



RED EAGLE CONSULTING, INC.

Text Foldering Release for Kofax Capture©

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Installation and Administration User Guide

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How to Use This Guide

Introduction

This guide contains essential information for installing and configuring the RECI Text Foldering Release.

This guide assumes that you have a thorough understanding of Windows standards, applications, and interfaces. It also assumes that you have a thorough understanding of Kofax Ascent Capture.

This guide is for system administrators or other users who are installing and configuring the RECI Text Foldering Release and need a description of the procedures and requirements.

How this Guide is Organized

This guide is divided into the following sections:

- ❖ Chapter 1 – Overview providing an introduction to the content of this guide.
- ❖ Chapter 2 – Requirements describes system requirements and recommendations for installing and using RECI Text Foldering Release.
- ❖ Chapter 3 – Installation provides the instructions for installing the release script.
- ❖ Chapter 4 – Administration provides information for configuration of a document class with the release script.
- ❖ Appendix A – Macro Text Syntax describes use and syntax properties of using the macro feature of the release script.
- ❖ Appendix B – File Naming Rules describes the process of setting up a rule for file duplication, merge, versioning or error handling when writing files.

Related Documentation

For further research and knowledge related to the installation or configuration of Ascent Capture you should reference the following documentation.

- Ascent Capture 7.x
 - Installation Guide for Ascent Capture and Ascent Capture Internet Server
 - Getting Started with Ascent Capture and Ascent Capture Internet Server
- Kofax Capture 8.x
 - Installation Guide
 - Getting Started Guide

Training

Red Eagle Consulting, Inc. does not currently provide any specific training for the RECI Text Foldering Release. However, if you are currently under a support agreement, you can call our support staff for any assistance. You can also set up a demo or simple use training with our sales staff.

Technical Support

For additional technical information about Red Eagle Consulting, Inc. products or services, please contact our support staff.

Introduction

The Kofax Ascent Capture system is designed to support both document and data capture in a single application. It provides a significant amount of control over how your documents are processed. After you have processed your documents within the Capture system, you will normally want to hand the data and documents off to another system for storage and future retrieval. This process is called release. Ascent Capture comes with a few basic release scripts. These built-in release scripts provide a limited feature set. The RECI Text Foldering Release script is an additional release component that can be used instead of the Ascent Capture Text Release.

This guide will provide you with important information about installing and configuring the release within the Kofax/Ascent Capture system.



Requirements

Introduction

The RECI Text Foldering Release has been tested and can be used with the following versions of Kofax/Ascent Capture:

- Ascent Capture 7.x
- Kofax Capture 8.x

Hardware and System Requirements

The RECI Text Foldering Release does not require any additional hardware and system requirements than are required for the Capture system it is installed in.

NOTE: Releasing documents and metadata from the Capture system can consume large amounts of disk space. You should have the appropriately sized target locations when releasing.

Windows Installer and the .NET Framework 2.0 are also required for the installation.

Introduction

This chapter provides step-by-step instructions for installing the RECI Text Folders Release. These instructions are for use by system administrators that have a working knowledge of the Kofax Capture system.

In order to install the release you will need to have a working installation of the Capture system.

Installing

You will need to execute the setup.exe file contained in the installation package. The setup.exe application will start the installation and check for the Windows Installer and .NET Framework prerequisites.

The installation has four main screens that will prompt you while installing the application. Each screen has its own purpose as described below.

Welcome

The welcome screen simply informs you that this installation is being installed in an Evaluation mode and notifies you of the copyright laws. Click next to continue.



Figure 1 Welcome Screen

License Agreement

The license agreement must be agreed to in order to install this software. Select "I Agree" and click next to continue.

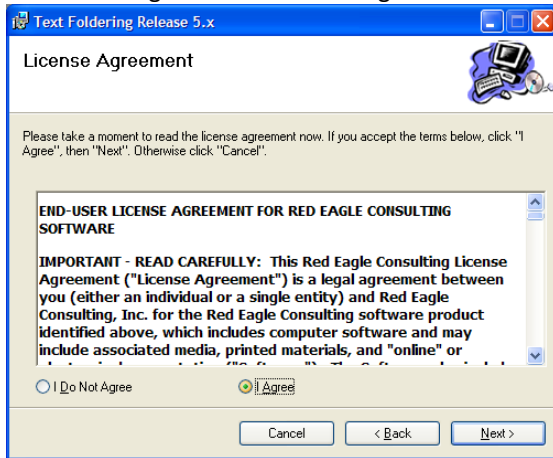


Figure 2 License Agreement Screen

Select Installation Folder

This screen is prompting you for the installation target folder. You can choose an alternative folder other than the default. However, **do not** select the bin folder of the Kofax Capture installation. This could damage your Kofax installation. You should always choose the "Everyone" selection for this application unless you are told otherwise by someone on our support staff.

NOTE: Installing the release script into the Ascent Capture bin folder will produce unpredictable results. Do not install the release script into the Ascent Capture Bin folder unless directed by our support staff.

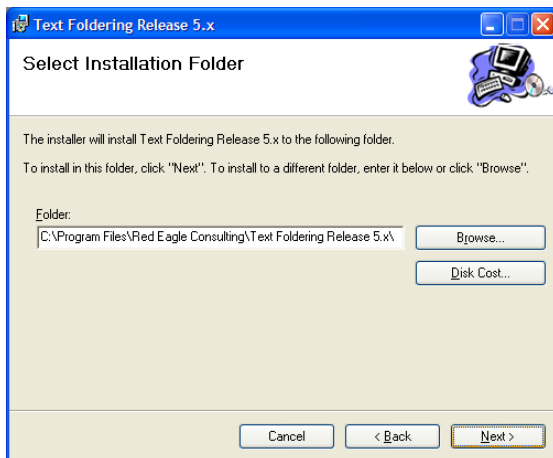


Figure 3 Installation Folder Screen

Other Screens

The other screens are for confirmation that you want to install and progress dialogs.

Questions about installation

How do you get a license?

Contact our sales staff to get your license file. You will need to have your Kofax Serial number and company name for the file to be generated. When operating in an unlicensed evaluation mode the administration components will work the same as in the licensed mode. You will not be able to release files in an unlicensed evaluation mode.

How do I tell if I am licensed?

Open the administration dialog and click the “About” button on the bottom left hand side of the dialog. The About dialog window will open and display your license status for the machine it is currently running.

How can it be successfully installed if I don't see it as a choice for document classes?

This can happen on some installations of Ascent Capture. The release registration process within the Kofax Administration module failed during installation. You can manually register the release script by following the steps below.

- Start the Administration module of Kofax.
- Select from the main menu Tools -> Release Script Manager
- From the Release Script Manager Dialog click the Add button on the bottom left.
- Browse to the installation folder you specified during the install and select the inf file for the release script. It will be named “reci.Kfx.TextFolderRelease.inf.” If you did not change the default folder, you should be able to find it within the %Program Files%\Red Eagle Consulting\Text Foldering Release\ folder.
- The Add Release Script dialog will be displayed. Select the Release script from the list and click the Install button.
- Your script will be registered and useable within the administration module.



Introduction

After installation you will want to configure document classes within the Kofax Capture system to utilize the release script. You must have at least one document class created in order to set up the release script.

Release instance set up name (32 characters or less) is used to refer to your set up in the Release Scripts dialog box. This field is not required, but may help you track your settings when configuring multiple releases to a single document class.

General Settings



Figure 4 General Settings

Media Folder Settings

The media folder is used if you want to set up a common root folder for each release type. You can enforce media limits on this folder. You can use UNC or drive letter paths in this setting. Remember that if you use a drive letter mapping that the drive must be accessible from each instance of the Kofax Release Module. The impersonating user should have at least read, write and modify rights to the UNC or drive letter target folders.

Media Limits

At times you may want to release documents to be burned to CD or DVD. If you would like to separate your released documents into folders based on content size, enable the media limits by checking the “Enforce media limits” checkbox. You can select the size for enforcement to fit almost any media.

You must specify the media file folder name. You can use a macro value or a static value for this name. The name will be appended with the starting number for the first folder in the media root. As documents are released, the content within the folder will be checked to ensure that it does not exceed the media file size. If the addition of the currently releasing document will cause the current media folder to exceed the limit a new folder will be created. The current media file folder number will be incremented and appended to the media file folder name.

NOTE: Do not use a “\” for the first character in the name. This will cause the release to put the files in the root of the current drive for the operating user. If using a macro for this value, you should ensure that it will not have a “\” as the first character.

Providing a zero value for the media file size limit will cause the check to never be applied. Thus all documents will be put into the media folder with the starting number only.

Within the media folder root a file will be created to keep up with the current media folder number. This will be used to “skip” to the current folder as each document is being released. The file name will be the same as the media file folder and the extension will be “ID.”

If you have a need to advance the release to a different number for the folders and the batch class has already been published, you can change the number contained within the media ID file.

NOTE: If you change the media ID file to an invalid number or format, this may cause unpredictable results.

Replacement Character Settings

When using dynamically created file and folder names, characters that are not legal for the file system or generally undesirable could be generated. The default characters listed for document (file) names and folder names are not legal characters in the Windows operating system. The default replacement is blank. Having a blank replacement value removes the unwanted characters from the resulting file or folder name. It is recommended that you leave “\” and “:” out of the unwanted character list for folder names. These characters are used in Windows operating systems to denoted drive letter and subfolder traversal. If there are illegal characters in a document or folder name an error is generated and the document cannot be released from the Kofax system.

Metadata Settings

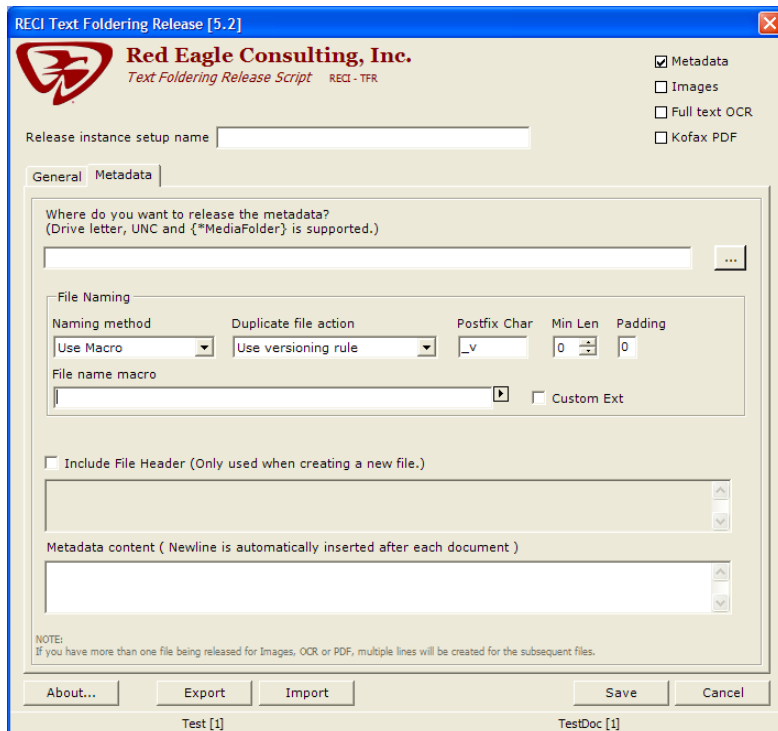


Figure 5 Metadata settings

You must specify where the metadata file will be released. You can specify a static path, a macro, or a combination of these. However you specify the path it should result in a legal operating system folder path. You could use macro values to specify subfolders.

NOTE: If you use the MediaFolder macro, it should be the first part of the target folder path. Placing it anywhere else in the path could cause the releasing file to be lost.

See the file naming rules appendix for details on how to set up file naming rules.

Image Settings

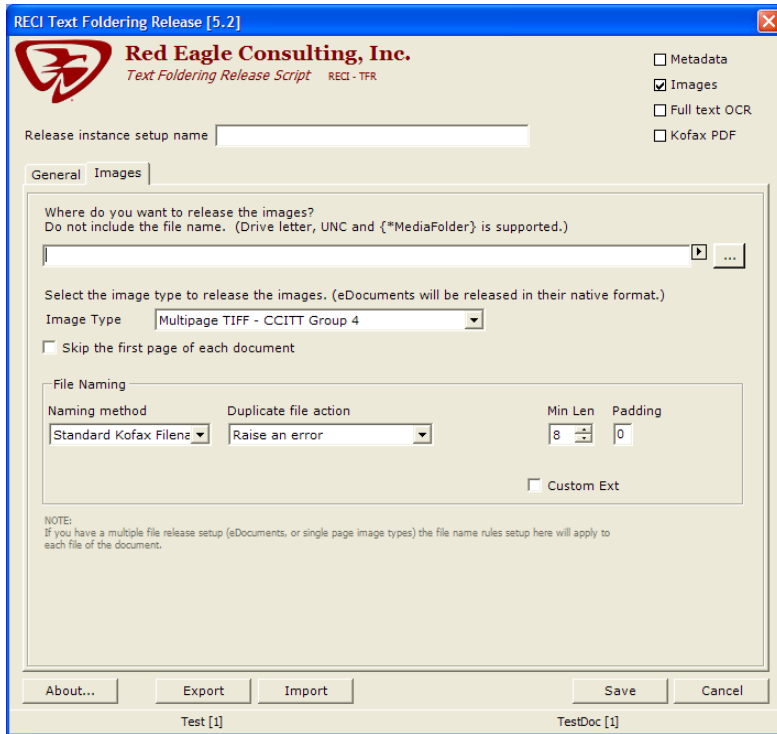


Figure 6 Image settings

You must specify where the image file(s) will be released. You can specify a static path, a macro, or a combination of these. However you specify the path it should result in a legal operating system folder path. You could use macro values to specify subfolders.

NOTE: If you use the MediaFolder macro, it should be the first part of the target folder path. Placing it anywhere else in the path could cause the releasing file to be lost.

Image Type

Select the desired file format/compression format combination to use for your images. The images will automatically be stored in the selected format upon release. The default combination is Multipage TIFF – CCITT Group 4. The images will have the extension that is appropriate for their file type. eDocuments will be released as they were imported into the Capture system.

To prevent the first page of your images (not eDocuments) to be released put a check in the “Skip the first page of each document” checkbox.

See the file naming rules appendix for details on how to set up file naming rules.

Kofax PDF Settings

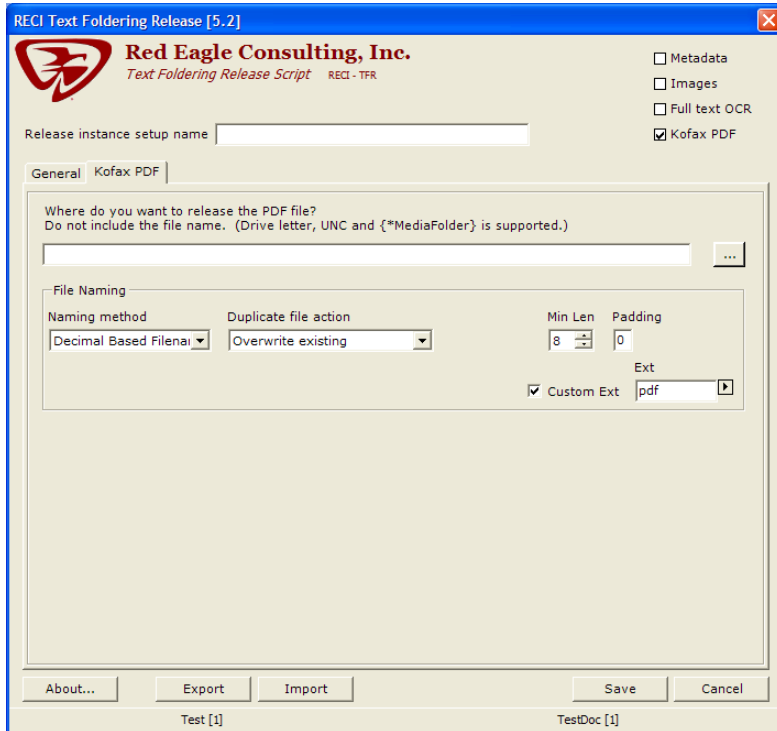


Figure 7 Kofax PDF settings

If you have enabled Kofax PDF generation on a document class, the Kofax PDF checkbox will be enabled. If you select this option a new tab will be added to the dialog. You can then set up the release properties for the PDF file generated by the Capture system. You must specify where the file will be released. You can specify a static path, a macro, or a combination of these. However you specify the path it should result in a legal operating system folder path. You could use macro values to specify subfolders.

NOTE: If you use the MediaFolder macro, it should be the first part of the target folder path. Placing it anywhere else in the path could cause the releasing file to be lost.

See the file naming rules appendix for details on how to set up file naming rules.

Full Text OCR Settings

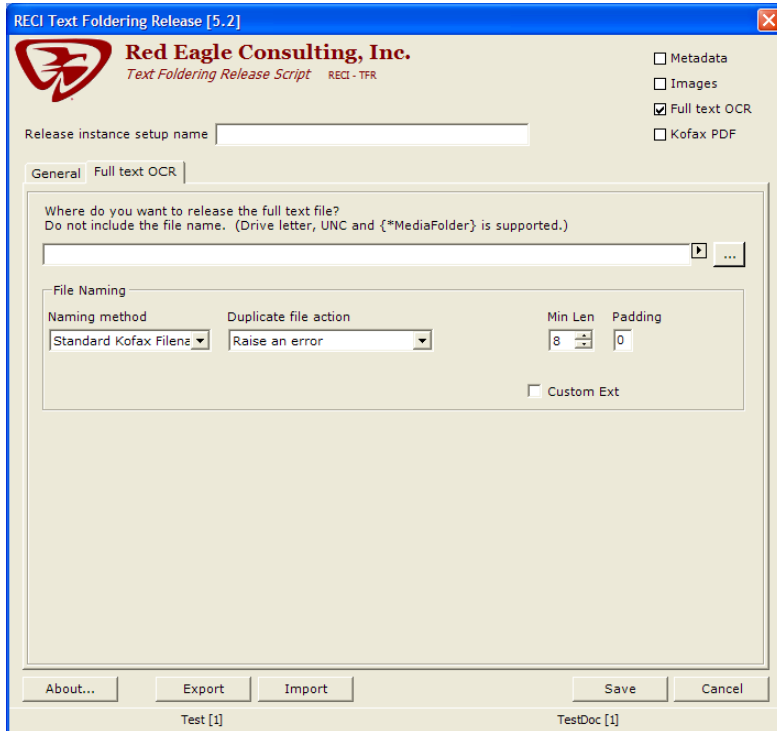


Figure 8 Full Text OCR

If you have enabled OCR full text on a document class, the Full Text OCR checkbox will be enabled. If you select this option a new tab will be added to the dialog. You can then set up the release properties for the full text OCR file generated by the Capture system. You must specify where the file will be released. You can specify a static path, a macro, or a combination of these. However you specify the path it should result in a legal operating system folder path. You could use macro values to specify subfolders.

NOTE: If you use the MediaFolder macro, it should be the first part of the target folder path. Placing it anywhere else in the path could cause the releasing file to be lost.

See the file naming rules appendix for details on how to set up file naming rules.

Export and Import

A new feature within version 8 of Kofax Capture is copying and pasting document and batch classes. This is helpful in setting up new document and batch classes that are very similar to one another. However, when using this feature in Kofax Capture the release script settings are not copied. You have to recreate the release script settings for the new document classes all over. To aid in this we created an export/import option within the release script itself.

The export/import feature of the release has many uses. Since the export file is a standard XML file, you can use it to compare release script set ups across document classes or even systems. If you have a common media folder for all your document classes you could set the release settings for the common values and export it. Then you could import the common settings for each new document class to help speed the release script set up. This will also reduce the number of errors while setting up the different document classes.

To export your settings simply click the export button and choose a file location. An XML file will be created containing your settings for the current release set up.

Importing a set up is equally as simple. Click the import button and choose the existing file from the file system. The settings will be parsed and applied to the current release set up.

Appendix A – Macro Text Syntax

Introduction

This section addresses the following questions:

- What are macros or macro text?
- How are macros or macro text used?
- When are macros or macro text used?
- What are the limitations of macros or macro text?
- What formats do macros or macro text allow?
- What happens when macros or macro text are wrong?
- Can you use the advanced options with “standard” macros?
- What are the advanced options?

Macro Item Syntax

Each format item takes the following form and consists of the following components:

```
{macroText[,alignment][:formatString][~dataType[!]]}
```

The matching braces ("{" and "}") are required.

Macro Text

The mandatory macro text component identifies a corresponding item in the list of macros. Multiple format items can refer to the same element in the list of objects by specifying the same parameter specifier. For example, you can format the same numeric value in hexadecimal, scientific, and number format by specifying a composite macro format string like this: "{Index1:X} {Index1:E} {Index1:N}". Each macro item can refer to any available macro. For example, if you wanted to concatenate three macro values into one destination field, you can format them in any order. If you specify a macro name that does not exist, the macro will be ignored.

Alignment Component

The optional alignment component is a signed integer indicating the preferred formatted field width. If the value of alignment is less than the length of the formatted string, alignment is ignored and the length of the formatted string is used as the field width. The formatted data in the field is right-aligned if alignment is positive and left-aligned if alignment is negative. If padding is necessary, white space is used. The comma is required if alignment is specified.



Format String Component

The optional `formatString` component is a format string that is appropriate for the type of object being formatted. Specify a numeric format string if the corresponding object is a numeric value, a date and time format string if the corresponding object is a `DateTime` object, or an enumeration format string if the corresponding object is an enumeration value. If `formatString` is not specified, the general ("G") format specifier for a numeric or date and time type is used. The colon is required if `formatString` is specified.

For a complete list of specifiers for the format string you can utilize the MSDN custom format string defined for each kind of value. The following links are provided for convenience. However, Microsoft often updates their site and these links may no longer be good. You can run the search the MSDN site for the title of each link. Refer to the .NET Framework 2.0 version of the format strings.

Custom DateTime Format Strings

[http://msdn2.microsoft.com/enus/library/8kb3ddd4\(VS.80\).aspx](http://msdn2.microsoft.com/enus/library/8kb3ddd4(VS.80).aspx)

Custom Numeric Format Strings

[http://msdn2.microsoft.com/en-us/library/0c899ak\(VS.80\).aspx](http://msdn2.microsoft.com/en-us/library/0c899ak(VS.80).aspx)

Data Type Component

The optional data type component has two parts. The first is an identifier indicating what data type is expected to be formatted. This will ensure that the format string used will be used against the proper data type. If the translator cannot perform the cast of the value to the specified data type an exception will result. This exception can be ignored by setting second part of the component to `!`. Not specifying a value will signal the translator to throw the exception. If the exception is ignored the value will be converted to a string and returned ignoring formatting. However, alignment will still be considered. Possible values for the data type identifier are as follows: `D` = `DateTime`, `I` = `Int32`, `F` = `Decimal`.

Escaping Braces

Opening and closing braces are interpreted as starting and ending a format item. Consequently, you must use an escape sequence to display a literal opening brace or closing brace. Specify two opening braces ("{{") in the fixed text to display one opening brace ("{"), or two closing braces ("}}") to display one closing brace ("}"). Braces in a format item are interpreted sequentially in the order they are encountered. Interpreting nested braces is not supported. The way escaped braces are interpreted can lead to unexpected results. For example, consider the format item "{{{0:D}}}", which is intended to display an opening brace, a numeric value formatted as a decimal number, and a closing brace. However, the format item is actually interpreted in the following manner: The first two opening braces ("{{") are escaped and yield one opening brace. The next three characters ("{0:") are interpreted as the start of a format item. The next character ("D") would be interpreted as the Decimal standard numeric format specifier, but the next two escaped braces ("}}") yield a single brace. Because the resulting string ("D}") is not a standard numeric format specifier, the resulting string is interpreted as a custom format string that means display the literal string "D}". The last brace ("}") is interpreted as the end of the format item. The final result that is displayed is the literal string, "{D}". The numeric value that was to be formatted is not displayed.

Appendix B - File Naming Rules

The screenshot shows a 'File Naming' dialog box with the following settings:

Naming method	Duplicate file action	Postfix Char	Min Len	Padding
Use Macro	Use versioning rule	_v	0	0

Below these fields, there is a 'File name macro' text box and an 'Ext' text box. A checkbox labeled 'Custom Ext' is checked.

Figure 9 File Naming Rule

Naming Method

Standard file name (hexadecimal number)

Select this option if you want file names to be created using the standard Kofax file naming convention which uses the unique document ID value generated by the system and formats it into a hexadecimal format. For example, if the document ID is 19A27C (shown as a hexadecimal number) then the file name would be 19A27C. Any applicable or known file extension is automatically applied.

Decimal based file name (integer)

Select this option if you want file names to be created using decimal numeric values. This method uses the unique document ID value generated by the system and formats it into a decimal representation. For example, if the document ID is 19A27C (shown as a hexadecimal number) then the file name would be 1679996 (converted to an integer). Any applicable or known file extension is automatically applied.

Use Macro

Select this option if you want file names to be created using the macro text field provided. This method uses the macro variable replacement to generate a file name dynamically with values provided at release time. You can use any macro or static text combination to build the rule for the file name. For example, if you wanted to format the file name as the current date you could provide the following macro: {Current Date:MM-dd-yyyy~D}. If today was September 11, 2008, you would have the result of 09-11-2008. Any applicable or known file extension is automatically applied.

Duplicate File Action

Raise error

Select this option if you want the release script to error if the file name and destination folder already exist. The batch will be sent back to the Quality Control queue and the document will be rejected.

Overwrite existing

Select this option if you want the release script to overwrite the existing file. There are no messages or rejection of the document or batch. The file is overwritten and release continues.

Use versioning rule

Select this option if you want the release script to use the version rules for existing files. If the file name and destination folder already exist, a new file name is created using the postfix characters and a number. The number is increased until a file name is created that does not already exist.

Try merge, otherwise error

Select this option if you want the release script to merge the new file with the existing file. This feature has limited support. Currently only supports text based files; any other format may result in a corrupted release file.

CAUTION: Do not use this option with non-text based file types. The resulting merged file may be damaged and unreadable if it is not a text-based file type.

Minimum File Name Length

Many times it is desirable for a file name to be made a minimum length. An example is using values for the name that you want to sort easily in a list. Setting the minimum file name length and the pad character will provide this capability. For example, if you wanted to have an 8.3 file name padding the left with zeros, you would set the minimum file name length value to 8 and the pad character to a zero.

NOTE: When using a macro for the file naming, the minimum file name length is set to zero by default. This effectively turns off the minimum file name length.

Pad character

This will be the character used to fill the remaining spaces in the file name to meet the minimum length requirement.

Use custom extension

Select this option if you want to specify the file name extension. If you do not check this option the source file extension will be used when applying file naming rules. If there is no source file when releasing, such as with Metadata files, there will be no extension used.

NOTE: You may want to specify a custom file extension when setting up the metadata file naming rule.

Custom extension

You can specify a static value or macro variable for the custom extension for the file naming rule. You do not need to provide the “.” before the extension value. It will be provided when building the file name at release.