

Kofax Communication Server

TC/LINK-RS Hummingbird Integration Technical Manual

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The KOFAX logo is displayed in a bold, blue, sans-serif font. The letters are thick and closely spaced, with a clean, modern appearance.

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Preface

This document explains how to use the **Kofax Export Connector 7.5 for OpenText eDocs DM** together with *TC/LINK-RS* (KCS Link to export connectors).

The Kofax Export Connector 7.5 for OpenText eDocs DM supports Hummingbird DM 5.0, Hummingbird Enterprise – DM 5.1, and Hummingbird Enterprise – DM 5.1.05 (Hummingbird Enterprise 2004 – DM).

Together with *TC/LINK-RS*, this export connector releases fax images and fax metadata from the TCOS Server into the DM repository.

Related documentation

This document refers to the following documentation:

- Help for Kofax Export Connector 7.5 for OpenText eDocs DM
- Release Notes for Kofax Export Connector 7.5 for OpenText eDocs DM
- TC/LINK-RS Technical Manual

For more information about OpenText eDocs DM or other OpenText eDocs products, contact your OpenText eDocs representative or refer to the documentation available with the OpenText eDocs DM product.

The full documentation set for Kofax Communication Server is available at the following location:

https://docshield.kofax.com/Portal/Products/en_US/KCS/10.3.0-SihMvq5oti/KCS.htm

Chapter 1

System Requirements

This section lists the supported server versions as well as the system requirements for installation of the Kofax Export Connector 7.5 for OpenText eDocs DM.

Important Before installing any of the OpenText eDocs DM software patches, we suggest that you review the patch installation sequence recommended by OpenText eDocs. For more information about the installation sequence or the software patches provided by OpenText eDocs, visit the website at www.hummingbird.com or contact your OpenText eDocs representative.

OpenText eDocs DM Server Support

The Kofax Export Connector 7.5 for OpenText eDocs DM requires the following network server components:

- Hummingbird DM Server 5.0 (with Patch 1 and Patch 5), Hummingbird DM Server 5.1 (with Patch 4), or Hummingbird DM Server 5.1.0.5 (with Service Release 4 and Maintenance Release 4)
- Hummingbird DM Web Server 5.0 (with Patch 1 and Patch 7), Hummingbird DM Web Server 5.1 (with Patch 1), or Hummingbird DM Web Server 5.1.05 (with Service Release 4 and Maintenance Release 4)
- Hummingbird DM API 5.0 (with Patch 1 and Patch 5). Hummingbird DM API 5.1 (with Patch 1), or Hummingbird DM API 5.1.05 (with Service Release 4 and Maintenance Release 4)
- Hummingbird DM Extension API 5.0 (with Patch 7) or Hummingbird DM Extension API 5.1 (with Patch 1), or Hummingbird DM Extension API 5.1.05 (with Service Release 4 and Maintenance Release 4)

Note Refer to the Release Notes of the Kofax Export Connector 7.5 for OpenText eDocs DM for a list of tested OpenText eDocs server versions.

Hummingbird Records Management Support

The Kofax Export Connector 7.5 for OpenText eDocs DM supports the following Hummingbird Records Management systems:

- Hummingbird Records Management Server 5.0
- Hummingbird Records Management Server 5.1
- Hummingbird Records Management 5.1.05 Client Operating System Support

Requirements for TC/LINK-RS Computer

This section contains the requirements for TC/LINK-RS computer.

Operating system

Refer to the Technical Specifications document.

Additional software

- Microsoft .Net runtime files: Install these files as they are needed by the TCReleaseConfig application, which is installed together with TC/LINK-RS. You can download the .Net runtime version 2.0 from the Microsoft web page
- TC/LINK-RS:
The link must be installed prior to installation of the export connector. When running the TC/LINK-RS setup for the first time, select the "Install CAP tools" checkbox.
- Hummingbird DM API 5.0 and Hummingbird DM Extensions API 5.0, or Hummingbird DM API 5.1 and Hummingbird DM Extensions API 5.1, or Hummingbird DM API 5.1.05 and Hummingbird DM Extensions API 5.1.05
- Hummingbird Windows Explorer DM Extension 5.0, Hummingbird Windows Explorer DM Extension 5.1, or Hummingbird Windows Explorer DM Extension 5.1.05

Note We recommend that you install the Hummingbird DM 5.1 Performance Patch Build 168 (for Hummingbird DM 5.1 with Patch 2) or Build 169 (for Hummingbird DM 5.1 with Patch 1) on your client workstations.

Privileges

To install the Kofax Export Connector 7.5 for OpenText eDocs DM you must have Windows administrator privileges. If you do not have administrator privileges and install this export connector, you may receive error messages and several of the files may not install correctly.

Chapter 2

Installing the Export Connector

You must install the Kofax Export Connector 7.5 for OpenText eDocs DM on every TC/LINK-RS workstation.

Installation Instructions

Use the following instructions to install the Kofax Export Connector 7.5 for OpenText eDocs DM.

1. Insert your Kofax Export Connector 7.5 for OpenText eDocs DM 5.0-5.1 installation CD into your CD drive.
2. From your Windows task bar, select **Start | Run**, browse to the Hummingbird\DM5 folder on the CD, and run **Setup.exe**.
The installation program will start.
3. Follow the instructions on your screen to install the export connector.
4. When the installation is complete, a message is displayed that indicates the export connector was successfully installed.
5. Start the TCReleaseConfig application to register the export connector in the TC/LINK-RS configuration folder:
 - a. In the Release scripts panel, click the **Add** button.
 - b. Select the DMRel5_v7.INF file in the working folder of the Kofax Export Connector 7.5 for OpenText eDocs DM.
 - c. Click **Install**.
6. Repeat this procedure on all TC/LINK-RS workstations that will use the Kofax Export Connector 7.5 for OpenText eDocs DM.

Chapter 3

Source Code

The source code for the Kofax Export Connector 7.5 for OpenText eDocs DM is available in the Hummingbird\DM5 folder on the Kofax Export Connector 7.5 for OpenText eDocs DM 5.0-5.1 installation CD. You can open the source code, edit it and compile it in Visual Basic 6.0 with Service Pack 6.

To modify the export connector:

1. When you [install the OpenText eDocs DM export connector](#), you will install the required components referenced in the source code.
2. Open the source code, make changes as needed, and compile the OpenText eDocs DM source code in Visual Basic.
3. Copy the newly created DMRel5_v7.dll to the installation directory (for example, C:\Program Files\Ascent\CAP\DMRel5_v7\DMRel5_v7.dll). When you are prompted to replace the existing file, select **Yes**. Repeat this procedure on each TC/LINK-RS workstation that will be using the OpenText eDocs DM export connector. You may want to make a copy of the file for backup purposes, and store the copy in a safe location.

Note To successfully modify and compile the export connector, development must occur on a workstation with the appropriate versions of TC/LINK-RS, CAPTools, and the OpenText eDocs DM export connector previously installed. To use the modified export connector, you must replace the OpenText eDocs export connector DMRel5_v7.dll with the modified version on the TC/LINK-RS workstation.

If you receive an "access denied " error, you will need to close TCReleaseConfig and TC/LINK-RS.

Refer to the documentation available for the OpenText eDocs DM product and Visual Basic for assistance.

Chapter 4

Logging on to the Export Connector

Once you have installed the export connector and associated a document class with a batch class in TCReleaseConfig, you may specify the export connector to use when releasing your documents.

To log on to the export connector:

1. Start the TCReleaseConfig application and log on to the configuration of the TC/LINK-RS instance you need.
2. Open the **Release setups** tab and click the **Add** button.
3. In the **New Release Setup** dialog box, select the correct document class and select the "Kofax Export Connector 7.5 for OpenText eDocs DM." Click **OK**.
The New Release SetupDM Login Information dialog box is displayed as shown in [Figure 2](#).
4. Enter your DM library name, user name and password. This information will be used to log on to DM.

Note The Library Name combo box lists the default primary library and all available remote and independent libraries. If this is the first time you are logging on to the OpenText eDocs DM export connector, then this setting defaults to the primary library. The library name you choose is displayed in the title bar of the Kofax Export Connector 7.5 for OpenText eDocs DM 5.0-5.1 - Release Setup dialog box. See [Figure 3](#).

The OpenText eDocs DM export connector does not accept empty or NULL passwords. If you attempt to log on to DM without a password you will receive an error. (SPR 00011363)

The login information will be saved and used during release.

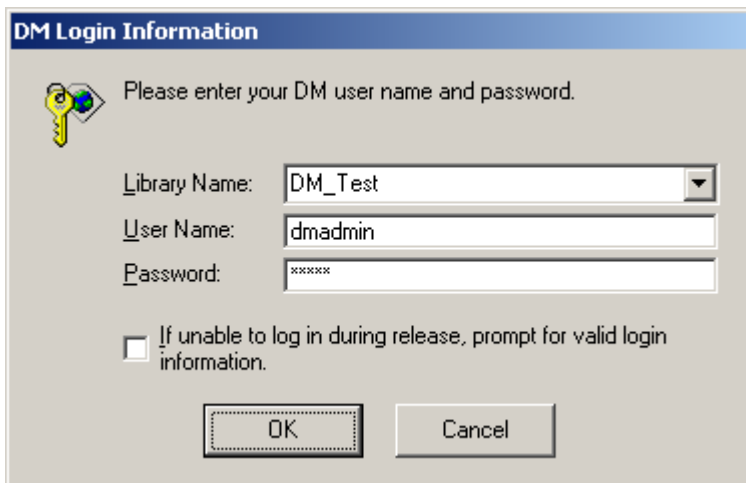


Figure 2. DM Login Information Dialog Box

5. Do not select **If unable to log in during release, prompt for valid login information**. Otherwise, the export connector will prompt for a user ID and password if it is not able to log in to DM at release time. As release is invoked by TC/LINK-RS (in a service and potentially without a user login session), such a prompt would be unrecognized and would cause problems.
6. Click **OK**. The Kofax Export Connector 7.5 for OpenText eDocs DM 5.0-5.1 — Release Setup dialog box is displayed, as shown in [Figure 3](#).

Ascent 7.0 Release Script for Hummingbird DM 5.0-5.1 - Release Setup [Library: DM_Test]

Batch Class: Standard
Document Class: FAX
Release Script Name:

Document Settings | Folder Settings | Security Settings | Image Format | General Settings

Profile:

DM Profile Attributes

Name	Value
Document Name*	{ \$Message ID }
Author*	"dmadmin"
Document Type*	"DEFAULT"
Description	"Fax message"
Type	
Entered By*	"dmadmin"
Application*	"DOCSIMAGE"
Mail ID	

Asterisk (*) denotes the attribute is required.

If Document Exists:
 Version document
 Create exception document
 Create new document

Keywords:
 Add new keywords to library
 Ignore keywords not in library

Retention: days

OK Cancel Apply Help

Figure 3. Kofax Export Connector 7.5 for OpenText eDocs DM 5.0-5.1 — Release Setup Dialog Box

7. See [Setting Up the Export Connector](#) for information about the setup options.

Chapter 5

Features

This section contains information about features provided with the Kofax Export Connector 7.5 for OpenText eDocs DM.

Release Values / DM Index Fields

The Kofax Export Connector 7.5 for OpenText eDocs DM provides an easy-to-use interface for linking Release Values to DM index fields. Examples of Release Values include Document index fields, Batch fields, Kofax Capture Values, and Text Constants.

TC/LINK-RS can provide fax metadata as Document index fields or Batch fields.

TC/LINK-RS also provides the document id, release data and time and the name of the TC/LINK-RS instance as Kofax Capture Values.

The names of "required" DM index fields are marked with an asterisk (*), giving you a visual indicator that certain fields must be linked.

DM Custom Constants

Allowed values for DM index fields defined in a DM profile are available for selection from the Kofax Export Connector 7.5 for OpenText eDocs DM 5.0-5.1 — Release Setup dialog box. This allows you to easily link DM custom constants to DM index fields.

Excluding DM Index Fields

If desired, you can exclude certain DM index fields from the list of fields to be linked during release setup. You do this by creating the ACFusion.INI file in the directory specified in registry value *HKLM\Software\Kofax Image Products\Kofax Capture\3.0\ServerPath*. (default location is C:\Program Files\Ascent).

See [Excluding DM Profile Attributes](#) for more information about excluding DM index fields.

Security

Options available with the OpenText eDocs DM export connector allow document access rights and folder access rights to be defined for selected DM groups and users during release setup. One example is that users can be granted access rights that allow the profile of a released document and/or user-defined folder to be edited.

See [Access to Documents and Folders](#) for more information about security options.

Versioning Options

The Kofax Export Connector 7.5 for OpenText eDocs DM supports two methods for versioning documents.

Version using Document Number Instead of the Document Name

This method allows you to version your documents using the OpenText eDocs DM document number. The document number is created by OpenText eDocs DM. This feature is available on the General Settings tab.

Note If you select this option, the following options will be unavailable on the Document Settings tab:

- Version document
- Create exception document
- Create new document

Version Document

This method allows you to version your documents using the document name.

DM Libraries and Profiles

When setting up the Kofax Export Connector 7.5 for OpenText eDocs DM, you can easily select the DM library and profile to use for releasing images. The Kofax Export Connector 7.5 for OpenText eDocs DM 5.0 – 5.1 – Release Setup dialog box honors access privileges defined for your OpenText eDocs DM users, and makes accessible only those libraries and profiles allowed for the logged in user. The OpenText eDocs DM export connector supports all libraries, including default, remote, and independent libraries.

German DM 5.1 Support

The Kofax Export Connector 7.5 for OpenText eDocs DM supports releasing to German OpenText eDocs DM version 5.1.

See [Releasing to Localized Versions of OpenText eDocs DM](#) for more information.

Keywords

For profiles that contain keyword fields, the OpenText eDocs DM export connector allows you to add one or more keywords to a document. You can also control how new keywords are handled. For example, you can create new keywords in the DM repository, or skip keywords not found in the indexed document.

Duplicate Documents

The Kofax Export Connector 7.5 for OpenText eDocs DM offers three options for handling duplicate documents. For example, you can specify that duplicate documents be:

- Created as new major versions to existing documents
- Created as exception documents, and given unique exception document names
- Created as new documents with the same name as the existing documents

Folder Support

The Kofax Export Connector 7.5 for OpenText eDocs DM displays folders from a selected library in a hierarchical tree view that provides an easy-to-use format for choosing the DM folder to select or create at release time. From the Kofax Export Connector 7.5 for OpenText eDocs DM 5.0-5.1 – Release Setup dialog box, you can add, rename, and delete user-defined DM folders that have not yet been created in the DM repository. Simply select a Kofax Capture Value or specify a text constant to find or create the DM folder.

Release to Records Management System

The Kofax Export Connector 7.5 for OpenText eDocs DM copies fax images and metadata into your DM repository. Optionally, you can release documents into your OpenText eDocs Records Management system.

For more information about releasing to Records Management, refer to the Help that is available with the Kofax Export Connector 7.5 for OpenText eDocs DM (Help keyword: Records Management).

Integrated Release Setup

The Kofax Export Connector 7.5 for OpenText eDocs DM provides an easy-to-use setup dialog box available from the TCReleaseConfig application. This dialog box allows you to specify release settings that control how documents are released into your DM repository.

See [Setting Up the Export Connector](#) for more information.

Online Help Available for Release Setup

Kofax Export Connector 7.5 for OpenText eDocs DM Help is installed with your export connector. It is available from the TCReleaseConfig application when you are setting up your export connector. You can click the Help button from the Kofax Export Connector 7.5 for OpenText eDocs DM 5.0-5.1 — Release Setup dialog box to display help information about release options.

Image Support

This export connector GUI offers the following file formats/compression formats. Please note that some formats are only available in a full Kofax Capture installation, but not with TC/LINK-RS.

Format	Supported by TC/LINK-RS
Multipage TIFF with Group 3, Group 3/2D, and Group 4 Compression	Yes
Multipage TIFF — Uncompressed	Yes
Multipage TIFF with JPEG Compression	No
JPG — JPEG Compression	Yes
Kofax PDF	No
Adobe PDF from TIFF	No
Adobe PDF from JPEG	No
Adobe PDF from PCX	No

Kofax PDF: Not Supported by TC/LINK-RS

The Kofax Export Connector 7.5 for OpenText eDocs DM offers image format Kofax PDF. Please note that TC/LINK-RS is not able to provide this image format.

Kofax PDF is bundled with Kofax Capture and is only available in a standard Kofax Capture installation.

Adobe Acrobat Capture PDF: Not Supported by TC/LINK-RS

The Kofax Export Connector 7.5 for OpenText eDocs DM offers several Adobe Acrobat Capture PDF conversion options, i.e. Adobe PDF from TIFF, Adobe PDF from JPEG and Adobe PDF from PCX. Nevertheless, these image formats are not supported with TC/LINK-RS.

They require software provided by Adobe Acrobat Capture, which is not included with the TC/LINK-RS product. It is part of the Adobe® Acrobat Capture® 3.04 Clustered or Personal Edition software.

Adobe Acrobat Capture PDF conversion has not been tested with TC/LINK-RS and is therefore not supported.

OCR Full Text: Not Supported by TC/LINK-RS

The current version of TC/LINK-RS does not provide OCR full text to the Kofax Export Connector 7.5 for OpenText eDocs DM. Support of textual data is planned for future releases though.

eDocument Support

The current version of TC/LINK-RS does not provide eDocuments to the Kofax Export Connector 7.5 for OpenText eDocs DM.

Chapter 6

Additional Information

This section contains additional information about the Kofax Export Connector 7.5 for OpenText eDocs DM.

Access to Documents and Folders

If you create documents and folders with no security settings at release setup, the documents and folders will only be available for you to edit. This means that your released documents and user defined folders are protected and can only be accessed by you. If you want certain DM groups and users to have access to your documents and folders, you must use the Security Settings tab to assign access privileges to your documents and folders.

For more information about the Security Settings tab, refer to the Help available with the Kofax Export Connector 7.5 for OpenText eDocs DM (Help keyword: Security Settings tab).

Warning If you create documents with no security settings and place it in a folder with security settings, the documents will automatically inherit the permissions that you set for the folder.

Context Menu Removed From the Folder Hierarchy

In the Kofax Export Connector 7.5 for OpenText eDocs DM, the context menu has been removed from the folder hierarchy on the Folder Settings tab. This means that a context menu will no longer be displayed when you right-click on any DM folder in the folder hierarchy to add, delete, or rename a folder. To successfully add, delete, or rename a DM folder, use the Add Folder button, Delete Folder button, or Rename Folder button on the Folder Settings tab.

Note that the right mouse button will now behave like the left mouse button. You can right-click or left-click on a DM folder in the folder hierarchy to select the folder.

Refer to the Help available with the Kofax Export Connector 7.5 for OpenText eDocs DM for more information about adding, deleting, or renaming DM folders in the Folder Settings tab (Help keyword: Folder Settings tab).

OpenText eDocs DM Extensions API Patch

When you install the OpenText eDocs DM API on a OpenText eDocs DM server containing the OpenText eDocs DM Extensions API (Hummingbird DM API 5.0 with Patch 5 or Hummingbird DM API 5.1 with

Patch 1), the Hummingbird DM export connector will not be able to run side-by-side with the DOCSFusion 5.0 export connector or Hummingbird DM 5.1 export connector. The patch for the Hummingbird DM Extensions API alters the Hummingbird DM API registry key.

In addition, if you install the patch directly to a release workstation, the Hummingbird DM export connector will not be able to run side-by-side with the DOCSFusion 5.0 export connector or Hummingbird DM 5.1 export connector.

Hummingbird DM Projects

The Kofax Export Connector 7.5 for OpenText eDocs DM does not support projects. In addition, the export connector will not upgrade existing projects to folders during the upgrade process. Therefore, we recommend that you use the OpenText eDocs DM Folder Conversion Utility provided by OpenText eDocs that converts your projects into folders. The conversion utility will replace all your projects with folders in the Hummingbird DM repository. For more information on the conversion utility, refer to your OpenText eDocs DM Suite Installation Guide.

Due to a limitation with the OpenText eDocs DM Folder Conversion Utility, you will not be able to directly view a document in the last converted folder in a hierarchy of converted folders. (Hummingbird case number 375239; Kofax SPR 29388)

OpenText eDocs DM User Permissions

The Kofax Export Connector 7.5 for OpenText eDocs DM 5.0-5.1 – Release Setup dialog box honors access permissions defined for your OpenText eDocs DM users, and makes accessible only those profiles allowed for the logged in user. You can easily set the user profiles from the Permissions tab on the OpenText eDocs Group Maintenance dialog box. We recommend that you set the following fields to “Yes” for the user you specified at release setup to create and remove folders on the OpenText eDocs DM server.

- **Can Create New Documents:** allows the user to create documents
- **Can Create Folders:** allows the user to create folders
- **Can Create/Remove Public Folders:** allows the user to create and remove public folders.

For more information about the Hummingbird DM user permissions, refer to the documentation that came with your OpenText eDocs DM product.

Application and Document Type Fields

When you are creating a user-defined folder for release, the Application and Document Type folder profile attributes must be set to “FOLDER,” which is the default choice. If you attempt to change this value, you will receive an error message at release and the value will be returned to “FOLDER.”

Releasing to Records Management

If you are releasing to Records Management via the Kofax Export Connector 7.5 for OpenText eDocs DM, make certain that you have the following items set in the link control when you want your documents to be released into Records Management as records:

- The Code field is set to a text constant containing the File Part Number (for example, "2002/1(A)")
- Item Type field for released documents is set to "Document"
- The Type field is set to "Keep"
- The Document Type field is set to "RM"

To release to Records Management, check the "Mark document as a record for Records Management" check box on the General Settings tab, and select a Records Management profile form from the Profile drop-down list on the Document Settings tab. Then, leave the Item Type unlinked.

Note If you specify an Item Type of Record, File, or Box, the following error will occur and release will fail. "An error occurred while releasing the document <document name> to the Records Management system. 9519."

Search Criteria for Duplicate Folders

If the "Create new folder" option is selected on the Folder Settings tab, a new folder will be created as long as the Kofax Export Connector 7.5 for OpenText eDocs DM does not find a duplicate folder. The export connector classifies a duplicate folder as an existing folder with the same name, same profile, same public setting, and exists in the same parent (library or folder).

If a duplicate folder is found that satisfies the above criteria, then that folder is used for releasing documents. The attributes for the duplicate folder are not updated and will not be used at release.

DM Check Box Attributes Requires Numeric Values

The OpenText eDocs DM export connector allows you to establish links between DM index fields and Release Values. However, the DM check box data type only accepts numeric string values. You must use "1" for a checked value and any other numeric string value for an unchecked value (for example, "0" or "2").

Note The numeric values must be in quotation marks.

Releasing to Localized Versions of OpenText eDocs DM

When you are releasing to German OpenText eDocs DM version 5.1, the Kofax Export Connector 7.5 for OpenText eDocs DM requires an INI file containing localized table names. You must create a file "DMTables.INI" in the directory specified in registry value

HKLM\Software\Kofax Image Products\Kofax Capture\3.0\ServerPath (default location is C:\Program Files\Ascent).

The INI file must contain a section named “[Table Names]” followed by the localized table names. The following information must be entered into the “DMTables.INI” file:

```
[Table Names]
DOC_FORMS=DEU_FORMS
DOC_PEOPLE=DEU_PEOPLE
DOC_GROUPS_ENABLED=_DEU_GROUPS_ENABLED
DOC_KEYWORD=KEYWORD
```

Where:

[Table Names] is the section name and each subsequent line refers to a localized table in OpenText eDocs DM. The INI file name, section name, and table names are not case sensitive.

If you do not create the DMTables.INI file and attempt to login to the German OpenText eDocs DM export connector, login will fail with an error message similar to the following:

```
The retrieval query did not return results.
```

Important Warning The third table name (DOC_GROUPS_ENABLED) requires an underscore prior to the localized prefix. The fourth table name (DOC_KEYWORD) may not require a localized prefix.

Notice that if you attempt to use the INI file on an English system, you will receive an error. This happens because the table names expected by the OpenText eDocs DM export connector do not match the actual names on the OpenText eDocs DM server. You will receive the following error message on the English system:

```
Runtime error. <DM ServerName>: <DM Server Name> Your search was unsuccessful.
```

Excluding DM Profile Attributes

The DM index fields defined for a profile will display in the DM Profile Attributes area on the Document Settings tab and Folder Settings tab. If desired, you can prevent one or more of the DM index fields from displaying in the list.

To do so, you must create a file named ACFusion.INI in the directory specified in registry value *HKLM\Software\Kofax Image Products\Kofax Capture\3.0\ServerPath* (default: C:\Program Files\Ascent).

To create the ACFusion.INI file:

1. From Windows Explorer, select Program Files | Ascent.
2. On the File menu, click New and then Text Document.
3. Rename the file to ACFusion.INI.
4. Right-click the ACFusion.INI file in the Ascent folder, and select “Open with” from the context menu. Use any text editor to edit this file.
5. Insert a section heading titled [Profile Display Names]. This section heading lists the column names to exclude from display. Columns are derived from the SQL column attributes.
6. Add the desired column names. The DM profile fields for the column names that you list will not display in the DM Profile Attributes area on the Document Settings tab and/or Folder Settings tab.

7. Save the file.

Note

- When you first log on to release setup, the following warning message is displayed for each DM index field that you excluded: “Cannot find the DM attribute <attribute> in the profile form <profile>. The link will be removed.” Click OK to acknowledge the removal of the DM index field.
- If any required DM index fields are listed in the ACFusion.INI file, a warning message will display at release setup time, and the required fields will display in the DM Profile Attributes area. Consequently, you cannot hide required fields. As a result, Kofax Capture Values can be linked to all required DM index fields.

Each line listed under [Profile Display Names] specifies one column name to exclude. For example:

```
Sequence number=Column name
```

Where:

- Sequence number is a unique incrementing number that identifies the line in the [Profile Display Names] section.
- Column name is the name of the DM profile attribute as it is known in the DM repository.

In the ACFusion.INI file, each line under the section heading must conform to the required format. A sample of an ACFusion.INI file is shown below.

```
[Profile Display Names]
1=CREATION_DATE
2=CREATION_TIME
3=PROCESS_DATE
```

Note The list of excluded index fields is selected at release setup; it is clear at release. All linked index fields will be released.

Sharing Data Among Export Connectors

The Kofax Capture Export Connector Information Interchange feature is useful when more than one export connector has been configured for a particular batch class and document class combination.

The sharing of information is accomplished by allowing the export connector to pass information to other export connectors. The Kofax Capture Value {Repository Document ID} is used to store and retrieve the RepositoryDocumentID that will be used by the first invoked export connector. Therefore, the first export connector that runs can set this value, and subsequent export connectors can read the same value.

Notice that when you are passing the RepositoryDocumentID information to a different export connector, the export connector must exist within the same document class using multiple release. In addition, the export connector that is passing the RepositoryDocumentID information must be placed first in the list on the Export Connectors dialog box. In addition, the export connector that is passing the RepositoryDocumentID information must be the first that is assigned to a user. For example:

- Kofax Export Connector 7.5 OpenText eDocs DM 5.0-5.1
- Kofax Capture Text

Only the first export connector can set the RepositoryDocumentID value. Subsequent export connectors can only read this value.

Chapter 7

Setting Up the Export Connector

This chapter describes the setup options available with the Kofax Export Connector 7.5 for OpenText eDocs DM.

Note For more details about the setup options, refer to the Help available from the Kofax Export Connector 7.5 for OpenText eDocs DM 5.0-5.1 — Release Setup dialog box.

Document Settings Tab

This tab allows you to select from a list of available DM profile attributes, and link Kofax Capture Values to DM index fields. Please specify a meaningful name for the release setup (default is NewSetup).

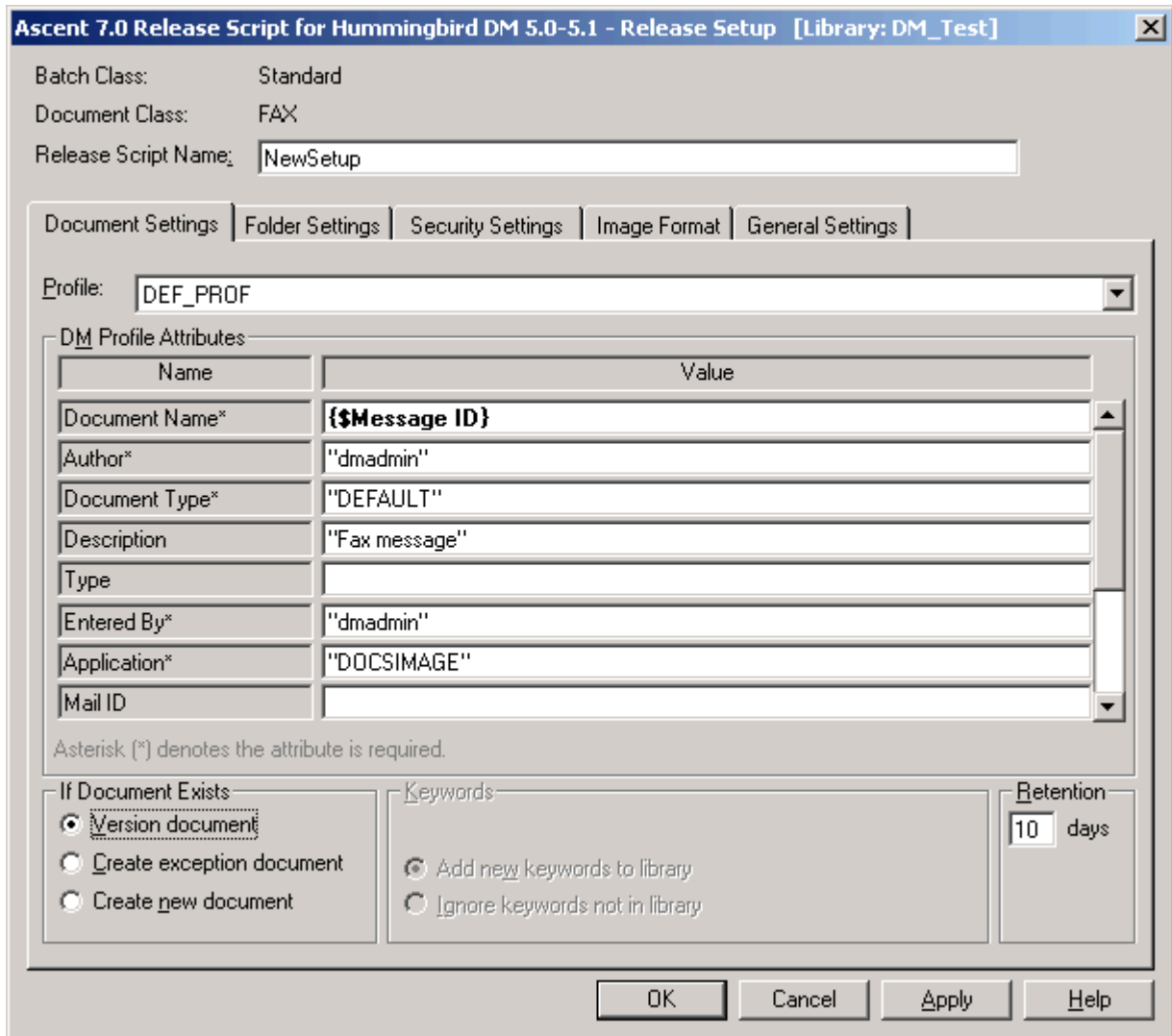


Figure 4. Document Settings Tab

Folder Settings Tab

This tab allows you to specify or create a DM folder location for your released documents. At release, the released documents will be linked to the selected folder.

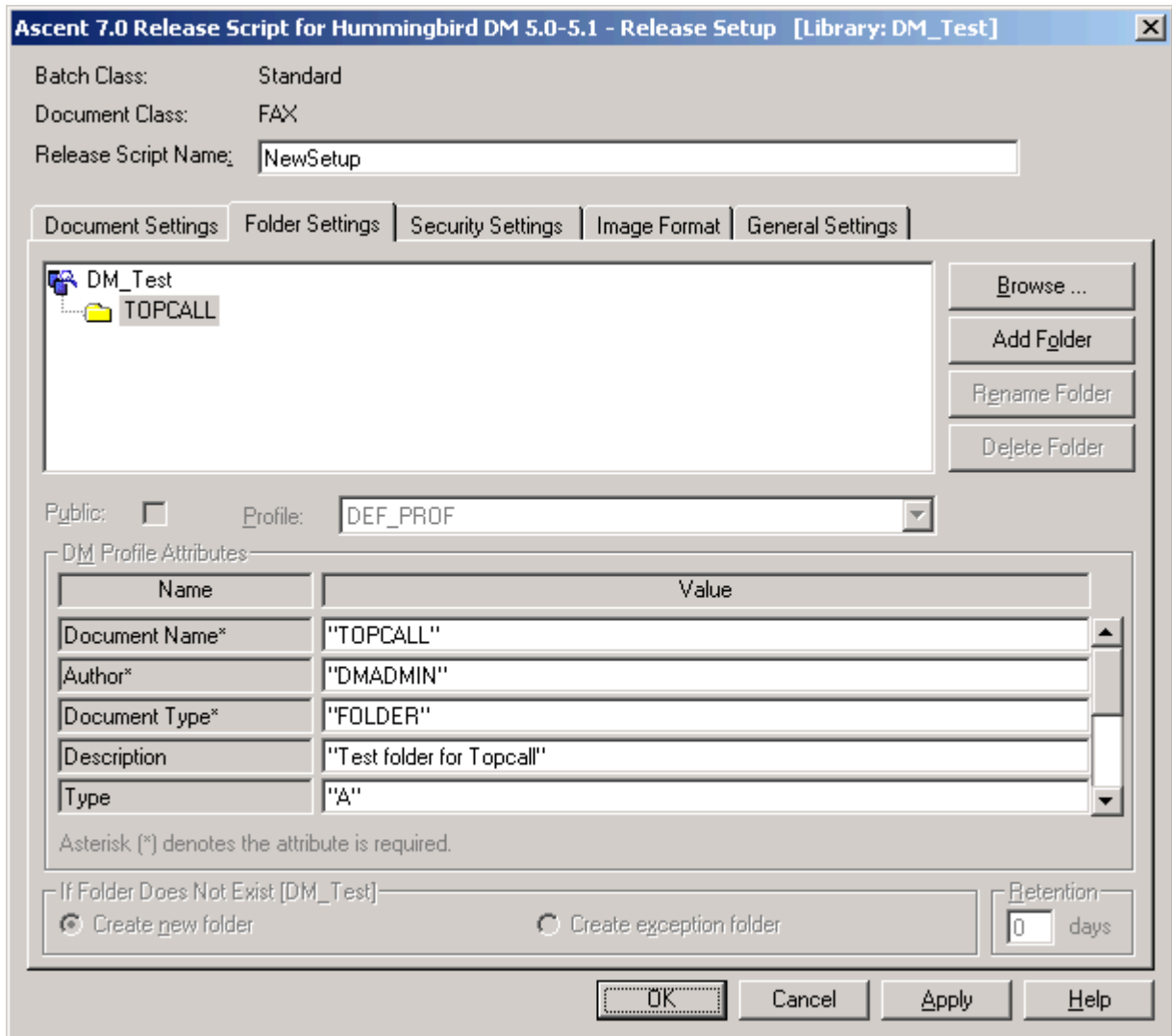


Figure 5. Folder Settings Tab

Security Settings Tab

The options on this tab allow you to specify which DM groups and users will have access to the released documents and/or user-defined folders. In addition, you can specify the profile access rights for the selected DM groups and users.

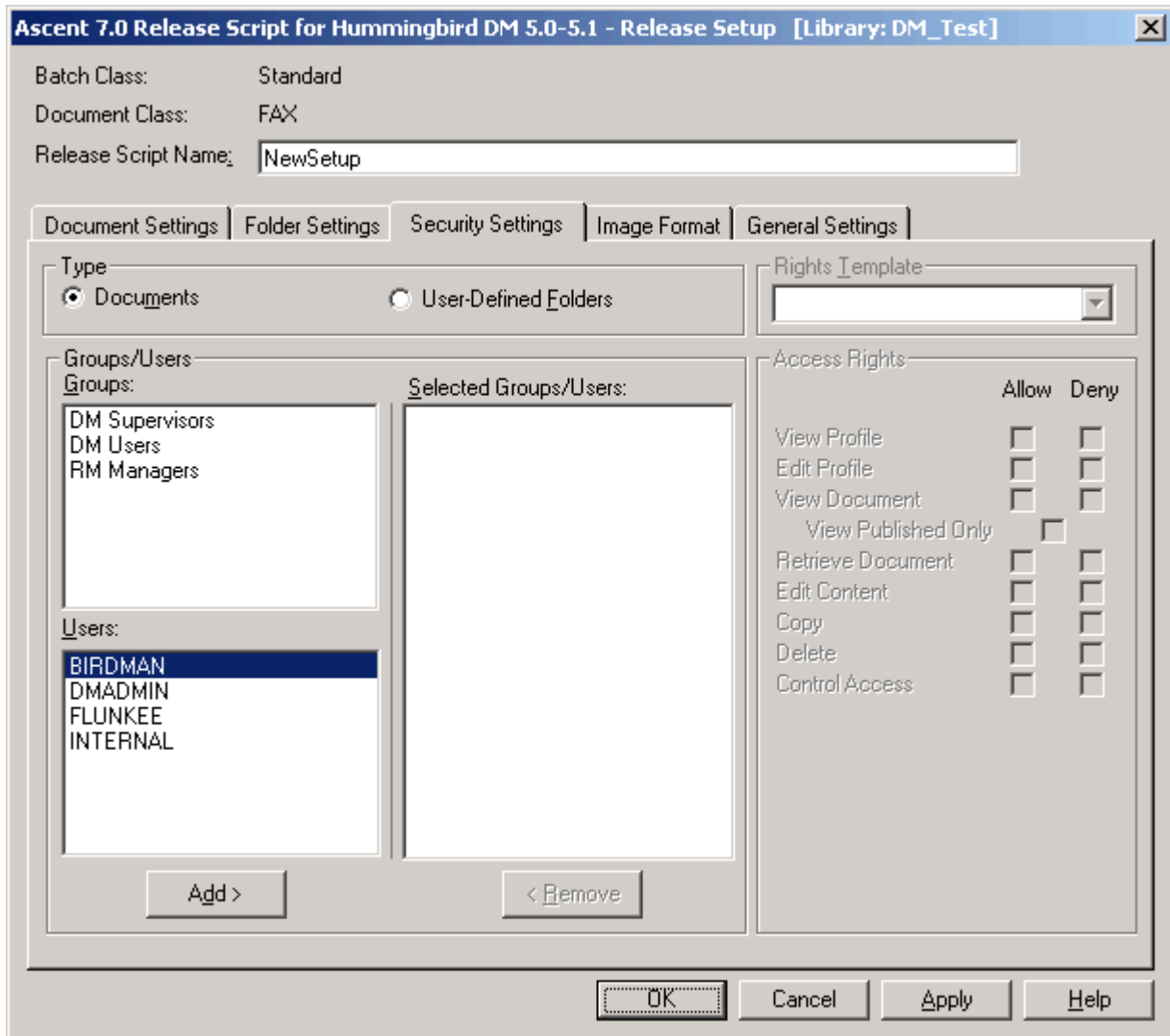


Figure 6. Security Settings Tab

Image Format Tab

This tab allows you to specify the desired image formats for releasing your images. You can specify a primary format and a secondary format. If Adobe PDF is selected as an image format, the PDF Settings on this tab will become available for selection.

Note

TC/LINK-RS does not support some formats offered in this tab, including the Adobe PDF formats. See [Image Support](#) for more information about supported image formats.

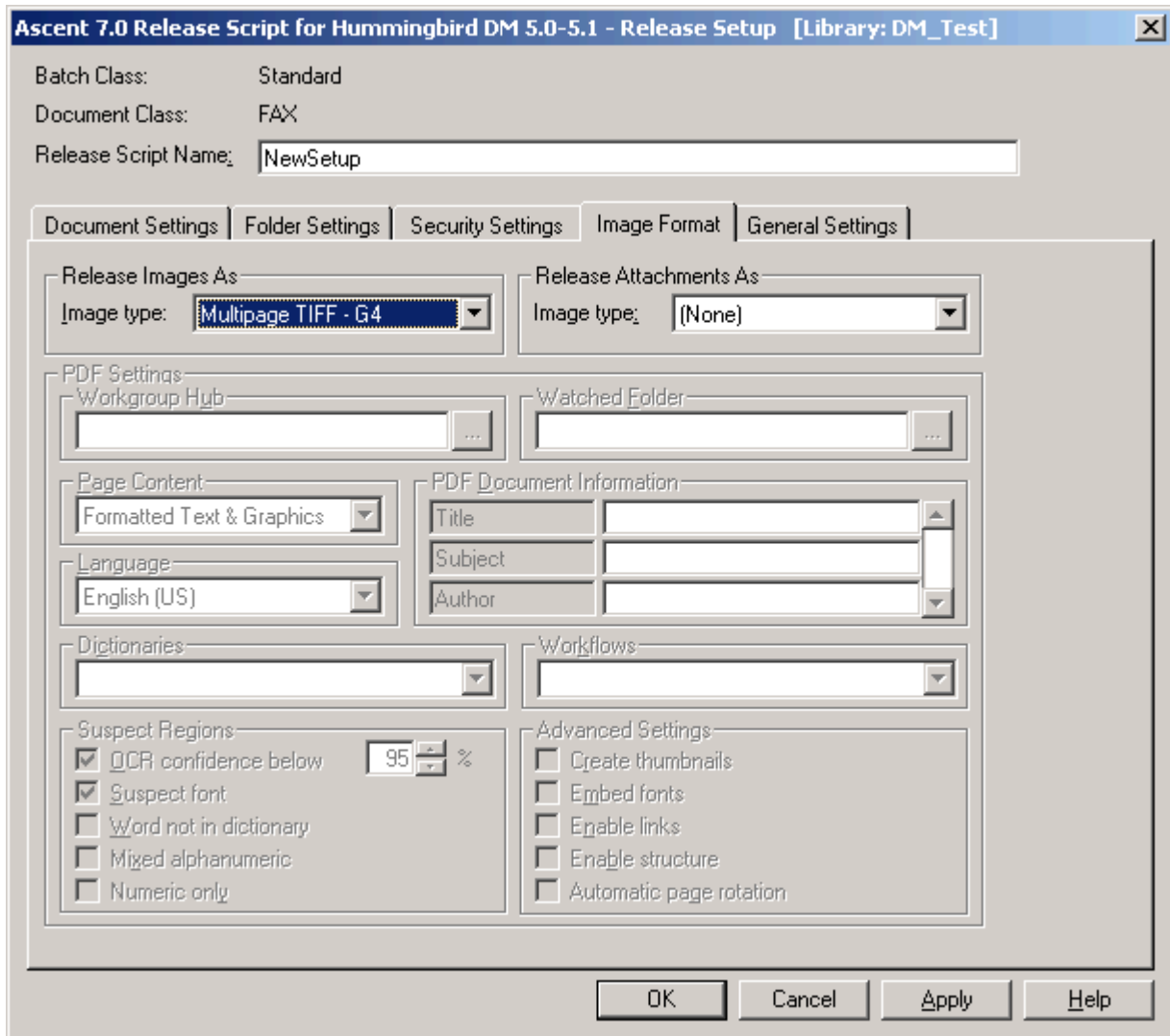


Figure 7. Image Format Tab

General Settings Tab

This tab allows you to specify a temporary storage location to be used at release time, and specify whether to skip the first page of each document at release. Skipping the first page is supported with TC/LINK-RS, although it does not make much sense for fax messages.

In addition, you can specify whether the released document will be released directly to the DM Records Management system, publish new documents to the library, enable content searching (not supported with current TC/LINK-RS version), and version a document using the document number.

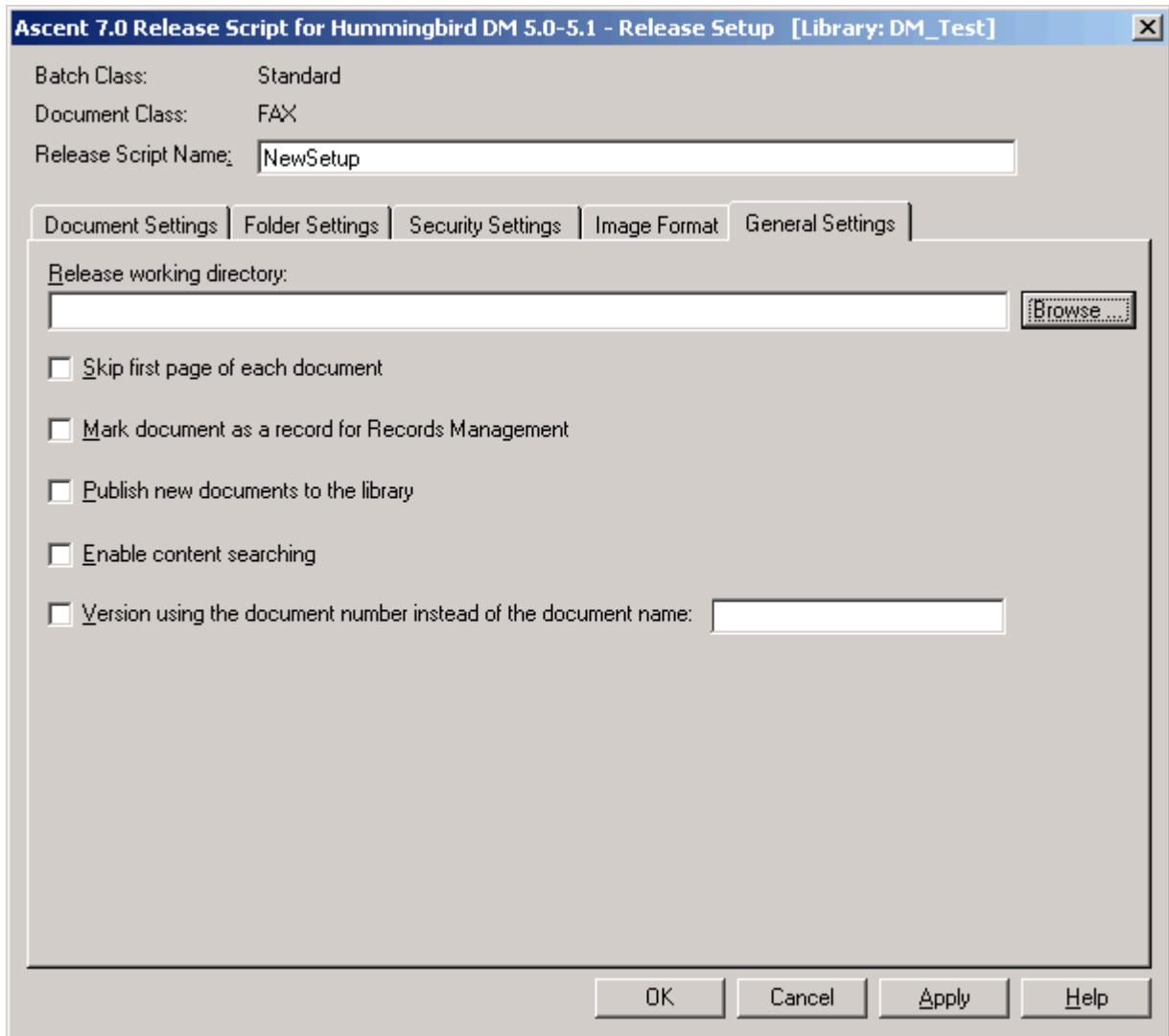


Figure 8. General Settings Tab

Save Release Setup: Warnings About Unused Fields

When saving the release setup configuration, the script displays warning messages if not all Kofax Capture Values (index fields, batch fields) have been linked to DM index fields. You can ignore these messages.

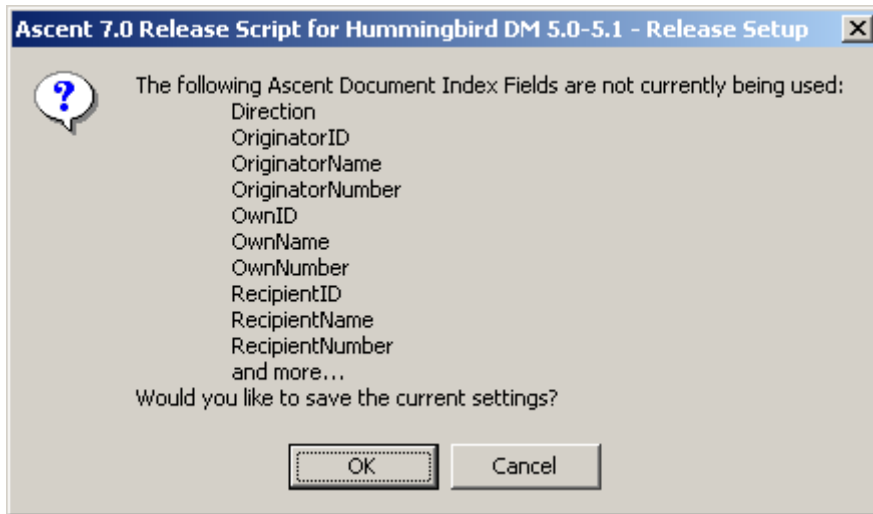


Figure 9. Warning Message

Activating a Configuration

To activate a release setup configuration, you must assign it to a TCOSS user or (for global use) to a fax channel group on the TCOSS server. Additionally, you must define events that route messages to TC/LINK-RS.

Both steps are done via the TCReleaseConfig application and are described in detail in the TC/LINK-RS manual. This section contains step-by-step description in brief.

1. Select the release setup in the **Release setups** tab of TCReleaseConfig and click **Assign**.
The **Assignments** dialog box is displayed.
2. Type in or search for the name of the TCOSS user whose fax messages shall be released via this configuration. Click **Add** to add the name to the user list. Then click **OK**.
The **Assignment status** window opens.
3. If there is no event defined for the user, create an event - on the context menu item, select **Create event**, set the event status to **Enabled** and click **OK**.
4. Send some sample messages to test the operation of the export connector. The way of sending the test messages depends on the event type:
 - To use the Inbound Release event of a user, send a fax to the user's fax number.
 - To use the Outbound Release event of a user, log in to TCFW as this user, and compose and send a message to an external fax number.
5. Make sure the TC/LINK-RS is active.
The event messages are routed to the TC/LINK-RS message queue, and TC/LINK-RS invokes the export connector.
6. Check the resulting documents on the OpenText eDocs DM server.

Chapter 9

Application Maintenance

This application can be repaired or uninstalled as a standard Windows application.

Note After uninstalling, the Kofax Export Connector 7.5 for OpenText eDocs DM will continue to display in the TCReleaseConfig application, although it will not be functional. To remove the export connector from the list, select the applicable export connector from the Release scripts panel in TCReleaseConfig and click Delete.

Chapter 10

Known Problems

This section contains information about known problems with the Kofax Export Connector 7.5 for OpenText eDocs DM.

Problems When Installing on Windows XP

If you are installing the Kofax Export Connector 7.5 for OpenText eDocs DM on a Windows XP Professional workstation and you specify a mapped drive, you will receive the following error message. (SPR 31250)

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

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

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

Problems When Uninstalling the Export Connector

If you click the Cancel button while you are uninstalling the export connector, all the export connector original files will remain properly installed on the system. However, depending on the point during the uninstallation that the Cancel button is clicked, the export connector may be un-registered. In such a case, once you attempt to log on to the export connector, login will fail. (SPR 31221)

Workaround: If this problem occurs, run Repair. Refer to *Repairing the Export Connector* for more information.

Uninstalling the DMRel Folder

Uninstall does not remove the DMRel folder when using Add or Remove Programs utility. If you want to completely uninstall the DMRel folder from your workstation, you must manually delete the folder. (SPR 28017)

Blank Passwords Are Not Supported

The OpenText eDocs DM export connector does not support using a blank or NULL password when logging on to the export connector. You will receive the following error message when you attempt to log on to the export connector. (SPR 00011363)

```
The release script could not log you on. Please make sure that your library name, user name, and password are correct. In addition, make sure that the Caps Lock is not accidentally turned on.
```

Document Released to Last Converted Folder is Not Viewable

Due to a limitation with the OpenText eDocs DM Folder Conversion Utility in version 5.0, you will not be able to directly view a document in the last converted folder in a hierarchy of converted folders. In other words, if you use the Conversion Utility to convert nested projects into folders, you will not be able to view the document in the last converted folder. When you try to open the converted folder, you will receive the following error message. (Hummingbird case number 375239; Kofax SPR 29388)

```
80040341
```

Workaround: Use the Hummingbird Windows Explorer DM Extension 5.0 to locate the document. From this application, highlight the document and then click the “Where Used” tab. This tab will display the folder that is linked to the document.

Note This problem has been fixed with Hummingbird DM 5.1.

Deleting Last Remaining Folder from the OpenText eDocs DM Server

The export connector does not allow you to delete the last remaining folder in the folder hierarchy from the Folder Settings tab. Therefore, if you delete this folder from the OpenText eDocs DM server, you will receive a warning message when you return to release setup. Although this folder has been deleted from the OpenText eDocs DM server, the folder name will still appear in the folder hierarchy in release setup. In addition, the Browse button will be disabled since there are no existing folders on the OpenText eDocs DM server. (SPR 30356)

Workaround: Replace or recreate the deleted folder on the OpenText eDocs DM server. Another option is to recreate the export connector settings.

Duplicate “Billable” Attributes in the LAWPROF Profile

If you have generated new libraries based on the OpenText eDocs “Legal” template, you will automatically have a “LAWPROF” profile that may be specified in the Document Settings tab and Folder Settings tab. This profile has a duplicate “Billable” attribute, which is a hidden object and is not displayed in the normal

design view. This minor problem has been reported to Hummingbird and will likely be resolved in a future Hummingbird DM Patch. (SPR 00011020).

If this presents a problem, your DM system administrator can use the DM Designer application to resolve the problem. To view the hidden profile attributes, click “Show Hidden Objects” from the Edit menu. Then, remove the duplicate “Billable” attribute and save the profile. Notice that it may be necessary to refresh the OpenText eDocs DM server and DM client before the update displays in the OpenText eDocs DM export connector.

Duplicate Folders with Public Settings

At release setup, you can enable the “Public” check box for a user-defined folder, which is available from the Folder Settings tab. When this option is enabled, it allows all users to view, edit, create, or delete a user-defined DM folder.

Public Setting Creates Duplicate Folders

Duplicate folders may be created with the Public check box enabled in release setup. This can be resolved via a configuration change on the OpenText eDocs DM server. (SPR 30869)

Workaround: Do the following:

1. Open Library Maintenance on the OpenText eDocs DM server.
2. Click the Groups icon and double-click the group for the user account used in release setup.
3. Select the Permissions tab and set the following permissions:
 - Can Create New Documents = Yes
 - Can Create Folders = Yes
 - Can Create/Remove Public Folders = Yes
4. Close Library Maintenance.
5. Refresh the cache on the OpenText eDocs DM server.
6. If Windows Explorer DM Extension is running on the client, be sure to close the application before releasing the next batch.

Changing Public Setting on OpenText eDocs DM Server

If you change the public setting to non-public or vice versa on the OpenText eDocs DM server, this setting will not change on the Folder Settings tab. At release, the user-defined folder will retain the settings from the Folder Settings tab and the OpenText eDocs DM server. Although no error messages are given, the release will create two folders (a public folder and a non-public folder) using identical batch names. (SPRs 29329 and 29330)

Workaround: To ensure that duplicate folders are not created at release, we recommend that you only change the public setting on the Folder Settings tab.

Non-Public Folder Created When the Public Check Box Selected

Note This problem applies to OpenText eDocs DM 5.0.

If you have not been granted access rights on the OpenText eDocs DM server to create a public folder, the export connector will automatically create a non-public folder at release. This problem is more evident when the following permissions are set on the OpenText eDocs DM server. (SPR 30357)

- Can Create New Documents = Yes
- Can Create Folders = Yes
- Can Create/Remove Public Folder = No

Workaround: If this problem occurs, adjust the user permissions on the OpenText eDocs DM server by setting the Can Create/Remove Public Folder field to “Yes” for the user you specified at release setup to create and remove folders on the OpenText eDocs DM server.

Public Folder Created Without Permissions

Note This problem applies to OpenText eDocs DM 5.1.

If you have not been granted access rights on the OpenText eDocs DM server to create a public folder, the export connector will still create a public folder at release. (SPR 30876)

Workaround: None. Do not select the Public check box at release setup if the user belongs to a group that does not have permissions to create public folders.

Select a Version Dialog Box Displays During Release

If you have enabled the “Publish new documents to the library” check box on the General Settings tab and release, the “Select a Version to Publish” dialog box will display. This dialog box will display each time a document is to be published, and you will need to click the OK button each time this dialog box is displayed. Therefore, if you are releasing ten documents, this dialog box will display ten times. (Hummingbird case number 377909; Kofax SPRs 29874 and 30665)

Workaround: If this occurs, your DM system administrator can adjust the Group Versions settings on the OpenText eDocs DM server by setting the “Always Display Version Selection List” drop-down list box to “No.”

Possible Memory Leak When Releasing Documents

When releasing a large number of documents to an existing folder, you may experience a possible memory leak. In this case, you will notice that the system performance will be considerably slower. The

problem is more evident on a system where system resources are low. (Hummingbird case number 384571; Kofax SPR 31312)

Workaround: If you experience low virtual memory, shut down the TC/LINK-RS workstation and restart it.

Visit the website at www.hummingbird.com or contact your OpenText eDocs representative.

Customizing a OpenText eDocs Profile Form

When customizing a OpenText eDocs profile form, you must add the FULLTEXT attribute to the form. When the FULLTEXT attribute is set, the OpenText eDocs DM server will index documents. If you do not add this attribute to the OpenText eDocs profile, the release will fail with the following error message. (SPR 30769)

```
[-2147221032 NYPSSVR3: You have supplied an invalid property value.: =  
FULLTEXT:X9748\CLIENT ID\X8809 = 1\1\ (-2147221032)
```

Workaround: Add the FULLTEXT attribute to the OpenText eDocs profile form. Notice that this attribute is normally labeled “Enable Content Searching” in the DEF_PROF profile.

Multiple Release Problems

The following sections describe a couple of known multiple release problems.

Using Duplicate User Names

If you attempt to run multiple DM release setups from one workstation using different user names, the export connector will use the login properties from the last logged in user. (SPR 00011500)

Releasing Documents with Multiple Release

If you run multiple DM release setups from one workstation and release documents to folders, the first document will always release to the correct folder in each export connector. However, the remaining documents will not release to the correct specified folder. The folder that released last will receive all the remaining documents. (SPR 00011607)

For illustration, let’s say that you are releasing the following:

Release Setup	Folder	Documents
RS1	Existing A	docA1 docA2 docA3
RS2	Existing B	docB1 docB2 docB3

Release Setup	Folder	Documents
RS3	Existing C	docC1 docC2 docC3

When you run multiple DM export connectors and release documents to folders, the following will occur:

Release Setup	Folder	Documents
RS1	Existing A	docA1
RS2	Existing B	docB1
RS3	Existing C	docA2 docA3 docB2 docB3 docC1 docC2 docC3