

Oracle® Fusion Middleware

Administrator's Guide for Kofax Capture Export Connector to
Oracle UCM

11g Release 1 (11.1.1)

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Oracle Fusion Middleware Administrator's Guide for Kofax Capture Export Connector to Oracle UCM, 11g Release 1 (11.1.1)

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Contents

Preface	vii
Audience	vii
Documentation Accessibility	vii
Related Documents	viii
Conventions	viii
1 Introduction	
1.1 Product Overview	1-1
1.2 Software Requirements	1-1
1.2.1 Compatibility with Oracle Content Server	1-1
1.2.2 Compatibility with Kofax Capture	1-1
1.2.3 Compatibility with Adobe Acrobat Capture	1-2
2 Installation	
2.1 Installation Summary	2-1
2.2 Pre-Installation Tasks and Considerations	2-1
2.3 Installing Kofax Capture Export Connector	2-2
2.3.1 Instructions for an Update Installation	2-2
2.3.1.1 Delete Existing Release Script	2-2
2.3.1.2 Delete Existing Batch Class	2-3
2.3.1.3 Remove the Kofax Capture Export Connector	2-3
2.3.2 Instructions for a New Installation	2-4
2.4 Configuring Kofax Capture	2-5
2.4.1 Configuring Kofax Capture Client Systems	2-5
2.4.2 Configuring Kofax Capture Client to Use Kofax Capture Export Connector	2-5
2.4.2.1 Installing the Release Script	2-6
2.4.2.2 Importing Batch Classes	2-6
2.4.2.3 Assigning Release Script to Batch Classes	2-6
2.4.2.4 Publishing Batch Classes	2-7
2.4.3 Configuring Kofax Capture Export Connector in a Non-Default Directory	2-7
3 Using Kofax Capture with Kofax Capture Export Connector - Oracle UCM	
3.1 Working with Kofax Capture Batch Classes	3-1
3.1.1 Folders	3-2
3.1.2 Field Types	3-3

3.1.3	Setting Up Field Types.....	3-3
3.1.4	Document Classes.....	3-4
3.1.5	Setting Up Document Class Index Fields.....	3-4
3.1.6	Mapped Index Fields.....	3-5
3.1.6.1	ScannedDocsForOracleUCM.....	3-5
3.1.6.2	ScannedDocsForOracleUCMParam.....	3-5
3.1.7	Form Types.....	3-7
3.2	Customizing the Release Script.....	3-7
3.2.1	Accessing the Setup Dialogs.....	3-8
3.2.2	Using the Index Storage Tab.....	3-8
3.2.3	Setting Index Values.....	3-9
3.2.4	Using the Document Storage Tab.....	3-9
3.2.5	Using the Image Format Tab.....	3-9
3.2.6	Specifying PDF Settings.....	3-10
3.2.7	Setting File Type of Released Images.....	3-10
3.2.8	Selecting Multipage TIFF Output File Types.....	3-10
3.2.9	Selecting TIFF, JPG, or PCX Output File Types.....	3-10
3.2.10	Selecting Adobe Acrobat Capture PDF Output File Types.....	3-11
3.2.11	Specifying Adobe Acrobat Capture PDF Settings.....	3-11
3.2.12	Using the Server Tab.....	3-12
3.2.13	Setting URL, User Name, and Password.....	3-12
3.2.14	Setting Primary/Alternate File Formats.....	3-12
3.2.15	Setting Workflow Status.....	3-12
3.2.16	Setting Options for Adobe Acrobat Capture PDF Files With Errors.....	3-13
3.2.17	Accessing CHECKIN Parameters Editor.....	3-14
3.3	Mapping Kofax Index Fields to CHECKIN Parameters.....	3-14
3.3.1	Setting Up Mappings for Required Parameters.....	3-15
3.3.2	Setting Up Mappings for Optional Parameters.....	3-15
3.3.3	Setting Up Date and Time Parameters.....	3-16
3.3.4	Debugging Using LIDebug Parameter.....	3-17
3.4	Verifying Kofax Capture Installation.....	3-17
3.4.1	Create a Batch.....	3-17
3.4.2	Process Batch: Scan Queue.....	3-17
3.4.3	Process Batch: Validation Queue.....	3-18
3.4.4	Process Batch: Release Queue.....	3-18

A User Interface

A.1	Text Release Setup Page.....	A-1
A.2	Index Storage Tab.....	A-2
A.3	Document Storage Tab.....	A-3
A.4	Image Format Tab.....	A-4
A.5	Adobe Acrobat Capture Settings.....	A-4
A.6	Server Tab.....	A-8

B Using Adobe Acrobat Capture

B.1	Configuring Adobe Acrobat Capture.....	B-1
B.1.1	Creating a Watch Directory.....	B-1

B.1.2	Creating a Workflow	B-2
B.1.3	Creating a TIFF Workflow	B-2
B.1.4	Creating a JPG Workflow	B-3
B.2	Checking In Adobe Acrobat Capture PDF Files.....	B-4
B.2.1	Setting Up the Computer Running Adobe Acrobat Capture.....	B-4
B.2.2	Setting Up the Primary/Alternate File Formats	B-5
B.2.3	Setting Up the Image Files Release Directory.....	B-5

C Setting Global Options

C.1	About Global Options	C-1
C.2	Salvaging PDF Documents	C-1
C.3	Limiting the Error Check of the Adobe Acrobat Capture Log.....	C-3

Index

Preface

The Kofax Capture Export Connector component provides a link between Kofax Capture and Oracle Content Server. The integration is a custom release script that runs in Kofax Capture. The script takes the scanned images and index data processed in Kofax Capture and produces TIFF files that are checked directly into Oracle Content Server. Optionally, you can use Adobe Acrobat Capture to convert the TIFF files to PDF files.

Audience

This installation and user guide is intended for system administrators who need to install the Kofax Capture component. System administrators will also use this guide to configure Kofax index fields, Oracle Content Server check-in parameters, and output file settings. Instructions for using Adobe Acrobat Capture and setting global options are also provided. This guide assumes that the product has been installed correctly and that you are familiar with Oracle products in general the overall architecture of Oracle Content Server.

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Related Documents

For more information, refer to the administrator guides included in the Oracle Content Server documentation set and the documentation provided with the Kofax Capture product, as necessary.

Conventions

The following text conventions are used in this document:

Convention	Meaning
boldface	Boldface type indicates graphical user interface elements associated with an action, or terms defined in text or the glossary.
<i>italic</i>	Italic type indicates book titles, emphasis, or placeholder variables for which you supply particular values.
<code>monospace</code>	Monospace type indicates commands within a paragraph, URLs, code in examples, text that appears on the screen, or text that you enter.

Introduction

This section provides an introduction to the information in this guide. It covers the following topics:

- ["Product Overview"](#) on page 1-1
- ["Software Requirements"](#) on page 1-1

1.1 Product Overview

This installation and user guide is intended for system administrators who need to install the Kofax Capture component. System administrators will also use this guide to configure Kofax index fields, Oracle Content Server check-in parameters, and output file settings. Instructions for using Adobe Acrobat Capture and setting global options are also provided. This guide assumes that the product has been installed correctly and that you are familiar with Oracle products in general the overall architecture of Oracle Content Server.

1.2 Software Requirements

The information is subject to change as the product technology evolves and as hardware, operating systems, and third-party software programs are created, updated, or otherwise modified.

This section covers the following topics:

- ["Compatibility with Oracle Content Server"](#) on page 1-1
- ["Compatibility with Kofax Capture"](#) on page 1-1
- ["Compatibility with Adobe Acrobat Capture"](#) on page 1-2

1.2.1 Compatibility with Oracle Content Server

The Kofax Capture 11gR1 component is compatible with Oracle Content Server 11gR1.

1.2.2 Compatibility with Kofax Capture

The Kofax Capture Export Connector 11gR1 component is compatible with Kofax Ascent Capture 6.1, 7.0, and 8.0. Earlier versions of Kofax Ascent Capture are not supported. For a full list of Ascent Capture 6 limitations (including maximum number of pages in a batch, maximum number of zones on a page, and maximum sizes of zones) and additional application notes, please reference the applicable Kofax support site.

1.2.3 Compatibility with Adobe Acrobat Capture

The Kofax Capture Export Connector 11gR1 component is compatible with Adobe Acrobat Capture 3.0.

This section covers the following topics:

- ["Installation Summary"](#) on page 2-1
- ["Pre-Installation Tasks and Considerations"](#) on page 2-1
- ["Installing Kofax Capture Export Connector"](#) on page 2-2
- ["Configuring Kofax Capture"](#) on page 2-5

2.1 Installation Summary

The basic installation procedure consists of the following tasks:

- Installing Oracle Content Server. For installation information, refer to your Oracle Oracle Content Server installation documentation.
- Installing Kofax Capture as a standalone or server version. (The server version requires at least one client system.) For installation information, refer to your Kofax Capture documentation.
- Installing the Kofax Capture Export Connector component on the Kofax Capture standalone or server system. For more information, see ["Installing Kofax Capture Export Connector"](#) on page 2-2.
- (Optional) Installing and configuring Adobe Acrobat Capture. For installation and configuration information, refer to your Adobe Acrobat Capture documentation.
- Configuring Kofax Capture Export Connector for use with Kofax Capture (and optionally, with Acrobat Capture). For configuration and user information, see [Chapter 3, "Using Kofax Capture with Kofax Capture Export Connector - Oracle UCM"](#).

2.2 Pre-Installation Tasks and Considerations

Complete the following checklist before continuing:

- Specify a user and password to use to check all scanned documents into Oracle Content Server, taking into account the following scenarios:
 - **User has maximum access.**

If scanned documents will be checked into all areas of Oracle Content Server, then ensure that the user is a system administrator with Admin rights to all security groups.

- **User has minimal access.**

If scanned documents will be checked into a limited area of Oracle Content Server, then ensure that the user has Write access to the necessary security groups.
- **User must adjust Author content information field.**

If you want the person performing the scan to adjust the Author content information field to reflect the author of the document, then ensure that the user has Admin access to the necessary security groups.
- Record the user name and password. You will enter these names during the new installation procedure. See ["Instructions for a New Installation"](#) on page 2-4.
- Identify the server host name (or IP address) of the Oracle Content Server instance. The server name can be found on the Configuration Information page of the instance. You will enter this name during the new installation procedure. See ["Instructions for a New Installation"](#) on page 2-4.
- If you are installing Kofax Capture Export Connector for use with a proxied instance of Oracle Content Server, identify the relative web root from the Configuration Information page of the proxied instance. For example, `cs` (without forward slashes). You will enter this name, if necessary, during the new installation procedure. See ["Instructions for a New Installation"](#) on page 2-4.

2.3 Installing Kofax Capture Export Connector

This section includes step-by-step instructions for installing Kofax Capture Export Connector. The procedures for new and update installs are not the same. Please follow the install procedure that corresponds to your current configuration. This section covers the following topics:

- ["Instructions for an Update Installation"](#) on page 2-2
- ["Instructions for a New Installation"](#) on page 2-4

2.3.1 Instructions for an Update Installation

If you are upgrading from a previous version of the Kofax Capture Export Connector (or Ascent Capture, if an older version), you must perform these tasks before installing the new version:

- ["Delete Existing Release Script"](#) on page 2-2
- ["Delete Existing Batch Class"](#) on page 2-3
- ["Remove the Kofax Capture Export Connector"](#) on page 2-3

2.3.1.1 Delete Existing Release Script

In this procedure you unassign document classes and then delete the previous release script.

1. On the Windows taskbar, click the **Start** button, then select **Programs**, then select **Kofax Capture *version*** (or **Ascent Capture *version*** for older versions of Kofax), then select **Administration**.

The Kofax Capture Administration dialog is displayed.

2. In the Batch tab, expand the old batch class, right-click a document class, and select **Release Scripts**.

The Release Scripts dialog is displayed.

3. In the Assigned Release Scripts column, highlight the old Release Script name.
4. Click **Remove**.

A validation dialog is displayed.

5. Click **Yes**.

This disassociates the document class with the old release script.

6. Click **Close**.
7. Perform steps 2 through 6 for each document class.
8. Select **Tools**, then **Release Script Manager**.

The Release Script Manager dialog is displayed.

9. Highlight the old release script, and click **Remove**.
10. Click **Close**.

2.3.1.2 Delete Existing Batch Class

Use this procedure to remove the existing batch class.

Note: Before proceeding, it is recommended that you review and note any customizations that were done to the document classes in the batch class, and back up the existing batch class before deleting it.

1. In the Batch tab, right-click the existing batch class, and select **Delete**.
A confirmation dialog is displayed.
2. Click **Yes** to delete the batch class.
3. Exit Kofax Capture.

2.3.1.3 Remove the Kofax Capture Export Connector

Use this procedure to remove the Kofax Capture Export Connector:

1. On the Windows taskbar, click the **Start** button, then select **Settings**, then select **Control Panel**, then select **Add/Remove Programs**.
2. Select Kofax Capture Export Connector.
3. Click **Change/Remove**.

You are asked whether to completely remove the application.

4. Click **OK**.

Kofax Capture Export Connector files are removed, and a Maintenance Complete dialog is displayed.

5. Click **Finish**.
6. Close the Windows Add/Remove Programs dialog.

You may now proceed to "[Instructions for a New Installation](#)" on page 2-4.

2.3.2 Instructions for a New Installation

Use this procedure to install Kofax Capture Export Connector:

1. Close all other Windows programs.
2. From Windows Explorer, navigate to the Kofax Capture Export Connector executable, and run **setup.exe**.
The Welcome dialog is displayed.
3. Click **Next**.
The License Agreement dialog is displayed.
4. Read through the agreement, and click **Yes**.
The Set Kofax Capture Export Connector - Oracle UCM Parameter dialog is displayed.
5. Enter the username and password from "[Pre-Installation Tasks and Considerations](#)" on page 2-1, and click **Next**.
The Scanned Files Directory dialog is displayed.
6. Accept the default, and click **Next**. This is the directory in which your scanned files will be temporarily stored.
The Enter Text dialog is displayed.
7. Enter the server host name from "[Pre-Installation Tasks and Considerations](#)" on page 2-1, and click **Next**.
The Setup Type dialog is displayed.
8. Select the version of your Oracle Content Server and click **Next**.
The Setup Type dialog is displayed.
9. Select the type of Oracle Content Server (master or proxy) and click **Next**.
 - If you select a master instance, the Enter Text dialog is displayed. Skip step 10 and continue at step 11.
 - If you select a proxy instance, continue at step 10.
10. For a proxy server, select from the list of proxied instances, and click **Next**.

Note: If a list of proxied instances is not displayed, enter the Relative Web Root of the proxy server from "[Pre-Installation Tasks and Considerations](#)" on page 2-1, and click **Next**.

The Enter Text dialog is displayed.

11. Enter a web root, and click **Next**.
The Enter Text dialog is displayed.
12. Enter any changes to the URL, and click **Next**.

It is necessary to specify changes only in rare instances. (For example, if you are using a different cgi name or a web filter.) If you are unsure about whether you need to make a change, verify this information in your web server by examining the properties of your web site. The InstallShield Wizard Complete dialog is displayed.

13. Click **Finish**.

2.4 Configuring Kofax Capture

Use the following procedures to configure Kofax Capture for use with Kofax Capture Export Connector:

- If Kofax Capture Export Connector is installed on a Kofax Capture client system, copy files from the client system to the server system.
- Configure the Kofax Capture client system to use Kofax Capture Export Connector.
- If Kofax Capture Export Connector was not installed in the default directory, configure the image folder path in Kofax Capture.

This section covers the following topics:

- ["Configuring Kofax Capture Client Systems"](#) on page 2-5
- ["Configuring Kofax Capture Client to Use Kofax Capture Export Connector"](#) on page 2-5
- ["Configuring Kofax Capture Export Connector in a Non-Default Directory"](#) on page 2-7

2.4.1 Configuring Kofax Capture Client Systems

If you are installing Kofax Capture Export Connector on a Kofax Capture client system, certain Legacy files from the first Kofax Capture client system must be copied to the Kofax Capture server system.

Note: You do not need to perform these tasks for additional client systems. However, Kofax Capture must be installed on any other client systems that run the Administration module.

To configure your client Kofax Capture Export Connector instance:

1. From the client system, copy the StellentRel directory, located in `<Kofax install Dir>\Bin\`.
2. Paste this directory to the server system `\Ascent` directory. For example, `\\servername\shared directory name\Ascent\Bin\`.

2.4.2 Configuring Kofax Capture Client to Use Kofax Capture Export Connector

Configuring Kofax Capture to use Kofax Capture Export Connector involves the following tasks:

- ["Installing the Release Script"](#) on page 2-6
- ["Importing Batch Classes"](#) on page 2-6
- ["Assigning Release Script to Batch Classes"](#) on page 2-6
- ["Publishing Batch Classes"](#) on page 2-7

2.4.2.1 Installing the Release Script

1. On the Windows taskbar, click the **Start** button, then select **Programs**, then select **Kofax Capture** (or Ascent Capture *version* for older systems), then select **Administration**.

The Administration dialog is displayed.

2. Select **Tools** then **Release Script Manager**.

The Release Script Manager dialog is displayed.

3. Click **Add**.

The Open dialog is displayed.

4. From the StellentRel directory, select **StellentRel.inf**, and click **Open**.

The Add Release Scripts dialog is displayed.

5. Select **Kofax Capture Export Connector**, and click **Install**.

A dialog is displayed, specifying that registration is complete.

6. Click **OK**.

7. Click **Close** to close the Add Release Scripts dialog.

8. Click **Close** to close the Release Script Manager dialog.

2.4.2.2 Importing Batch Classes

After installing the release script, perform the following steps from the Kofax Capture Administration dialog.

1. Select **File**, then **Import**.

The Open dialog is displayed.

2. Select **OracleUCMBatch.cab**, and click **Open**.

Unpacking is performed.

3. Click **OK**.

The Import dialog is displayed, with `ScansForOracleUCM` and `ScansForOracleUCMParameters` listed as Available Batch Classes.

4. Click **Add All**.

5. In Transfer Mode box, select **Replace duplicates with items imported**.

6. Click **Import**.

The files are imported.

7. Click **OK** to close the Import/Export dialog.

`ScansForOracleUCM` and `ScansForOracleUCMParameters` are now displayed in the Batch tab on the Kofax Capture Administration dialog.

2.4.2.3 Assigning Release Script to Batch Classes

After importing the batches, perform the following steps from the Kofax Capture Administration dialog.

1. Expand the **ScansForOracleUCM** batch class, right-click **ScannedDocsForOracleUCM** document class, and select **Release Scripts**.

The Release Script dialog is displayed.

2. Select **Kofax Capture Export Connector - Oracle UCM *version***.
The Kofax Capture Export Connector - Oracle UCM Release Setup dialog is displayed.
3. Click **Add >>**.
Select the scripts.
4. Click **OK**.
5. Click **Close** to exit the Release Scripts dialog.
6. Expand the **ScansForOracleUCMParameters** batch class, right-click **ScannedDocsForOracleUCMParam** document class, and select **Release Scripts**.
The Release Scripts dialog is displayed.
7. Select **Kofax Capture Export Connector - Oracle UCM *version***.
The Kofax Capture Export Connector - Oracle UCM Release Setup dialog is displayed.
8. Click **Add >>**.
Select the scripts.
9. Click **OK**.
10. Click **Close** to exit the Release Scripts dialog.

2.4.2.4 Publishing Batch Classes

After adding the release script to batches, perform the following steps from the Kofax Capture Administration dialog.

1. Select **File** then **Publish**.
2. Click **Select All**.
3. Click **Publish**.
Validation and publishing should occur without warnings or errors.
4. Click **Close**.

The icons for the batch classes `ScansForOracleUCM` and `ScansForOracleUCMParameters` in the Batch tab on the Kofax Capture Administration dialog now display with check marks.

2.4.3 Configuring Kofax Capture Export Connector in a Non-Default Directory

Complete these steps only if you did not install Kofax Capture Export Connector into the default directory.

1. On the Windows taskbar, click the **Start** button, then select **Programs**, then **Kofax Capture *version***, then **Administration**.
The Kofax Capture Administration dialog is displayed.
2. In the Batch tab, highlight **ScansforOracleUCM**, and right-click **Properties**.
3. Adjust the path for the image folder to be your `Ascent\Images` directory.
4. In the Batch tab, highlight **ScansforOracleUCMParameters**, and right-click **Properties**.
5. Adjust the path for the image folder to be your `Ascent\Images` directory.

6. Complete the steps in the procedure for "[Publishing Batch Classes](#)" on page 2-7.

Using Kofax Capture with Kofax Capture Export Connector - Oracle UCM

This section covers the following topics:

- ["Working with Kofax Capture Batch Classes"](#) on page 3-1
- ["Customizing the Release Script"](#) on page 3-7
- ["Mapping Kofax Index Fields to CHECKIN Parameters"](#) on page 3-14
- ["Verifying Kofax Capture Installation"](#) on page 3-17

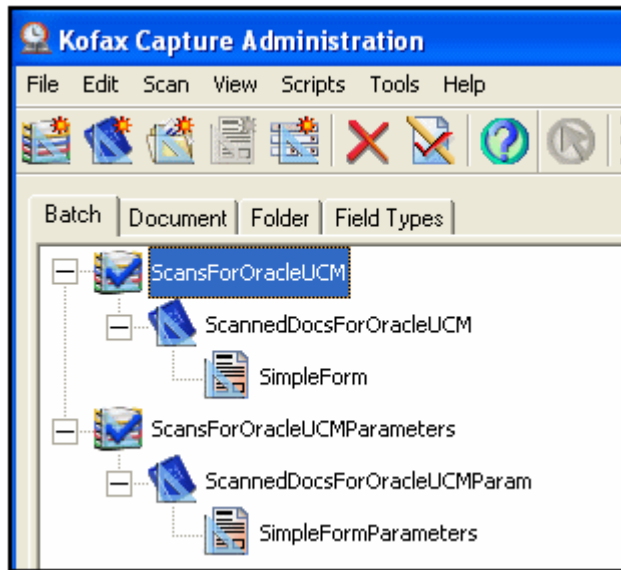
3.1 Working with Kofax Capture Batch Classes

After you have completed the installation and configuration tasks, your Kofax Capture workstation has two published batch classes: `ScannedDocsForOracleUCM` and `ScannedDocsForSOracleUCMParam`.

Both batch classes (shown in the figure below) are set up to support the standard required Oracle Content Server check-in parameters. In addition, the batch class `ScansForOracleUCMParameters` illustrates how a batch class can be configured for optional Oracle Content Server parameters, such as Release Date, Expiration Date, and so forth.

Like all Kofax Capture batch classes, these Oracle Content Server batch classes are constructed using field types, index fields, form types, and document classes, which are described in the following sections.

Note: For more information about batch classes, view the Kofax Capture online help.



This section covers the following topics:

- ["Folders"](#) on page 3-2
- ["Field Types"](#) on page 3-3
- ["Setting Up Field Types"](#) on page 3-3
- ["Document Classes"](#) on page 3-4
- ["Setting Up Document Class Index Fields"](#) on page 3-4
- ["Mapped Index Fields"](#) on page 3-5
- ["Form Types"](#) on page 3-7

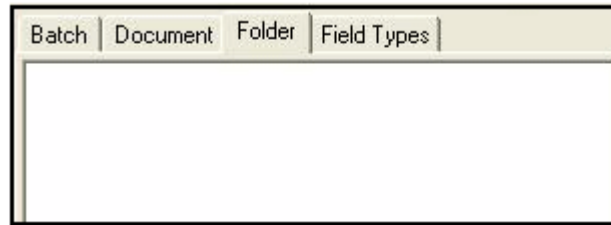
3.1.1 Folders

Folder classes define the properties of folders for a batch class. Batches are a collection of pages, documents, and folders that are organized into a hierarchy that you define. As with other elements of a batch class, you can create, edit, and delete folder classes.

In addition to organizing your documents within Kofax Capture, the real advantage to using folders comes after the documents have been released from Kofax Capture. If you ensure that the folder hierarchy in Kofax Capture matches (as closely as possible) the hierarchy used by your document management software, you can more easily import those documents into your third-party software.

Folders are created and filled with documents as the documents are processed through the Kofax Capture workflow. You can create folders manually (with batch editing), or you can allow them to be created automatically in accordance with rules you define. Likewise, you can place documents into folders manually or automatically.

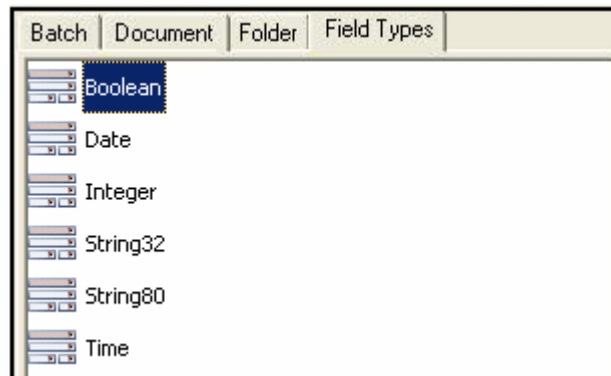
Pages can be added to documents, and documents can be added to folders. Folders can be added to other folders (nesting) up to 32,000 levels. However, loose pages cannot be added to a folder (although you may have loose pages at the root level of your batch, they must be placed into a document before they are added to a folder).



3.1.2 Field Types

Installing and configuring the Kofax Capture release script sets up specific Kofax Capture field types, which are shown in the figure below. These field types are in turn used to define index fields in the sample document classes:

ScannedDocsForOracleUCM and ScannedDocsForOracleUCMParm. When defining new index fields, you may use these field types, or create additional field types as needed. See ["Setting Up Field Types"](#) on page 3-3.



3.1.3 Setting Up Field Types

To set up field types:

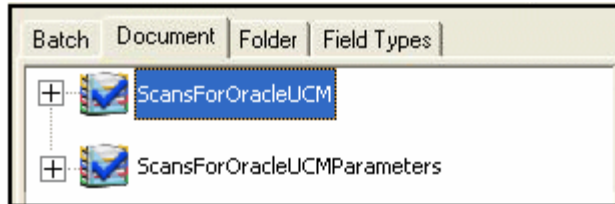
1. From **Kofax Capture**, open the **Administration** dialog, then select the Field Type tree view tab.
2. Right-click anywhere within the tab and select **New Field Type**.
The Create Field Type dialog is displayed.
3. Click **New**.
4. Enter values in the fields provided.
 - On the General tab, Name and Data type are required; Description and Dictionary are optional. For Data type, Kofax Capture supports 11 ODBC-compliant types.
 - On the Values tab, you have the option of entering known values for the field type and specifying settings for Force match and Case sensitive.
5. Click **OK** when complete.

Note: For more information about field types, view the Kofax Capture online help.

3.1.4 Document Classes

Installing and configuring the Kofax Capture release script as described in [Section 2.3, "Installing Kofax Capture Export Connector,"](#) and [Section 2.4, "Configuring Kofax Capture,"](#) sets up the following sample Kofax Capture document classes:

- ScansForOracleUCM
- ScansForOracleUCMPParameters



Each document class that is used with Kofax Capture includes the following:

- Index fields
- Attributes for the index fields
- At least one form type

Note: index fields that are defined for a document class are mapped to Oracle Content Server check-in parameters. See ["Mapping Kofax Index Fields to CHECKIN Parameters"](#) on page 3-14 for more information.

3.1.5 Setting Up Document Class Index Fields

Use the following procedure to set up document class index fields.

1. From **Kofax Capture**, open the **Administration** dialog, then select the Document tree view tab.
2. Right-click a document class and select **Properties**.

The Document Class Properties dialog is displayed. For examples of the dialogs for `ScannedDocsForOracleUCM` and `ScannedDocsForOracleUCMPParam`, see ["ScannedDocsForOracleUCM"](#) on page 3-5 and ["ScannedDocsForOracleUCMPParam"](#) on page 3-5.

3. Click **New**.
4. Enter the following information:

- **Name**
Enter a descriptive name.
- **Field Type**
Select the appropriate field type from the drop-down list.
- **Default**
If desired, enter a default value to populate the index field.

Tech Tip: If the corresponding Oracle Content Server metadata field is required, entering a default value is recommended. Check-in will fail if a required metadata field does not contain a value.

- **Required**
Select **True** if the field must contain a value during validation.
Tech Tip: If the corresponding Oracle Content Server metadata field is required, set this field to True.
 - **Verify**
Set to **False**.
 - **Hidden**
Set to **False**.
 - **Sticky**
Set to **False**.
 - **Total**
Set to **False**.
5. When you are done adding the index field, click **Apply** to continue or **OK** to exit.

3.1.6 Mapped Index Fields

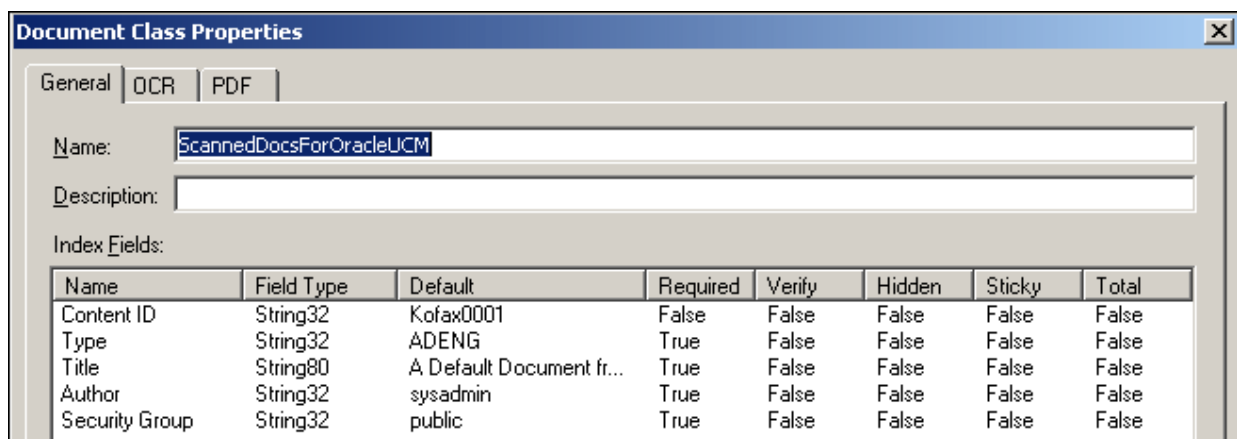
This section covers the following topics:

- ["ScannedDocsForOracleUCM"](#) on page 3-5
- ["ScannedDocsForOracleUCMPParam"](#) on page 3-5

3.1.6.1 ScannedDocsForOracleUCM

The `ScannedDocsForOracleUCM` document class includes "core" index fields that are mapped to Oracle Content Server standard required CHECKIN parameters.

Figure 3–1 Mapped Index Fields for `ScannedDocsForOracleUCM` Document Class

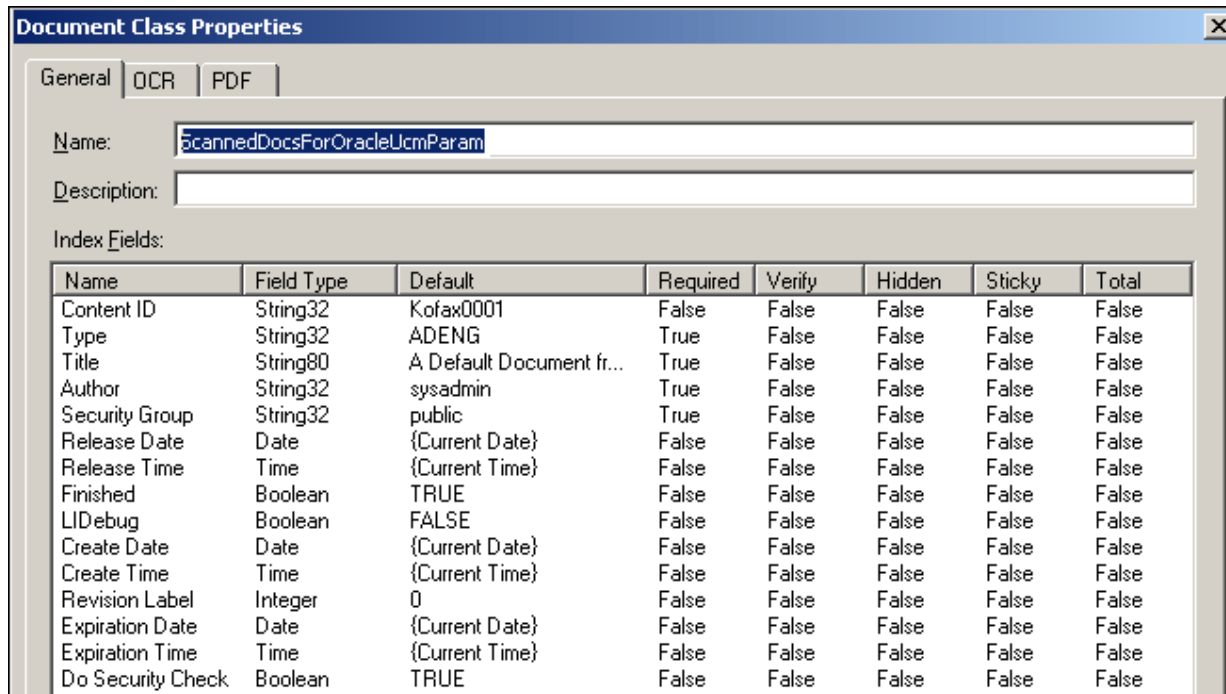


Name	Field Type	Default	Required	Verify	Hidden	Sticky	Total
Content ID	String32	Kofax0001	False	False	False	False	False
Type	String32	ADENG	True	False	False	False	False
Title	String80	A Default Document fr...	True	False	False	False	False
Author	String32	sysadmin	True	False	False	False	False
Security Group	String32	public	True	False	False	False	False

3.1.6.2 ScannedDocsForOracleUCMPParam

The `ScannedDocsForOracleUCMPParam` document class includes "core" index fields that are mapped to Oracle Content Server standard required check-in parameters, plus additional "example" index fields that could be mapped to Oracle Content Server optional check-in parameters using the CHECKIN Parameters Editor (see ["Accessing CHECKIN Parameters Editor"](#) on page 3-14).

Figure 3–2 Mapped Index Fields for ScannedDocsForOracleUCMParam Document Class



Each of the Oracle Content Server document classes is configured with the index fields listed in the table below. The index fields that are defined for both document classes (Content ID, Type, Title, Author, and Security Group) are mapped to Oracle Content Server parameters that are required for successful check-in of documents to Oracle Content Server.

The additional index fields defined for ScannedDocsForOracleUCMParam are provided in the document class for illustration purposes only. They are examples of index fields that might hypothetically be mapped to Oracle Content Server parameters using the CHECKIN Parameters Editor.

ScannedDocsForOracleUCM Index Fields	ScannedDocsForOracleUCMParam Index Fields
Content ID	Content ID
Type	Type
Title	Title
Author	Author
Security Group	Security Group
N/A	Release Date
N/A	Release Time
N/A	Finished
N/A	LIDebug
N/A	Create Date
N/A	Create Time
N/A	Revision Label
N/A	Expiration Date

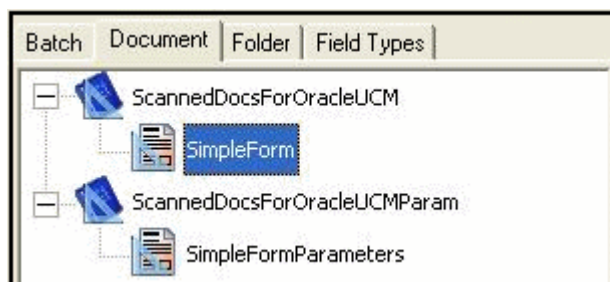
ScannedDocsForOracleUCM Index Fields	ScannedDocsForOracleUCMPParam Index Fields
N/A	Expiration Time
N/A	Do Security Check

3.1.7 Form Types

Installing and configuring the Kofax Capture release script as described in chapters 1 and 2 sets up the two sample document classes with the form types shown in the figure below.

The form types (SimpleForm and SimpleFormParameters) are provided for the Oracle Content Server document classes because at least one form type must be defined for a document class. Since a form type defines a unique form, you will set up your own form types to meet the needs of your specific application.

Note: For more information about form types, view the Kofax Capture online help.



3.2 Customizing the Release Script

This section covers the following topics:

- ["Accessing the Setup Dialogs"](#) on page 3-8
- ["Using the Index Storage Tab"](#) on page 3-8
- ["Setting Index Values"](#) on page 3-9
- ["Using the Document Storage Tab"](#) on page 3-9
- ["Using the Image Format Tab"](#) on page 3-9
- ["Specifying PDF Settings"](#) on page 3-10
- ["Setting File Type of Released Images"](#) on page 3-10
- ["Selecting Multipage TIFF Output File Types"](#) on page 3-10
- ["Selecting TIFF, JPG, or PCX Output File Types"](#) on page 3-10
- ["Selecting Adobe Acrobat Capture PDF Output File Types"](#) on page 3-11
- ["Specifying Adobe Acrobat Capture PDF Settings"](#) on page 3-11
- ["Using the Server Tab"](#) on page 3-12
- ["Setting URL, User Name, and Password"](#) on page 3-12
- ["Setting Primary/Alternate File Formats"](#) on page 3-12

- ["Setting Workflow Status"](#) on page 3-12
- ["Setting Options for Adobe Acrobat Capture PDF Files With Errors"](#) on page 3-13
- ["Accessing CHECKIN Parameters Editor"](#) on page 3-14

3.2.1 Accessing the Setup Dialogs

Use the following procedure to access the setup dialogs for the Kofax Capture release script.

1. From **Kofax Capture**, open the **Administration** dialog, then select the Document tree view tab.
2. Expand a Oracle Content Server batch class, right-click its document class, and select **Release Scripts**.

The Release Script dialog is displayed.

3. In the list of Assigned Release Scripts, highlight **Kofax Capture Export Connector - Oracle UCM *version***, and click **Setup**.

The Text Release Setup dialog is displayed. This dialog has the following tabs :

- [Index Storage Tab](#)
Used for index value settings.
- [Document Storage Tab](#)
Used for release directory and Acrobat Capture settings.
- [Image Format Tab](#)
Used for releases images as file type settings.
- [Server Tab](#)
Used for Oracle Content Server settings.

3.2.2 Using the Index Storage Tab

Use the Index Storage tab to set index values for the batch class. The Kofax Capture release script establishes assignments for the required information field items found in an initial Oracle Content Server installation. The values assigned to the index fields are supplied from the Validation module during Kofax Capture batch processing.

Note: You must add index fields to a document class before they are available to assign as index values in a customized release script. See ["Setting Up Document Class Index Fields"](#) on page 3-4. By default, all index fields currently defined for the selected document class will be in the list of index values.

Note: For more detailed information about this tab, see ["Index Storage Tab"](#) on page A-2.

3.2.3 Setting Index Values

To set up index values:

1. Add the desired Index Field to document class properties. See "[Setting Up Document Class Index Fields](#)" on page 3-4 or "[Mapped Index Fields](#)" on page 3-5.
2. Navigate to the Index Storage tab of the Oracle Content Server Release Setup dialog.
3. Click **Add**.
A blank index value is added to the end of the list of existing index values.
4. Click the context menu button to the right of the blank index value.
5. From the **Index Fields** menu option, select an index field.
6. Click **Apply** to continue or **OK** to exit the dialog.

Note: When selecting index values, do not choose Kofax Capture Values or Text Constant.

Note: If you want an index value to map to a Oracle Content Server optional check-in parameter, you must use the CHECKIN Parameter Editor to create the mapping. However, the following standard check-in parameters do not need to be mapped, because they are assigned automatically:

- Content ID
 - Type
 - Title
 - Author
 - Security Group
 - Account (if enabled in Oracle Content Server)
-
-

3.2.4 Using the Document Storage Tab

Use the Document Storage tab to view or change the directory paths for released files and to set how Kofax Capture monitors the Acrobat Capture PDF conversion process.

Note: For more detailed information about this tab, see "[Document Storage Tab](#)" on page A-3.

3.2.5 Using the Image Format Tab

Use the Image Format tab to set the format (file type) of released images.

Note: For more detailed information about this tab, see "[Image Format Tab](#)" on page A-4.

3.2.6 Specifying PDF Settings

Use the Settings button to open the Adobe Acrobat Capture Settings dialog box where you can specify PDF settings.

Note: For more detailed information about this tab, see "[Adobe Acrobat Capture Settings](#)" on page A-4.

3.2.7 Setting File Type of Released Images

Kofax Capture supports releasing scanned images in a number of output file formats. The following image files are supported when using Kofax Capture:

- JPG - JPG Compression
- Multipage TIFF - CCITT Group 3
- Multipage TIFF - CCITT Group 3/2D
- Multipage TIFF - CCITT Group 4
- Multipage TIFF - JPEG Compression
- Multipage TIFF - Uncompressed
- PCX - PackBytes
- Adobe Acrobat Capture PDF (from JPEG)
- Adobe Acrobat Capture PDF (from Multipage TIFF)
- Adobe Acrobat Capture PDF (from PCX)
- Adobe Acrobat Capture PDF (from Single Page TIFF)
- TIFF - CCITT Group 3
- TIFF - CCITT Group 3/2D
- TIFF - CCITT Group 4
- TIFF - JPEG Compression
- TIFF - Uncompressed

3.2.8 Selecting Multipage TIFF Output File Types

Select a Multipage TIFF output file type when you have more than one TIFF image in a batch, and you would like to have all of those images bundled together and checked into the Oracle Content Server as one content item.

1. Navigate to the Image Format tab on the Oracle Content Server Release Setup dialog.
2. In the **Release Images As Image file type** drop-down list, click a Multipage TIFF Output File Type.

3.2.9 Selecting TIFF, JPG, or PCX Output File Types

Select a TIFF, JPG or PCX output file type if you want to check a file in one of those formats into Oracle Content Server as both the primary (native) and alternate (web viewable) file.

When you select TIFF, JPG or PCX, the first graphic in each batch is checked into Oracle Content Server. Because of this, you may want to use Multipage TIFF (see ["Selecting Multipage TIFF Output File Types"](#) on page 3-10) if you have more than one graphic in a batch. Alternatively, you could ensure that each batch contains only one graphic.

1. Navigate to the Image Format tab on the Oracle Content Server Release Setup dialog.
2. In the **Release Images As Image file type** drop-down list, click a TIFF, JPG or PCX Output File Type.

3.2.10 Selecting Adobe Acrobat Capture PDF Output File Types

Select Adobe Acrobat Capture PDF as the output file type if you want to check a PDF file into Oracle Content Server as the primary (native) or alternate (web viewable) file.

Note: Selecting Adobe Acrobat Capture PDF as the output file type requires the use of Adobe Acrobat Capture. Before continuing with the following procedure, read through and complete ["Configuring Adobe Acrobat Capture"](#) on page B-1.

1. Navigate to the Image Format tab on the Oracle Content Server Release Setup dialog.
2. In the Release Images As Image file type drop-down list, click **Adobe Acrobat PDF (from Multipage TIFF)**.

The Settings button becomes available.

3.2.11 Specifying Adobe Acrobat Capture PDF Settings

When you choose to release images as Adobe Acrobat Capture PDF (from Multipage TIFF), you then use Settings button to specify Adobe Acrobat Capture workgroup hub, watched folder, workflow, and other settings.

1. On the Image Format tab of the Oracle Content Server Release Setup dialog, click **Settings**.

Note: The **Adobe Acrobat Capture PDF (from Multipage TIFF)** setting will work with both single page and multiple-page TIFF files.

2. Select the location of the Adobe Acrobat Capture workgroup hub:
 - a. Click the browse button next to the Workgroup Hub field.
 - b. Navigate to the location of the Hub directory. For example:
mapped drive/Program Files/Adobe/Adobe Acrobat Capture 3.0/Hub
 - c. Click **OK**.

Upon selection of a workgroup hub, the Dictionaries and Workflows drop-down lists will be populated with available options.

3. Select the location of the Adobe Acrobat Capture Watched Folder:
 - a. Click the browse button next to the Watched Folder field.

- b. Navigate to the location of the Watch directory. For example:
 mapped drive/Program Files/Adobe/Adobe Acrobat Capture 3.0/Watch
- c. Click **OK**.
- 4. Select **Formatted Text & Graphics** from **Page Content** drop-down list.
- 5. If desired, select options for Language, PDF Document Settings, and Dictionaries.
- 6. Select **StellentScans** from **Workflows** drop-down list.
- 7. If desired, select options for Suspect Regions and Advanced Settings.
- 8. Click **OK**.

3.2.12 Using the Server Tab

The Server tab on the Oracle Content Server Release Setup dialog is used to specify settings for Oracle Content Server URL, user name, and password; to select options for workflow and primary/alternate file check in formats; and to access the CHECKIN parameters editor.

3.2.13 Setting URL, User Name, and Password

These settings were made during installation of Kofax Capture and may be changed using the fields provided on the Server tab if necessary.

3.2.14 Setting Primary/Alternate File Formats

Kofax Capture lets you control how your released files (as specified on the Document Storage Tab) are checked into Oracle Content Server.

There are two drop-down menus available—one for the primary file and one for the alternate file. Within each menu, you can choose: Image, Kofax PDF, Adobe Acrobat Capture PDF, or OCR full text. The Alternate file menu also includes a [None] option in case you do not want to check in an alternate file.

You can use the menus to, for example, select Image at the primary (native) file and Adobe Acrobat Capture PDF as the alternate (web-viewable) file.

Note: Oracle Content Server will not allow two files with the same file extension (such as .pdf) to be both the primary and alternate file.

Note: For information on using Adobe Acrobat Capture and checking in Adobe Acrobat Capture PDFs, see [Appendix B, "Using Adobe Acrobat Capture"](#).

3.2.15 Setting Workflow Status

The Kofax Capture release script enables you to initiate an existing workflow in Oracle Content Server when an item is released from Kofax Capture.

Note: The workflow setting on this dialog refers to a Oracle Content Server workflow, not an Adobe Acrobat Capture workflow.

Note: An active workflow must exist in Oracle Content Server before an item released from Kofax Capture can enter it.

1. Navigate to the Server tab on the Oracle Content Server Release Setup dialog.
2. Set the workflows status using the **Allow Workflows** check box.
 - Select the check box to enable initiation of workflows when content items are released from Kofax and checked into Oracle Content Server.
 - Clear the check box to disable initiation of workflows when content items are released from Kofax and checked into Oracle Content Server.

Note: The Kofax Capture release script will initiate check in of a content item revision if the user specifies an existing content ID on the Validation dialog.

- If the Allow Workflows check box is not selected, the revision will be checked in unconditionally.
- If the Allow Workflows check box is selected, the content item identified by the user (on the Validation dialog) must be checked out of Oracle Content Server before Kofax Capture initiates check in. If the content item is not checked out, the check in will fail with an error message.

3.2.16 Setting Options for Adobe Acrobat Capture PDF Files With Errors

When an Adobe Acrobat Capture PDF file contains an error, you can stop it from being checked into Oracle Content Server so you can review it.

With the "Check In Adobe Acrobat Capture PDF with Errors" option, you can allow the check in of a PDF generated by Adobe Acrobat Capture that has any errors in the Adobe Acrobat Capture finished document log. In addition, you can choose to keep the PDF file, so it remains in the release directory where you can review it.

To set PDF error options:

1. Navigate to the Server tab on the Oracle Content Server Release Setup dialog.
2. Choose the PDF error checking option:
 - Leave the **Check In Adobe Acrobat Capture PDF with Errors** option unchecked to ensure that all PDF files containing errors are not checked into Oracle Content Server.
 - Check the **Check In Adobe Acrobat Capture PDF with Errors** option to check all PDF files into Oracle Content Server, even if they contain errors.
3. Determine if the files with errors remain or are deleted:
 - To keep the PDF files with errors in the release directory, select the **Keep primary and alternate files in the release directory when the check in fails** option, which is selected by default.
 - To delete PDF files with errors from the release directory, clear the **Keep primary and alternate files in the release directory when the check in fails** option.

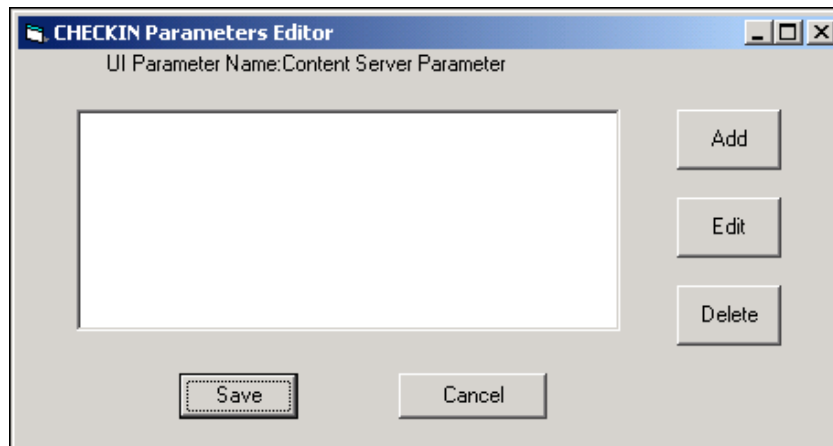
You may also want to use the Salvage PDF documents option, described [Appendix C, "Setting Global Options"](#).

3.2.17 Accessing CHECKIN Parameters Editor

When you want to map Kofax Capture index fields to Oracle Content Server CHECKIN parameters, you use the CHECKIN Parameters Editor, which is accessed using the following procedure.

1. Navigate to the Server tab on the Oracle Content Server Release Setup dialog.
2. Click the **CHECKIN Service Parameters** button.

The CHECKIN Parameters Editor dialog is displayed.



Note: For information on how to create mappings, see ["Mapping Kofax Index Fields to CHECKIN Parameters"](#) on page 3-14.

3.3 Mapping Kofax Index Fields to CHECKIN Parameters

When a Kofax Capture release script is used to check documents into Oracle Content Server, one of two Oracle Content Server IdcCommand services is used:

- The CHECKIN_ARCHIVE service is used if the Allow Workflows check box is selected on the Server tab of the Oracle Content Server Release Setup dialog. See ["Setting Workflow Status"](#) on page 3-12.
- The CHECKIN_UNIVERSAL service is used if the Allow Workflows check box is not selected on the Server tab of the Oracle Content Server Release Setup dialog. See ["Setting Workflow Status"](#) on page 3-12.

Each CHECKIN service specifies certain required parameters to successfully execute the content item check-in process. Other parameters may be specified but are not required.

Note: For more information on Oracle Content Server CHECKIN services and parameters, see the IdcCommand for Java Command Utility Reference Guide.

This section covers the following topics:

- ["Setting Up Mappings for Required Parameters"](#) on page 3-15
- ["Setting Up Mappings for Optional Parameters"](#) on page 3-15
- ["Setting Up Date and Time Parameters"](#) on page 3-16
- ["Debugging Using LIDebug Parameter"](#) on page 3-17

3.3.1 Setting Up Mappings for Required Parameters

When using Kofax Capture, it is necessary for Kofax Capture to have, at a minimum, index fields that correspond to the content information (metadata) fields that Oracle Content Server requires for content item check in. The following list of index fields must exist in the Kofax document class or the batch class.

- Content ID (unless auto-generation of Content IDs is enabled in Oracle Content Server)
- Type
- Title
- Author
- Security Group
- Account (if security accounts are enabled)

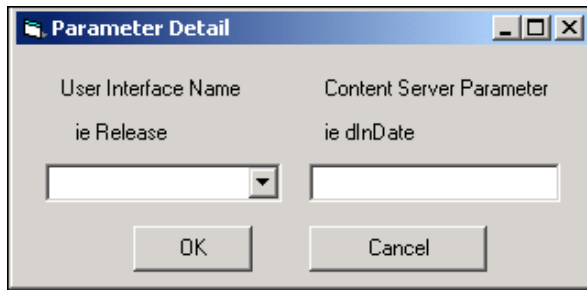
Note: Index fields must be named exactly as they are shown in the list above, so that the release script can recognize them as required fields and correctly format them for Oracle Content Server.

3.3.2 Setting Up Mappings for Optional Parameters

If you want to specify other check-in parameters, for example, release date, expiration date, and so forth, use the following procedure.

Note: You should have a solid understanding of Oracle Content Server CHECKIN services and parameters before proceeding to set up mappings. Invalid parameters will cause a batch to fail during release/check-in.

1. Set up index fields for the desired parameters. See ["Setting Up Document Class Index Fields"](#) on page 3-4.
2. Set up index values for the Kofax Capture release script. See ["Setting Index Values"](#) on page 3-9.
3. Open the CHECKIN Parameters Editor. See ["Accessing CHECKIN Parameters Editor"](#) on page 3-14.
4. On the CHECKIN Parameters Editor dialog, click **Add**.
The Parameter Detail dialog is displayed.



5. From the User Interface Name drop-down list, select the desired index field.
6. In the Oracle Content Server Parameter field, enter the name of the parameter.

Note: Pay close attention to spelling and syntax when entering the parameter.

7. Click **OK**.
The mapping will be displayed in the CHECKIN Parameters Editor list.
8. Add, edit, or delete mappings as desired.
9. When you are finished, click **Save** to exit and save your changes, or click **Cancel** to exit without saving your changes.
10. Click **Yes** to confirm the action.
11. Click **OK** to exit the Oracle Content Server Release Setup dialog.
12. Click **Close** to exit the Release Scripts dialog.
13. Publish the batch class so that your changes are in effect when you next use the batch class to import or scan documents.

3.3.3 Setting Up Date and Time Parameters

Oracle Content Server date fields include both the date and the time in one field. Kofax Capture uses separate fields for date and time. Use the following procedure to concatenate date and time into a single check-in parameter.

1. Set up an index field for the date field (for example, Release Date). Be sure to use the *Date* field type when defining the index field.
2. Set up an index field for the time field (for example, Release Time). Be sure to use the *Time* field type when defining the index field.
3. Use the CHECKIN Parameters Editor to map the *date* index field to the desired Oracle Content Server check-in parameter. For example, map Release Date to dInDate.
4. Use the CHECKIN Parameters Editor to map the *time* index field to the same Oracle Content Server check-in parameter. For example, map Release Time to dInDate.

3.3.4 Debugging Using LIDebug Parameter

If a mapping LIDebug:LIDebug is created, and if the value is set to TRUE during the validation step, the .hda data that is passed from Kofax Capture to Oracle Content Server will be displayed when the release script is run. This allows the user to verify that the correct data and parameters are being passed to the Oracle Content Server.

3.4 Verifying Kofax Capture Installation

Perform the following tasks to verify that Kofax Capture is installed and configured correctly.

- ["Create a Batch"](#) on page 3-17
- ["Process Batch: Scan Queue"](#) on page 3-17
- ["Process Batch: Validation Queue"](#) on page 3-18
- ["Process Batch: Release Queue"](#) on page 3-18

Note: Before proceeding, make sure that Oracle Content Server is running and that the Kofax dongle (hardware key) is in place.

3.4.1 Create a Batch

To create a batch:

1. On the Windows taskbar, click the **Start** button, then select **Programs**, then **Kofax Capture**, then **Batch Manager**.
2. Select **File** then **New Batch**.
3. In Batch class drop-down list, select **ScansForOracleUCM**.
4. Click **Save**.
5. Click **Close**.

The new batch is displayed in the Batch Manager main dialog. The batch should be at the "Scan" queue and should show a "Ready" status.

3.4.2 Process Batch: Scan Queue

After creating the batch, perform the following steps from the Kofax Capture Batch Manager main dialog.

1. Select **File** then **Process Batch**.
The Scan module is displayed.
2. Select **Software Import** from the drop-down list.
3. Select **Scan** then **Start**.
The Import dialog is displayed.
4. Select a sample TIFF file, and click **Open**.
A TIFF image is added to the batch contents.
5. Select **Batch** then **Close**.
6. Click **Yes** to confirm the action.

In the Batch Manager main dialog, the batch should be at the Validation queue and should show a "Ready" status.

3.4.3 Process Batch: Validation Queue

After running the scan queue, perform the following steps from the Kofax Capture Batch Manager dialog.

1. Select **File** then **Process Batch**.

The Validation module is displayed.

2. Enter the required Oracle Content Server Field Info values.

Specify a Content ID if necessary, based on this information:

- **Use the default batch with the default Content ID:** The content will be checked in with a unique suffix added to the Content ID *Kofax0001*.
- **Do not specify a Content ID** (you can remove the default Content ID by changing the batch or by deleting the Content ID in the validation step): If Oracle Content Server is configured to automatically assign a Content ID, the content is checked in with this automatic ID. If Oracle Content Server is not configured to assign a Content ID, an error message is displayed during the release process.
- **Specify a Content ID:** The content is checked into Oracle Content Server with the specified Content ID and without a unique suffix added. If a content item with the same Content ID is already checked in, the new document is checked in as a new revision of the existing content item.

3. Select **Batch** then **Close**.

4. If prompted, click **Yes** to save data before closing document.

In the Batch Manager main dialog, the batch should be at the Release queue and should show a Ready status.

3.4.4 Process Batch: Release Queue

After running the validation queue, perform the following steps from the Kofax Capture Batch Manager dialog.

1. Select **File** then **Process Batch**.

If the release queue runs without error, the TIFF image is checked into Oracle Content Server.

If the release queue results in errors, check the error messages.

2. You may exit the Batch Manager module.

User Interface

This section provides information about the user interface screens and covers the following topics:

- "Text Release Setup Page" on page A-1
- "Index Storage Tab" on page A-2
- "Document Storage Tab" on page A-3
- "Image Format Tab" on page A-4
- "Adobe Acrobat Capture Settings" on page A-4
- "Server Tab" on page A-8

A.1 Text Release Setup Page

Use this page to access the setup dialogs for the Kofax Capture release script.

Element	Description
Batch class	The name of this batch class. A batch class describes how the documents in a batch will be processed. A batch class contains one or more document classes, which in turn contain one or more form types. This allows you to have different kinds of documents and forms within one batch.
Document class	The name of this document class. A document class is a definition of a particular type of document, such as an order form or medical form. Document classes provide a convenient mechanism for associating the same group of index fields and processing settings with multiple form types. You can define a document class, and then add one or more form types to it. Then, you can associate a set of index fields and processing settings with the document class. The same set of fields and settings will be shared across all the form types defined for the document class.
Name	The name for this release script.

Element	Description
Index Storage tab	Displays the "Index Storage Tab" on page A-2.
Document Storage tab	Displays the "Document Storage Tab" on page A-3.
Image Format tab	Displays the "Image Format Tab" on page A-4.
Server tab	Displays the "Server Tab" on page A-8.
OK button	Saves the current settings.
Cancel button	Closes the page without saving the current settings.
Apply button	Applies and saves the current settings.
Help button	Opens the applicable context-sensitive help screen.

A.2 Index Storage Tab

Use the Index Storage tab to set index values for the batch class. The Kofax Capture release script establishes assignments for the required information field items found in an initial Oracle Content Server installation. The values assigned to the index fields are supplied from the Validation module during Kofax Capture batch processing.

Note: You must add index fields to a document class before they are available to assign as index values in a customized release script. By default, all index fields currently defined for the selected document class will be in the list of index values.

Batch class: ScansForOracleUCM
 Document class: ScannedDocsForOracleUCM
 Name:

Index Storage | Document Storage | Image Format | Server

Index Values

Sequence	Index Value
1	Content ID
2	Type
3	Title
4	Author
5	Security Group

Add
 Delete
 Delete All
 Move

OK Cancel Apply Help

Element	Description
Sequence number	Use the sequence position to establish the priority for the specified index values.

Element	Description
Index Value	The Content Server metadata parameters used for index values associated with the new file checkin.
Add button	Opens a dialog to add a new metadata parameter as an index value.
Delete button	Removes a selected index value from the list.
Delete All button	Removes all of the listed index values.
Up / Down buttons	Used to adjust the specific placement order of the selected entry in the index values list. The position of each entry in the list is relevant to its priority for batch processing. The higher an entry is positioned in the list, the higher its priority is in the processing. Each click on the up or down arrow moves the selected entry up or down one position in the list.

A.3 Document Storage Tab

Use the Document Storage tab to view or change the directory paths for released files and to set how Kofax Capture monitors the Acrobat Capture PDF conversion process.

Batch class: ScansForOracleUCM
Document class: ScannedDocsForOracleUCM
Name:

Index Storage | Document Storage | Image Format | Server

Image Files
 Release image files
Release directory: Browse...
 Skip first page of each document

OCR Full Text Files
 Release OCR full text files
Release directory: Browse...

Kofax PDF Files
 Release Kofax PDF files
Release directory: Browse...

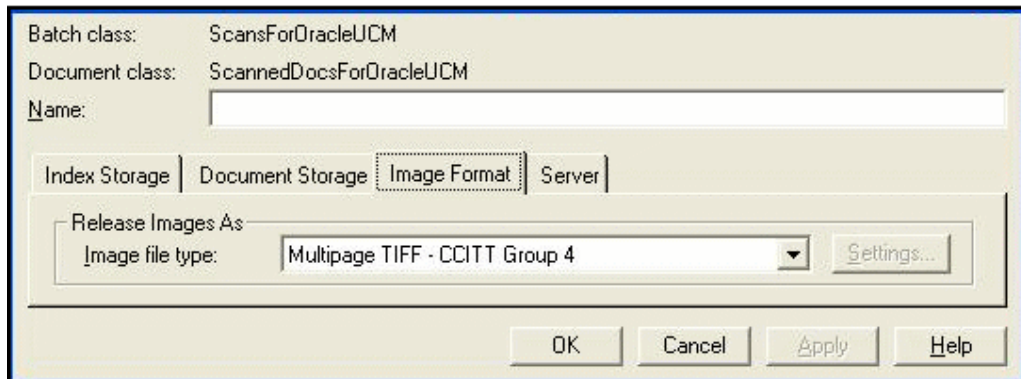
OK Cancel Apply Help

Element	Description
Release image files	Select this check box if you want to release your image files.
Release directory	Enter the path to the folder to which you want to release the files. If desired, you can use the Browse button. Note: The path to the Image Files release directory must not exceed 122 characters.

Element	Description
Skip first page of each document	Select this check box if you do not want the first page of your documents released. For example, you might want to check this option if you are using separator sheets to separate the documents in your batches and do not want to release the separator sheets. Note: If you are not using separator sheets, checking this option will cause the first page of each document to be skipped (not released).
Release OCR full text files	Select this check box if your want to release your OCR full text files.
Release directory	Enter the path to the folder to which you want to release the files. If desired, you can use the Browse button. Note: The path to the OCR full text files release directory must not exceed 122 characters.
Release Kofax PDF files	Select this check box to release Kofax PDF files.
Release directory	Enter the path to the folder to which you want to release the files. If desired, you can use the Browse button. Note: The path to the Kofax PDF files release directory must not exceed 122 characters.

A.4 Image Format Tab

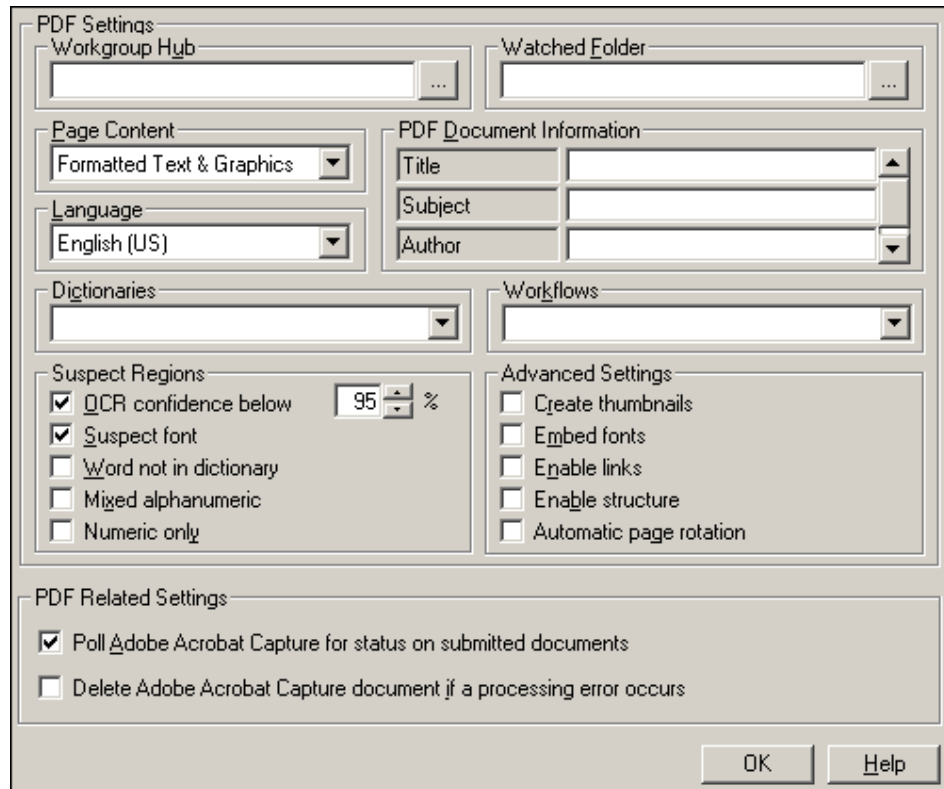
Use the Image Format tab to set the format (file type) of released images.



Element	Description
Image file type	Provides a list of file types to use to check documents into Content Server.
Settings	Displays the " Adobe Acrobat Capture Settings " on page A-4.

A.5 Adobe Acrobat Capture Settings

Use the Settings button to open the Adobe Acrobat Capture Settings dialog box where you can specify PDF settings.



Element	Description
Workgroup Hub	Select the location of your Adobe Acrobat Capture workgroup hub by using the Browse button. The workgroup hub is a folder on a drive accessible to all stations off the workgroup. Each workstation in the group needs read and write access to the hub folder to operate. The workgroup hub property is required by Adobe Acrobat Capture. Upon selection of a workgroup hub, the Dictionaries and Workflow's properties will be populated with default values.
Watched Folder	Select the location of your Adobe Acrobat Capture watched folder by using the Browse button. This is where your files and images will be temporarily copied for PDF processing. The watched folder property is required by Adobe Acrobat Capture and is used to submit your files to the Adobe Acrobat Capture workflow.

Element	Description
Page Content	<p>Select the desired output format for your PDF images. You can choose from the following:</p> <ul style="list-style-type: none"> ■ Formatted Text & Graphics: Each page of a Formatted Text & Graphics file, also known as PDF Normal, is made up of a combination of text and bitmap images. It is the default page content. It contains text that is scalable and can be indexed, searched, and copied to the clipboard. The documents preserve page formatting and graphic images. ■ Searchable Image - Exact: Searchable Image (Exact) page content shares the same features with PDF Normal, but also includes complete bitmaps for each page of the original document. Select this format when you need to keep the original scanned image of a document for legal or archival purposes but want the document to be searchable. ■ Searchable Image - Compact: Searchable Image (Compact) is a more compressed version of Searchable Image (Exact) in which text regions that contain no color are stored as monochrome rather than full-color images and can be indexed, searched, and copied to the clipboard. ■ Image Only: Image Only page content stores the entire content of each page as one large bitmap. Searches against the contents of these types of files are not available. However, processing PDF files of this type are tremendously faster as the PDF engine does not perform character or font recognition on the images. Note that the Adobe Acrobat Capture 3.0 Personal Edition does not decrement the Adobe hardware key for Image Only page content. <p>Note: The "Formatted Text & Graphics," "Searchable Image (Compact)," and "Searchable Image (Exact)" formats use the Adobe Acrobat Capture OCR engine to perform OCR on the text. You can control the behavior of the engine for words or characters that cannot be recognized by selecting "Suspect Regions" options, as described below.</p>
Language	<p>Select the desired language. The default is English (U.S.). Changing the language from English (U.S.) changes the character set, the primary spelling dictionary, and (with some languages) the recognition engine.</p>
PDF Document Information	<p>Enter or select the desired PDF document information. When viewing the PDF file, your selections will show up as "Document Info." You can enter text, select an index field, batch field, or an Kofax Capture Value for Title, Subject, Author, or Keywords.</p>
Dictionaries	<p>Select the desired dictionary for OCR processing. You can accept the default Adobe Acrobat Capture dictionary or select a predefined custom dictionary to process your documents. Note that the default dictionary is automatically populated after a workgroup hub has been selected.</p>
Workflows	<p>Select the desired workflow for Adobe Acrobat Capture processing. You can accept the default Adobe Acrobat Capture workflow or select a different workflow. Workflow's are automatically populated after a workgroup hub has been selected. Note that your workflow must have a designated watched folder. Adobe Acrobat Capture lets you create your own workflow or use one of the predefined workflow's.</p>
Suspect Regions	<p>Select the desired behavior for how suspect regions should be handled. A suspect region is one that the Adobe Acrobat Capture engine cannot recognize with a confidence level greater than or equal to your selected OCR confidence threshold.</p>

Element	Description
OCR confidence below	<p>Enter or select the desired OCR confidence threshold. If the confidence of a word is below the set confidence threshold, the word will be replaced with the original bitmap region. The default is 95 percent. You can choose a value from 0 to 100 percent.</p> <p>During processing, the Adobe Acrobat Capture engine assigns to each word a value that indicates how confident the engine is that its results are correct. The confidence threshold you choose will determine the minimum value returned from the engine that you want to accept. Only those words with a confidence level greater than or equal to your threshold will be returned as correct. All others will be returned as "Suspect Regions" and replaced with the original bitmap region.</p>
Suspect font	Select to replace unusual fonts with the original bitmap region if the confidence of the font is below the OCR confidence threshold.
Word not in dictionary	Select to replace a word with the original bitmap region if the word is not found in the specified dictionary.
Mixed alphanumeric	Select to replace a word with the original bitmap region if a word is found that contains mixed alpha and numeric characters.
Numeric only	Select to replace a word with the original bitmap region if a word is found that contains only numeric characters.
Advanced Settings	Select the appropriate check boxes to turn on and off advanced features.
Create thumbnails	Select to create thumbnails for every page in the document. Note that enabling this setting increases the file size significantly.
Embed fonts	Select to embed fonts in your document. This ensures that the fonts will be the ones you choose, even if those fonts are absent from the computer displaying the document. Embedded fonts must be identified in the Adobe Acrobat Capture Image Properties dialog box or assigned in Reviewer. Note that enabling this setting increases the file size significantly.
Enable links	Select to enable hyperlinks within your document such as table of contents, chapter, and index references. This will also add bookmarks to your PDF file for any titles and headings in your document.
Enable structure	Select to provide invisible tags for structural elements to use for searching and document navigation with PDF viewers. It is particularly useful to visually impaired users using a text-based user interface such as that provided by Adobe Document Server.
Automatic page rotation	Select to automatically detect the correct orientation of the page and rotate the image to that orientation. You may choose to clear this option if you know that all input pages will be properly oriented or if a step that handles rotation precedes the Capture Image step in your Adobe Acrobat Capture workflow.
Poll Adobe Acrobat Capture for status on submitted documents	<p>Select this check box to allow Kofax Capture to monitor the status of the Adobe Acrobat Capture conversion process. When polling is enabled, status messages are displayed at the Release workstation in the Kofax Capture PDF Release dialog box.</p> <p>Clear this check box to allow Kofax Capture to release document to Adobe Acrobat Capture and close the batch. The status of the Adobe Acrobat Capture conversion process will not be returned to Kofax Capture.</p>

Element	Description
Delete Adobe Acrobat Capture document if a processing error occurs	Select this check box to automatically cancel any "hung" documents in Adobe Acrobat Capture if an error occurs during the PDF conversion process. If cleared, the documents in error will remain in the Adobe Acrobat Capture workflow. This property is only available if you select the "Poll Adobe Acrobat Capture for status on submitted documents" check box. Note: If an Adobe Acrobat Capture error occurs during release, you must clear your Adobe Acrobat Capture finished documents and cancel any "hung" documents, either automatically or manually, before re-releasing the same documents in Kofax Capture.

A.6 Server Tab

The Server tab on the Oracle Content Server Release Setup dialog is used to specify settings for Oracle Content Server URL, user name, and password; to select options for workflow and primary/alternate file check in formats; and to access the CHECKIN parameters editor.

Element	Description
URL	Destination URL in Content Server.
User Name	Name of user.
Password	Password for user's name entered in the User Name field.
Primary file	Format type of the new native file check-ins.
Alternate file	Format type of the alternate file checkin that is web-viewable or can be converted to a web-viewable.

Element	Description
Allow Workflows	Select this check box to allow workflows.
Check In Adobe Acrobat Capture PDF with Errors	Select this check box to allow a new PDF file to be checked in that may contain errors.
Keep primary and alternate files in the release directory when the check in fails	Select this check box to retain the primary and alternate files in the release directory if the checkin procedure fails.
CHECKIN Service Parameters button	Processes the service parameter settings.

Using Adobe Acrobat Capture

This section covers the following topics:

- ["Configuring Adobe Acrobat Capture"](#) on page B-1
- ["Checking In Adobe Acrobat Capture PDF Files"](#) on page B-4

B.1 Configuring Adobe Acrobat Capture

If you are using the Adobe Acrobat Capture 3.0 software with Kofax Capture Export Component and Kofax Capture, you need to perform some additional setup tasks.

Note: Adobe Acrobat Capture must be installed on a different system than the release station for Kofax Capture.

Note: After configuring Adobe Acrobat Capture, the application must be left running at all times.

Adobe Acrobat Capture must be configured to watch for files and process them. This section covers the following topics:

- ["Creating a Watch Directory"](#) on page B-1
- ["Creating a Workflow"](#) on page B-2
- ["Creating a TIFF Workflow"](#) on page B-2
- ["Creating a JPG Workflow"](#) on page B-3

B.1.1 Creating a Watch Directory

Acrobat Capture uses a Watch directory to find output files from Kofax Capture. The Watch directory can be any directory that the Kofax Capture release station and the Adobe Acrobat Capture workstation have access to, with this exception: do not set the location to be the `Ascent\Images\OracleUCMScan\` directory.

Follow these steps to create a Watch directory in the default installation directory of Acrobat Capture:

1. Navigate to `Program Files\Adobe\Adobe Acrobat Capture 3.0\`.
2. Create a new directory named Watch.

B.1.2 Creating a Workflow

You will create a workflow to configure Adobe Acrobat Capture for use with Kofax Capture. The type of workflow you create depends on the type of file you are using to create the PDF:

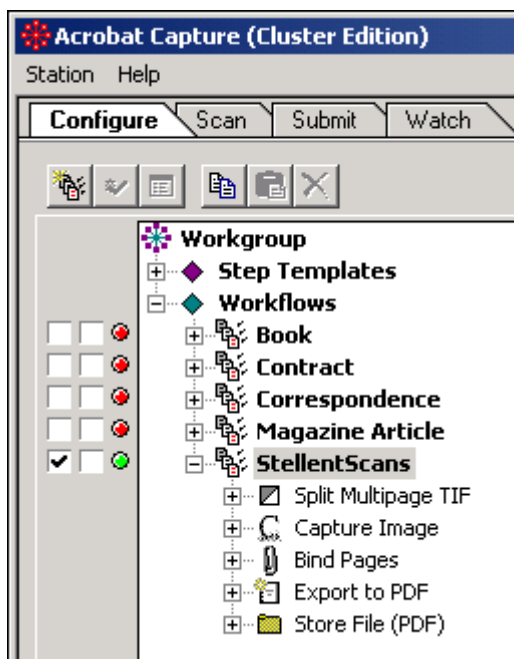
- "Creating a TIFF Workflow" on page B-2
- "Creating a JPG Workflow" on page B-3

B.1.3 Creating a TIFF Workflow

Use the following procedure to configure Adobe Acrobat Capture for use with Kofax Capture.

1. On the Windows taskbar, click the **Start** button, then select **Programs**, then select **Adobe**, then select **Acrobat Capture 3.0**, then select the applicable *version*.
2. On the Configure tab, select **Workflow**, and right-click **Insert Workflow**.

You will create a workflow that looks like the figure below.



3. Name the new workflow. (For example, OracleUCMScans.)
4. Select the new workflow name, and right-click **Insert Steps**.
5. Set Insert Step to **Split Multipage TIF**, and click **Insert**.
6. Set Insert Step to **Capture Image**, and click **Insert**.
7. Set Insert Step to **Bind Pages**, and click **Insert**.
8. Set Insert Step to **Export to PDF**, and click **Insert**.
9. Set Insert Step to **Store File (PDF)**, and click **Insert**.
10. Click **Done**.
11. Select the far-left check box to run the workflow.



12. Select the Watch tab, and click the Watched folder icon.



The Watched Folder Properties dialog is displayed.

13. Set **Location:** to the Watch directory that you created in the preceding procedure. If you created the Watch directory in the default installation directory of Acrobat Capture, this is `Program Files\Adobe\Adobe Acrobat Capture 3.0\Watch\`.

Note: If you set up the Watch directory on a networked drive, use UNC paths (for example, `\\hostserver\...\Watch`) to the Watch directory. Do not use mapped drives.

14. Set **Submit Files to Workflow:** to the new workflow that you created in step 3 (in this example, OracleUCMScans).
15. Click **OK**.

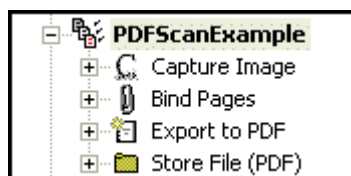
Note: The Adobe Acrobat Capture application must be running at all times so that it can process the Watched Folder contents whenever new files are submitted to it.

B.1.4 Creating a JPG Workflow

Use the following procedure to configure Adobe Acrobat Capture for use with Kofax Capture.

1. On the Windows taskbar, click the **Start** button, then select **Programs**, then select **Adobe**, then select **Acrobat Capture 3.0**, then select the applicable *version*.
2. On the Configure tab, select **Workflow**, and right-click **Insert Workflow**.

You will create a workflow that looks like the example below.



3. Name the new workflow. (For example, OracleUCMScansPDF.)
4. Select the new workflow name, and right-click **Insert Steps**.
5. Set Insert Step to **Capture Image**, and click **Insert**.
6. Set Insert Step to **Bind Pages**, and click **Insert**.
7. Set Insert Step to **Export to PDF**, and click **Insert**.
8. Set Insert Step to **Store File (PDF)**, and click **Insert**.
9. Click **Done**.
10. Select the far-left check box to run the workflow.



11. Select the Watch tab, and click the Watched folder icon.



The Watched Folder Properties dialog is displayed.

12. Set **Location:** to the Watch directory that you created in the preceding procedure. If you created the Watch directory in the default installation directory of Acrobat Capture, this is Program Files\Adobe\Adobe Acrobat Capture 3.0\Watch\.

Note: If you set up the Watch directory on a networked drive, use UNC paths (for example, \\hostserver\...\Watch) to the Watch directory. Do not use mapped drives.

13. Set **Submit Files to Workflow:** to the new workflow that you created in step 3 (in this example, OracleUCMScansPDF).
14. Click **OK**.

Note: The Adobe Acrobat Capture application must be running at all times so that it can process the Watched Folder contents whenever new files are submitted to it.

B.2 Checking In Adobe Acrobat Capture PDF Files

This section covers the following topics:

- ["Setting Up the Computer Running Adobe Acrobat Capture"](#) on page B-4
- ["Setting Up the Primary/Alternate File Formats"](#) on page B-5
- ["Setting Up the Image Files Release Directory"](#) on page B-5

B.2.1 Setting Up the Computer Running Adobe Acrobat Capture

On the computer running Adobe Capture:

1. Create a local directory to store the PDF file.
For example: c:\OracleUCMScans
2. Share that directory.
For example: Share c:\OracleUCMScans as "OracleUCMScans"
3. In Adobe Capture, set the UNC path in Store File properties.
For example: \\<AdobeCaptureComputerName>\OracleUCMScans
4. In Store File properties, select **No Renaming of Duplicates**.

B.2.2 Setting Up the Primary/Alternate File Formats

To set up the primary/alternate file formats:

1. Navigate to the Server tab on the Oracle Content Server Release Setup dialog.
2. Choose **Adobe Acrobat Capture PDF** from either the Primary or Alternate drop-down list.

Note: The Adobe Acrobat Capture PDF option only works if:

- Adobe Acrobat Capture PDF has been selected as the Image file type on the Image Format tab of the Oracle Content Server Release Setup dialog. See "[Selecting Adobe Acrobat Capture PDF Output File Types](#)" on page 3-11.
 - Adobe Acrobat Capture has been installed and properly configured to work with Kofax Capture. See "[Configuring Adobe Acrobat Capture](#)" on page B-1.
-
-

B.2.3 Setting Up the Image Files Release Directory

In the setup for Oracle Content Server for Kofax Capture:

1. Set the Image Files Release directory on the Document Storage tab to the UNC path of the location used by Adobe Capture to store the PDF file.

For example: \\<AdobeCaptureComputerName>\OracleUCMScans

2. Publish the batch class before the new settings can be used in a batch.

Setting Global Options

This section covers the following topics:

- ["About Global Options"](#) on page C-1
- ["Salvaging PDF Documents"](#) on page C-1
- ["Limiting the Error Check of the Adobe Acrobat Capture Log"](#) on page C-3

C.1 About Global Options

There is a Global Options dialog that you can use to:

- Salvage PDF documents
- Limit the error check of the Adobe Acrobat Capture log

To set either of these options, you must have write privileges to the registry. If you have any question regarding these settings, you may want to contact your system administrator or Information Technology department.

These settings only affect the workstation that is running the Release Script. If you use more than one release station, you may want to set these options on each one.

C.2 Salvaging PDF Documents

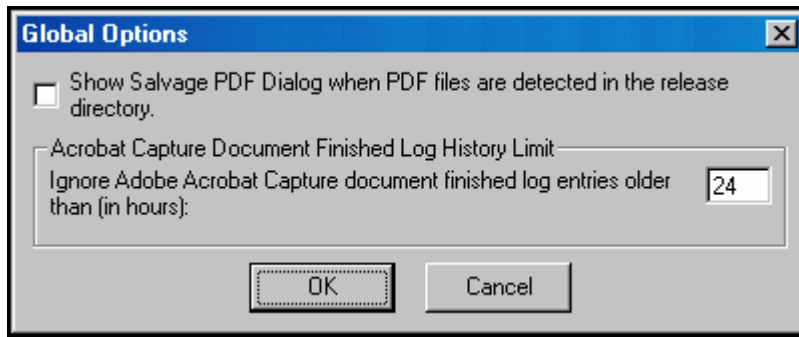
You can salvage PDF documents in the release directory for check in to prevent reconversion of the TIFF file in Adobe Acrobat Capture.

Note: If you run batches unattended, you must disable this feature. It is disabled by default.

It is recommended that you configure a separate release directory for each Kofax release station in order to prevent detection of PDF files generated by another batch running in a different release station. The dialog appears when a TIF would be sent to Adobe Acrobat Capture for PDF creation. If a format other than PDF is used, the dialog does not display.

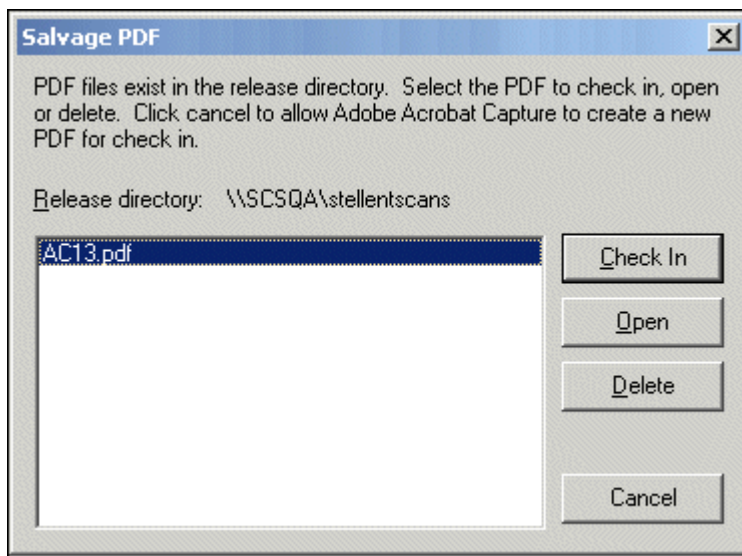
To salvage a PDF:

1. Double click `StellentRelOptions.exe`, which is typically installed in `<Kofax Capture Install>\Bin\StellentRel`, to open the Global Options dialog.



2. Select **Show Salvage PDF Dialog when PDF files are detected in the release directory**.
3. Click **OK**.
4. Run the release script for the batch as usual.

When the release script runs, it will inspect the release directory for PDF files. If PDF files exist, the following dialog displays, from which you can select a file to check in. Using this you can salvage the PDF if the check in fails but the file is still valid, rather than creating a new PDF from Capture.



5. From the list of PDF files that display, select what you would like to do:
 - Click **Check In** to select the PDF for check in as the primary or alternate file (without needing to go through the Adobe Acrobat Capture step).
 - Click **Open** to display the PDF in its associated application, which is typically Adobe Acrobat Reader.
 - Click **Delete** to delete the PDF file from the release directory.
 - Click **Cancel** (or use the escape key on your keyboard) to have Adobe Acrobat Capture create the PDF as usual.

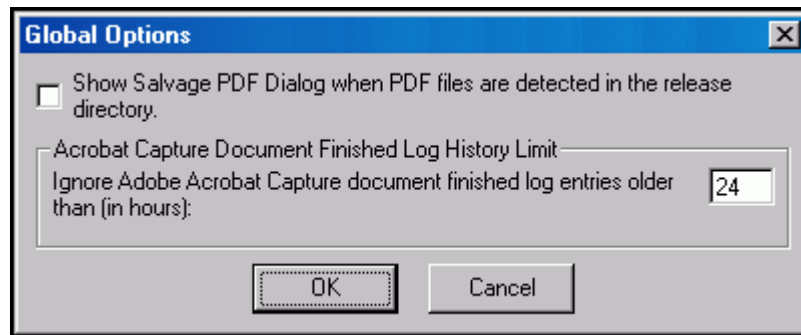
Note: The Check In, Open and Delete buttons are available once you select a PDF file from the dialog.

C.3 Limiting the Error Check of the Adobe Acrobat Capture Log

You can limit the error check of the Adobe Acrobat Capture finished document log to documents that finished within a given number of hours from the present time. This setting can be changed by running the `StellentRelOptions.exe` that is typically installed in `<Kofax Install Dir>\Bin\StellentRel`.

To set the log history limit:

1. Double click `StellentRelOptions.exe`, which is typically installed in `<Kofax Install Dir>\Bin\StellentRel`, to open the Global Options dialog.



2. Select **Acrobat Capture Document Finished Log History Limit**.
3. Enter the cut off point, in hours, for the log file. The Adobe Acrobat Capture log will be limited to entries within the period of time you specify. Any entries older than the time entered will not be inspected. Typically, you do not need to change this value.
4. Click **OK**.

Index

A

- Adobe Acrobat Capture
 - checking in PDF files, B-4
 - configuring, B-1
 - limiting the error check, C-3
 - selecting PDF as output file type, 3-11
 - setting options for PDF, 3-13
 - specifying PDF settings, 3-11
- Adobe Acrobat Capture settings dialog, A-4
- Ascent Capture
 - configuration, 2-5
 - configuring in a non-default directory, 2-7
 - configuring to use Kofax Capture, 2-5
 - document classes, 3-4
 - field types, 3-3
 - form types, 3-7
 - mapped index fields, 3-5
 - setting up document classes, 3-4
 - setting up field types, 3-3
 - working with batch classes, 3-1
- Ascent Capture Client Systems
 - configuration, 2-5
- audience, vii

C

- CHECKIN Parameters
 - mapping, 3-14
- CHECKIN Parameters Editor
 - accessing, 3-14
- configuration
 - Ascent Capture, 2-5
 - Ascent Capture Client Systems, 2-5
 - Ascent Capture in non-default directory, 2-7
 - for Ascent Capture to use Kofax Capture, 2-5
- conventions
 - used in documentation, viii

D

- document classes
 - for Ascent Capture, 3-4
 - setting up for Ascent Capture, 3-4
- Document Storage tab, A-3
 - using, 3-9

- documentation
 - audience for, vii
 - conventions, viii
 - related documents, viii

F

- field types
 - for Ascent Capture, 3-3
 - setting up for Ascent Capture, 3-3
- file formats
 - setting primary or alternate, 3-12
- file types
 - selecting Adobe Acrobat Capture PDF, 3-11
 - selecting multipage TIFF, 3-10
 - selecting TIFF, JPG or PCX, 3-10
 - setting for released images, 3-10
- form types
 - for Ascent Capture, 3-7

G

- Global Options
 - overview, C-1

I

- Image Format tab, A-4
 - using, 3-9
- index fields
 - mapping to CHECKIN Parameters, 3-14
 - setting up mappings for optional parameters, 3-15
 - setting up mappings for required parameters, 3-15
- Index Storage tab, A-2
 - using, 3-8
- index values
 - setting, 3-9
- installation
 - compatibility with Adobe Acrobat Capture, 1-2
 - compatibility with Content Server, 1-1
 - compatibility with Kofax Ascent Capture, 1-1
 - Kofax Capture, 2-2
 - Kofax Capture - new install, 2-4
 - Kofax Capture - update install, 2-2

- pre-install tasks and considerations, 2-1
- software requirements, 1-1
- summary, 2-1
- verifying Kofax Capture install, 3-17

J

- JPG workflow
 - creating, B-3

K

- Kofax Capture
 - configuring Ascent Capture, 2-5
 - customizing the release script, 3-7
 - installation, 2-2
 - new install, 2-4
 - update install, 2-2
 - verifying installation, 3-17
- Kofax index fields
 - mapping to CHECKIN Parameters, 3-14
 - setting up mappings for optional parameters, 3-15
 - setting up mappings for required parameters, 3-15

M

- mapped index fields
 - for Ascent Capture, 3-5
- mappings
 - Kofax index fields to CHECKIN Parameters, 3-14
 - setup for optional parameters, 3-15
 - setup for required parameters, 3-15

P

- parameters
 - CHECKIN, 3-14
 - date and time, 3-16
 - debugging, 3-17
 - optional, 3-15
 - required, 3-15
- PDF documents
 - salvaging, C-1
- PDF settings
 - specifying, 3-10
- pre-installation tasks and considerations, 2-1
- product overview, 1

R

- release script
 - accessing CHECKIN Parameters Editor, 3-14
 - accessing the setup dialogs, 3-8
 - customizing, 3-7
 - selecting multipage TIFF output file types, 3-10
 - selecting Adobe Acrobat Capture PDF output file types, 3-11
 - selecting TIFF, JPG, or PCX output file types, 3-10
 - setting file type of released images, 3-10

- setting index values, 3-9
- setting options for Adobe Acrobat Capture PDF files, 3-13
- setting primary or alternate file formats, 3-12
- setting URL, user name and password, 3-12
- setting workflow status, 3-12
- specifying Adobe Acrobat Capture PDF settings, 3-11
- specifying PDF settings, 3-10
- using the Document Storage tab, 3-9
- using the Image Format tab, 3-12
- using the Index Storage tab, 3-8
- using the Server tab, 3-12

- requirements
 - compatibility with Adobe Acrobat Capture, 1-2
 - compatibility with Content Server, 1-1
 - compatibility with Kofax Ascent Capture, 1-1
 - software, 1-1

S

- Server tab, A-8
 - using, 3-12
- setup dialogs
 - accessing, 3-8

T

- Text Release Setup page, A-1
- Tiff workflow
 - creating, B-2

W

- Watch directory
 - creating, B-1
- workflow
 - creating, B-2
 - setting status, 3-12