf file:

SupportsMultipleInstances=True

Note that you can add this line anywhere within the custom module's parameter section.

- 5** When you are finished editing this file, save the file.
- 6** You will need to re-register your release script with Kofax Capture.
  - a** Start the Kofax Capture Administration module. The module's main screen will display.
  - b** Select Tools | Release Script Manager and the Release Script Manager dialog box will display.
  - c** From the Release Script Manager dialog box, click Add.
  - d** Browse to the modified release script .inf file. Select the file and click Open.
  - e** The Add Release Scripts dialog box will display.
  - f** From the Add Release Scripts dialog box, select the release script and click Install.
  - g** Click OK and your release script is registered.
  - h** Close the open dialog boxes to complete the process.

## Installing the Release Script

You can install Ascent 7.5 Release Script for Microsoft Office SharePoint 2007 on an Ascent Capture client workstation or standalone workstation.

### Important Note About Installation

To install Ascent 7.5 Release Script for Microsoft Office SharePoint 2007, 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 Ascent 7.5 Release Script for Microsoft Office SharePoint 2007, see *System Requirements* on page 6 for information about installation requirements.

### Installation Instructions

Use the following instructions to install Ascent 7.5 Release Script for Microsoft Office SharePoint 2007.

#### ► To install the release script

- 1 Insert your Ascent 7.5 Release Script for Microsoft Office SharePoint 2007 installation CD into your CD drive.
- 2 From your Windows task bar, select Start | Run, browse to the MS\SP 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 Ascent Capture.

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- 5 Repeat this procedure on all Administration and Release workstations that will use the Microsoft Office SharePoint 2007 release script.

## Application Maintenance

This section describes how to repair and remove Ascent 7.5 Release Script for Microsoft Office SharePoint 2007.



Figure 1. Application Maintenance Dialog Box

### Repairing the Release Script

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

#### ► To repair the release script

- 1 Insert your Ascent 7.5 Release Script for Microsoft Office SharePoint 2007 installation CD into your CD drive.
- 2 From your Windows task bar, select Start | Run, browse to the MS\SP folder on the CD, and run Setup.exe.
- 3 Setup will detect an existing installation and the Application Maintenance dialog box will display, as shown in Figure 1.
- 4 From the Application Maintenance dialog box, 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 delete the release script.

#### ► To remove the release script

- 1 Insert your Ascent 7.5 Release Script for Microsoft Office SharePoint 2007 installation CD into your CD drive.
- 2 From your Windows task bar, select Start | Run, browse to the MS\SP folder on the CD, and run Setup.exe.

- 3 Setup will detect an existing installation and the Application Maintenance dialog box will display, as shown in Refer to Figure 1 on page 16.
- 4 From the Application Maintenance dialog box, select “Remove” and then click Next.
- 5 Follow the instructions on the screen to delete the release script.
- 6 When the uninstallation is complete, a message will display that indicates the release script was successfully uninstalled.

Alternatively, you can use the Add or Remove Programs utility from the Windows Control Panel to uninstall Ascent 7.5 Release Script for Microsoft Office SharePoint 2007.

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

---

**Note** After uninstalling, Ascent 7.5 Release Script for Microsoft Office SharePoint 2007 will continue to display in the Release Script Manager, although it will not be functional. To remove the release script from the list, you must go into every batch class and associated document class, select the applicable release script from the Assigned Release Scripts list and click Remove. You must do this for every instance of the Microsoft Office SharePoint 2007 release script. After all references to the release script are removed, you will be able to delete Ascent 7.5 Release Script for Microsoft Office SharePoint 2007 from the Release Script Manager.

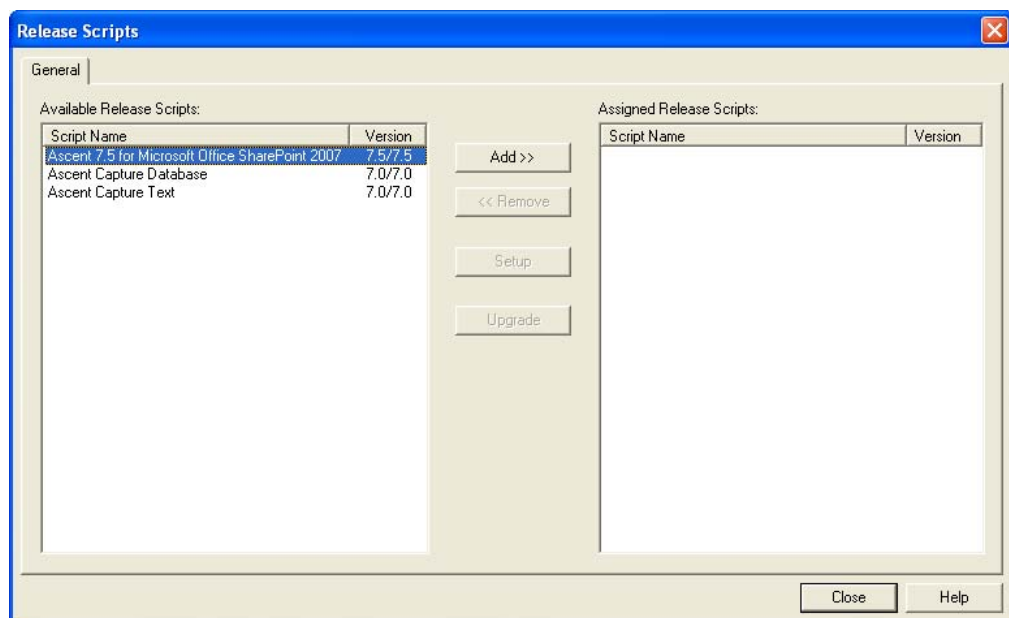
---

## Logging On to the Release Script

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

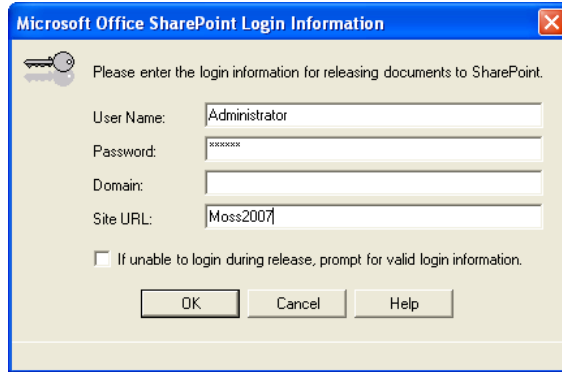
### ► To log on to the release script

- 1 Start the Ascent Capture Administration module. The module's main screen will display.
- 2 Select the Batch class tab 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 2. Release Scripts Dialog Box**

- 4 The Release Scripts dialog box lists all available release scripts. Available release scripts are those that are registered with Ascent Capture. From the Release Scripts dialog box, select the "Ascent 7.5 for Microsoft Office SharePoint 2007" release script and click Add. The Microsoft Office SharePoint Login Information dialog box will display, as shown in Figure 3 on page 19.
- 5 Enter your Microsoft Office SharePoint 2007 user name, password, and domain.  
Note that the domain name property is only used when a different Microsoft Office SharePoint 2007 domain is needed.
- 6 Enter a fully qualified domain name for the Site URL. For more information, see your system administrator.



**Figure 3. Microsoft Office SharePoint Login Information Dialog Box**

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

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- 7 To prompt for a user name and password if the release script is not able to log on to Microsoft Office SharePoint 2007 at release time, select the “If unable to login during release, prompt for valid login information” check box.
  - If selected and there is a problem logging on to the Microsoft Office SharePoint 2007 release script, the Microsoft Office SharePoint Login Information dialog box will display during release. The user may then enter a valid user name and password, and click OK. However, if the user clicks the Cancel button, the release will fail and the batch will be routed to the Ascent Capture Quality Control module.
  - If not selected and problems occur when logging on to the Microsoft Office SharePoint 2007 release script, the Microsoft Office SharePoint Login Information dialog box will not display during release. Release will fail and the batch will be routed to the Ascent Capture Quality Control module.

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**Note** Do not select this feature if you plan to run the Ascent Capture Release module as a service or if you plan to run this module during off-hours. The Microsoft Office SharePoint Login Information dialog box requires a user response, which interferes with the automated nature of running the Release module as a service or without operator attention.

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- 8 Click OK. 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 Ascent 7.5 Release Script for Microsoft Office SharePoint 2007.

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**Note** For more details about the setup options, refer to the online Help available from the Ascent 7.5 Release Script for Microsoft Office SharePoint 2007 – Release Setup dialog box.

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### Destination Settings Tab

This tab allows you to specify the root destination and an optional folder destination to be used for release.

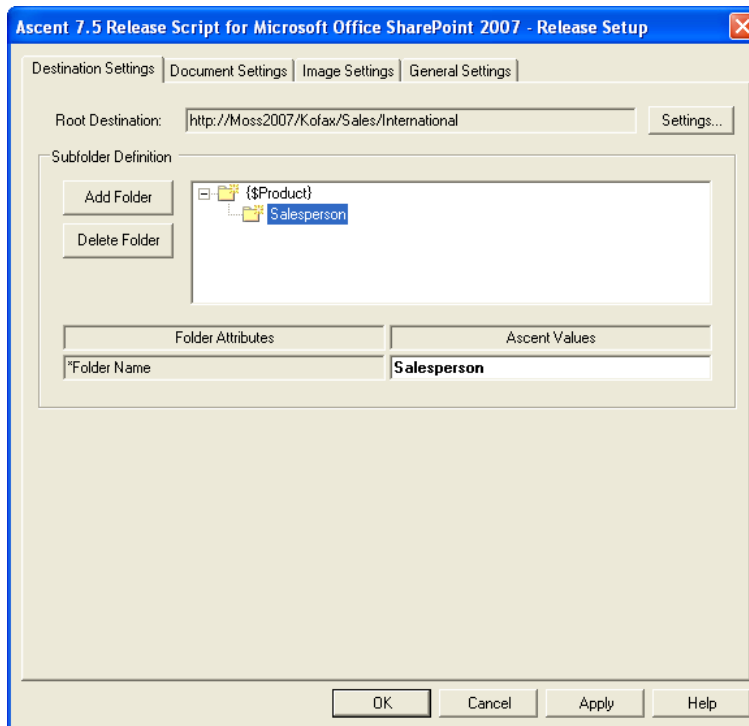
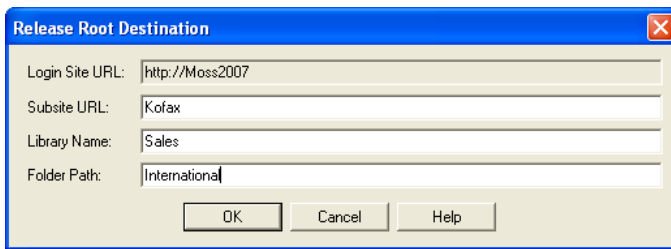


Figure 4. Destination Settings Tab

## Release Root Destination Dialog

This dialog allows you to specify a SharePoint destination.



The image shows a Windows-style dialog box titled "Release Root Destination". It has a blue title bar with a close button (X) in the top right corner. The dialog contains four text input fields, each with a label to its left: "Login Site URL:" with the value "http://Moss2007", "Subsite URL:" with the value "Kofax", "Library Name:" with the value "Sales", and "Folder Path:" with the value "International". At the bottom of the dialog, there are three buttons: "OK", "Cancel", and "Help".

**Figure 5. Release Root Destination Dialog**

## Document Settings Tab

This tab allows you to select a SharePoint content type which displays its associated SharePoint columns. This tab also allows you to link Ascent Capture Values with SharePoint columns.

If a content type has required columns that are linked to unsupported data types, it is not displayed in the list of available content types. For more information, see Data Type Compatibility in the Ascent 7.5 Release Script for Microsoft Office SharePoint 2007 Help.

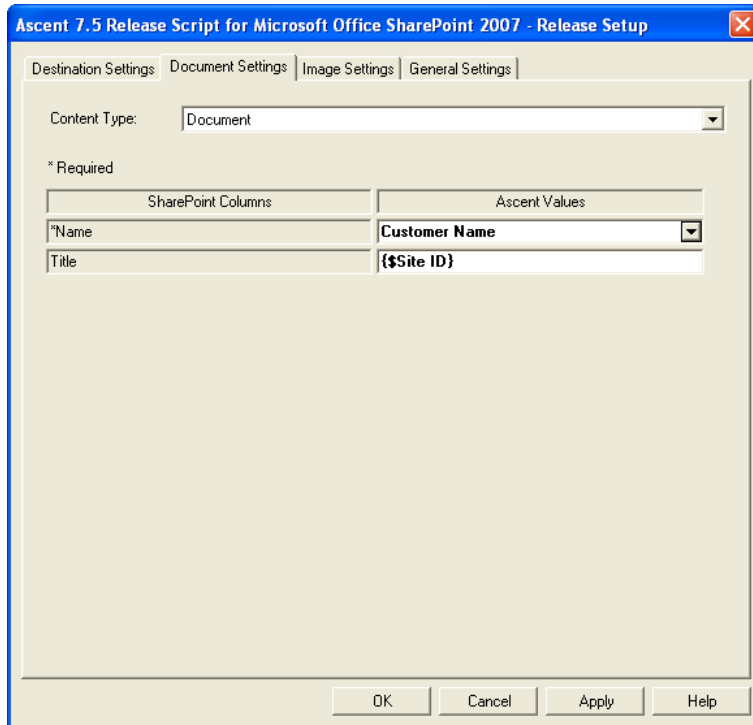


Figure 6. Document Settings Tab

## Image Settings Tab

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

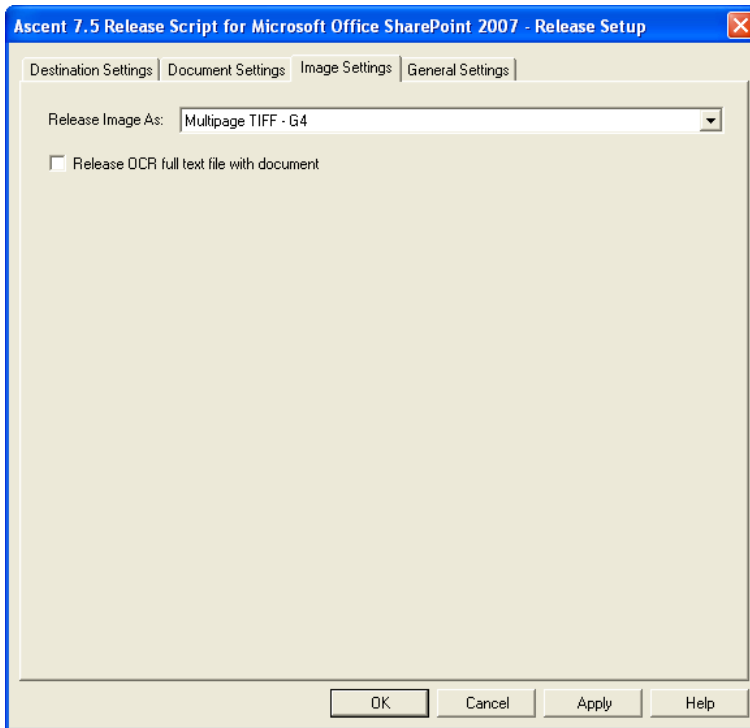


Figure 7. Image Settings Tab

## General Settings Tab

This tab allows you to specify a release working folder as the temporary storage location to be used at release time, and to specify whether to skip the first page of each document.

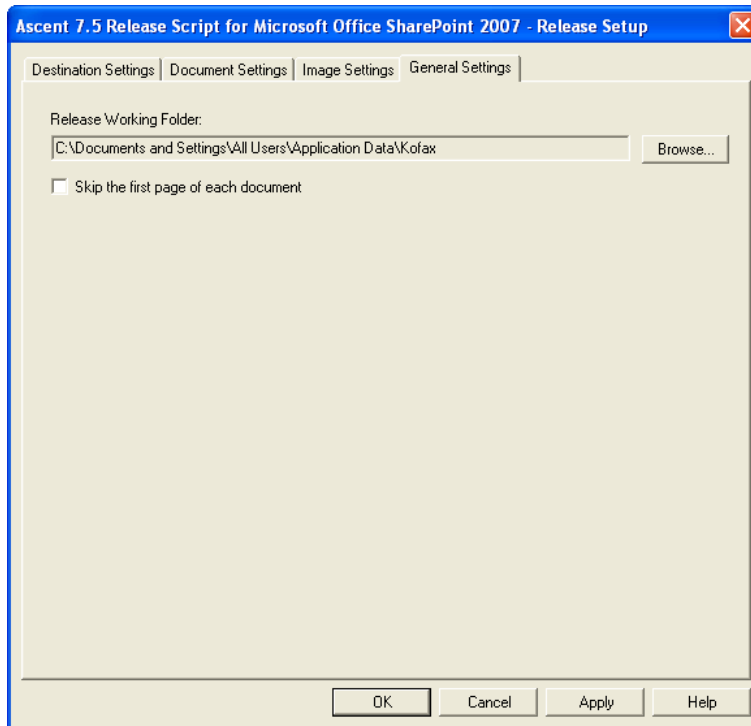


Figure 8. General Settings Tab

## Browse For Folder Dialog

This dialog allows you to specify a release working folder to be used to temporarily store released images. You can select an existing folder or create a new one.

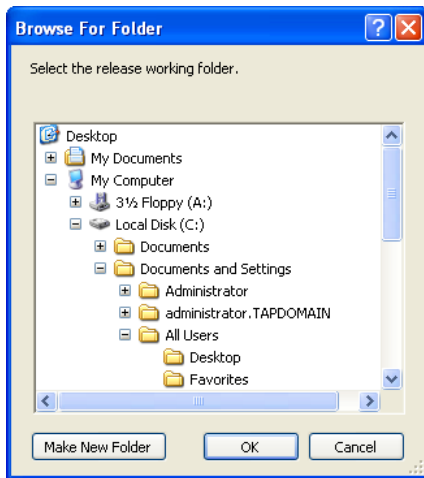


Figure 9. Browse For Folder Dialog

## 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 display along with the recommended actions for fixing the problems.

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

### ► To publish a batch class

- 1 Start the Ascent Capture Administration module. The module's main screen will display.
- 2 Select the Batch class tab from the Definitions panel, and right-click the applicable batch class. A context menu will display.
- 3 From the context menu, select "Publish." The Publish dialog box will display.
- 4 From the Publish dialog box, select your batch class and click Publish. Ascent Capture will check all of your batch class settings and display the results in the Results box.
  - a If no problems are detected, the message "Publishing successful" will display.
  - b If problems are detected, error and/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 for the batch.

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

## Releasing Batches

With Ascent 7.5 Release Script for Microsoft Office SharePoint 2007, 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 properties defined during release setup.

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**Caution** To release to Microsoft Office SharePoint 2007, the logged in user must have both “Add Items” and “Edit Items” permissions to the Microsoft Office SharePoint 2007 repository. Otherwise, the release will fail and the batch will be routed to the Ascent Capture Quality Control module.

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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.

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**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 Microsoft Office SharePoint Login Information dialog box displays, enter your Microsoft Office SharePoint 2007 user name, password, and domain, and click OK. The domain name property is only used when a different Microsoft Office SharePoint 2007 domain is needed.

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- 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 Ascent 7.5 Release Script for Microsoft Office SharePoint 2007.

### Deleting and Re-Creating a SharePoint Library May Result in an Error

Deleting and re-creating a SharePoint library after saving release setup data may result in an error. The system may display this message:

"The previously selected root destination, <root destination>, is not accessible. The location may no longer exist in SharePoint or you no longer have the appropriate permissions. As a result, the root destination settings will be cleared."

This message appears when you perform the following actions:

- 1 Set up a release script for Microsoft Office SharePoint 2007, and specify a root destination.
- 2 Click OK.
- 3 Delete the SharePoint library used by the release script for the root destination.
- 4 Create a SharePoint library with the same name.
- 5 Re-visit release setup.

This message occurs because each SharePoint library has a unique ID. When you delete and re-create a SharePoint library, a new ID is assigned to the library, which breaks the link between the library and the release script.

### Deleting and Re-Creating a SharePoint Content Type May Result in a Warning

Deleting and re-creating a SharePoint content type after saving release setup data may result in a warning. The system may display this message:

"Unable to retrieve the selected content type from the root destination. As a result, all document settings will be cleared."

This message appears when you perform the following actions:

- 1 Set up a release script for Microsoft Office SharePoint 2007, and specify a root destination.
- 2 Switch to the Document Settings Tab and select a content type.
- 3 Link all required SharePoint columns.
- 4 Click OK.
- 5 Delete the SharePoint content type used by the release script.
- 6 Create a SharePoint content type with the same name and columns.
- 7 Re-visit release setup.

This message occurs because each SharePoint content type has a unique ID. When you delete and re-create a SharePoint content type, a new ID is assigned to the content type, which breaks the link between the content type and the release script.

## Deleting and Re-Creating a SharePoint Column May Result in Warnings

Deleting and re-creating a SharePoint column after saving release setup data may result in warnings.

The system may display this message:

"One or more columns could not be found in the selected SharePoint content type. The links for these columns will be removed."

This message appears when you perform the following actions:

- 1 Set up a release script for Microsoft Office SharePoint 2007, and specify a root destination.
- 2 Switch to the Document Settings Tab and select a content type.
- 3 Link at least one non-required SharePoint column and all other required columns.
- 4 Click OK.
- 5 Delete the non-required SharePoint column that is linked in the release script.
- 6 Create a SharePoint column with the same name.
- 7 Re-visit release setup.

The system may also display the following message:

"Please assign an Ascent Capture Value to all required columns."

This message appears when you perform the following actions:

- 1 Set up a release script for Microsoft Office SharePoint 2007, and specify a root destination.
- 2 Switch to the Document Settings Tab and select a content type that contains at least one required SharePoint column.
- 3 Link all required SharePoint columns.
- 4 Click OK.
- 5 Delete one of the required SharePoint columns linked in the release script.
- 6 Create a required SharePoint column with the same name.
- 7 Re-visit release setup.

This message occurs because each SharePoint column has a unique ID. When you delete and re-create a SharePoint column, a new ID is assigned to the column, which breaks the link between the column and the release script.

## Release Script May Transfer Out-of-Range Numeric Data

The Ascent Capture Values columns in the Document Settings tab will accept and transfer a number of any value. Please note that if an associated SharePoint column has a numeric range restriction, the release script will still transfer the number, even though it may be out of range.

## Limit on Length of SharePoint Column Names

SharePoint column names that exceed 179 characters will cause an "unexpected exception" error when you save the release script. To solve this problem, rename or hide the lengthy column.

## Release May Fail with Access Denied Error

The release may fail with the following error message even though permissions seem to be set correctly for the root destination:

“The user (<username>) does not have the required permission(s) to release a document to the specified destination (<root destination>). Please ask your system administrator to assign the appropriate permissions.”

This behavior occurs if the user does not have at least a Contribute permission level plus “Add and Customize Pages” permission for the following scenarios:

- The root destination's library does not exist in SharePoint
- The document name contains invalid characters

## Release May Fail with Missing Attributes Message

The release may fail with the following error message even though all required columns appear to have associated Ascent Capture values:

“One or more required attributes for this document are missing. Please verify that all Ascent Capture Values are correct and try again.”

This may be due to an unlinked (non-required) SharePoint column being reconfigured as a required column and then as a hidden column after release setup has been saved and published. To correct the problem, configure the column to be "Optional" before making it a hidden column.

## File Types Associated with Default Content Type

By default, SharePoint associates certain Microsoft file types to the default content type of the root destination's library, regardless of the content type selected during release setup. This occurs for the following eDocument file types:

- .doc - Microsoft Word
- .xls - Microsoft Excel
- .ppt - Microsoft PowerPoint
- .vsd - Microsoft Visio

In spite of this behavior, all the values are still released to their linked columns as configured.

If the default content type contains required columns that are not present in the content type selected in release setup, release fails with the following error:

“One or more required attributes for this document are missing. Please verify that all Ascent Capture Values are correct and try again.”

To resolve this problem, set the desired content type as the default content type for your SharePoint library.

## Any Value Can Be Released to a Choice Column

You can release any value to a Choice column, even if the value doesn't match any of the choice's elements and the column does not allow "fill-in" values. Even though the data is released, when you edit the document properties, the uploaded value is not available in the choice list for the column.

## URLs Containing Commas Are Ignored

When you upload a URL that contains commas to a SharePoint Hyperlink/Picture column, the URL is ignored.

## PDF and eDoc Combination Yields Blank Document

The release script produces a PDF containing blank pages if you do all of the following:

- On the Document Class Properties dialog box, on the PDF tab, do *not* select the “Skip first page of each document” check box
- In Release Setup, on the Image Settings tab, select “Kofax PDF” in the “Release Image As” field
- In Release Setup, on the General Settings tab, select the “Skip the first page of each document” check box
- During release, import only eDocs (do not scan or import any images)

Under these conditions, the release script releases a blank PDF file that contains as many pages as there are eDocs. For example, if you import three eDocs, it creates one PDF file with three blank pages.

## Invalid Folder Name Characters

SharePoint does not allow the following characters to be used in folder names:

- Ampersand (&)
- Asterisk (\*)
- Backslash (\)
- Colon (:)
- Forward Slash (/)
- Greater than sign (>)
- Left Bracket ({)
- Less than sign (<)
- Percent (%)
- Pipe (|)
- Pound Sign (#)
- Question mark (?)
- Quotation marks (“ ”)
- Right Bracket (})
- Tilde (~)

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**Note** A folder name can include a period, but cannot begin or end with a period and cannot contain consecutive periods.

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## Invalid Filename Characters

When the Ascent 7.5 Release Script for Microsoft Office SharePoint 2007 transfers files to the SharePoint server, and a file name contains invalid characters, the release script transfers the file,

but omits the invalid characters in the file name. The following characters are invalid for file names:

- Ampersand (&)
- Asterisk (\*)
- Backslash (\)
- Colon (:)
- Forward Slash (/)
- Greater than sign (>)
- Left Bracket ({)
- Less than sign (<)
- Percent (%)
- Pipe (|)
- Pound Sign (#)
- Question mark (?)
- Quotation marks (“ ”)
- Right Bracket (})
- Tilde (~)

## Multiple Lines of Strings

The Ascent 7.5 Release Script for Microsoft Office SharePoint 2007 currently only supports setting single line values to a SharePoint "Multiple lines of text" column type.

## Number Column Type and Scientific Notation

No value is set during release for any SharePoint column of type Number when you specify a value in scientific notation, such as 1.0e+20.

## Incorrect Release of Document with One Image and Multiple eDocs

Under the following conditions, the release script incorrectly allows a document containing eDocs to release without error:

- In Release Setup, on the Image Settings tab, select “Kofax PDF” in the “Release Image As” field
- In Release Setup, on the General Settings tab, select the “Skip the first page of each document” check box
- In the document, the first page is an image and the subsequent pages are one or more eDocs
- During batch processing, bypass the PDF Generator queue and release the document

This document should fail to release because the Ascent Capture has not generated any PDF images.

## Release May Succeed with Invalid Credentials

Under the following conditions, release successfully uploads documents to SharePoint even if a user's password is no longer valid:

- Release is running as a service.
- Release succeeds with valid credentials before the user's password is changed.
- The user's password is changed.

## Runtime Error Temporarily Displays When Closing the Administration Module

A runtime error may temporarily display when you perform the following operations:

- Open an existing release script in release setup.
- Make a change.
- Save and close the release script.
- Publish the batch class.
- Close the Administration module.

## SharePoint Versioning is Not Supported

The Ascent 7.5 Release Script for Microsoft SharePoint 2007 does not support SharePoint versioning. Therefore, whether SharePoint versioning is enabled or not, if the release script encounters a document that has the same file name as the document it is attempting to release, it creates a new name for that document in the following format:

```
[Document Name]-[Current DateTime in Ticks].[Extension]
```

Example:

```
MyDoc-633784168795269744.tif
```

## Kofax Technical Support

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

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

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

- Ascent Capture software version
- Microsoft Office SharePoint 2007 release script version
- Operating system and Service Pack version
- Network and client configuration
- Copies of your error log files
- Information about your release script

