Kofax Export Connector for Documentum Content Server
Administrator's Guide

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KOFAX

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Administrator's Guide

This document gives you information about installing and configuring Kofax Export Connector for Documentum Content Server, which exports document images, OCR Full Text files, PDF documents, eDocuments, and data to a Documentum Server repository.

Overview

With Kofax Export Connector for Documentum Content Server, batches are processed based on export settings. Documents and index data are exported to your repository based on the settings defined during export setup.

In a multiuser installation, the export process typically runs on an unattended workstation that polls for available batches at regular intervals. The process may be configured to run during off-hours to avoid any impact to the performance of Kofax Capture, Kofax TotalAgility, Kofax Express, or the network system.

Features

This section describes the primary export connector features.

Limit the number of folders

Using a setup configuration file, you can limit the number of Documentum Server folders retrieved from the server. The limitation is useful if a very high volume of folders reside on the server.

To limit the number of folders retrieved, use SetupConfig.xml in your installation folder to set the value of the LimitedFolderQueryNumber field to an integer value. For example, set the value to 50 to retrieve 50 folders:

```xml
<?xml version="1.0"?>
<Config xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance"
 xmlns:xsd="http://www.w3.org/2001/XMLSchema">
<LimitedFolderQueryNumber>50</LimitedFolderQueryNumber>
</Config>
```

Kofax values/ Documentum Content Server properties

This export connector provides an easy-to-use interface for linking Kofax Values to document properties and folder properties. Examples of Kofax Values include document index fields, folder index fields, batch fields, and text constants.

Image support

This export connector supports the following file formats/compression formats:
- Multipage TIFF with Group 3, Group 3/2D, and Group 4 Compression
- Multipage TIFF - Uncompressed Image Format
- Multipage TIFF with JPEG Compression
- Kofax PDF

Kofax PDF support

You can export Kofax PDF documents into your Documentum Server repository. Kofax PDF is included with Kofax Capture or Kofax Express and does not require additional software implementation. Kofax PDF documents can be saved in the following output types:
- Image Only
- Image and Text

OCR Full Text support

You can export documents processed through the Kofax Capture OCR Full Text module into your Documentum Content Server repository.

eDocument support

You do not need to limit your batches to image files. eDocuments are supported for export into Documentum Content Server.

Product documentation

The Kofax Export Connector for Documentum Content Server documentation set is available online at the following URL [1]

https://docshield.kofax.com/Portal/Products/KEC_Documentum/8.2.0-qia1ime9gg/KEC_Documentum.htm

The full documentation set includes the following items:

Kofax Export Connector for Documentum Content Server Release Notes
Contains late-breaking product information not included in other product documentation.

Kofax Export Connector for Documentum Content Server Technical Specifications
Contains information on supported operating systems and other system requirements.

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[1] You must be connected to the Internet to access the full documentation set online. For access without an Internet connection, see "Offline documentation."

Kofax Export Connector for Documentum Content Server Administrator's Guide
Contains information for administrators who are responsible for installing, configuring and maintaining Kofax Export Connector for Documentum Content Server.

Kofax Export Connector for Documentum Content Server Help

Describes the configuration settings required to set up the Kofax Export Connector for Documentum Content Server.

Offline documentation

To make the documentation available for use in offline mode, obtain the documentation files from the Kofax Export Connector 8.2.0 for Documentum Content Server product package that you downloaded from the Kofax Fulfillment Site. The product package includes the following documentation files for offline use:

- KofaxExportConnectorDocumentation_8.2.0_forDocumentumContentServer_EN.zip

  Contains the entire product documentation set in English.
- KofaxExportConnectorDocumentation_8.2.0_forDocumentumContentServer_JA.zip

  Contains the entire product documentation set in Japanese.

For each language, the .zip file includes two folders:
- The **print** folder: Contains the *Kofax Export Connector for Documentum Content Server Administrator's Guide*
- The **help** folder: Contains *Kofax Export Connector for Documentum Content Server Help*

  1. After you install Kofax Export Connector 8.2.0 for Documentum Content Server, in the product installation folder, create the folder named **Documentation**.

  2. In the newly created **Documentation** folder, create the language code folders for the required languages:
     - For English, create the folder named **EN**
     - For Japanese, create the folder named **JA**

  3. Extract the contents of the documentation compressed file for the language you require to the following location:
     - For Kofax Capture:
       ```
       [drive:]\Program Files (x86)\Kofax\Capture\ServLib\Bin
       \Kofax.Documentum.8\Documentation\<language code folder> or
       ```
       ```
       [drive:]\Program Files (x86)\Kofax\CaptureSS\ServLib\Bin
       \Kofax.Documentum.8\Documentation\<language code folder>
       ```
     - For Kofax TotalAgility:
       ```
       [drive:]\Program Files (x86)\Kofax\TotalAgility\ExportConnectors\bin
       \Kofax.Documentum.8\Documentation\<language code folder>
       ```
     - For Kofax Express:
       ```
       [drive:]\Program Files (x86)\Kofax\Kofax Express\bin
       \Kofax.Documentum.8\Documentation\<language code folder>
       ```

> ℹ The Documentation folder is not removed automatically in case the product is uninstalled, and you need to delete it manually.

4. Start the Kofax Export Connector for Documentum Content Server application and click the Help icon to open the help in a separate browser window.

To use the PDF documentation offline, you can keep it in the **Documentation** folder or a different location on your computer. The **help** folder should always remain in the **Documentation** folder. When the offline documentation is installed according to these instructions, the product will use the offline version of the documentation by default, even if an active Internet connection exists.

Training

Kofax offers both classroom and computer-based training that will help you make the most of your Kofax solution. Visit the Kofax Education website for complete details about the available training options and schedules.

Getting help with Kofax products

The Kofax Knowledge Portal repository contains articles that are updated on a regular basis to keep you informed about Kofax products. We encourage you to use the Knowledge Portal to obtain answers to your product questions.

To access the Kofax Knowledge Portal, go to https://knowledge.kofax.com.

> ℹ The Kofax Knowledge Portal is optimized for use with Google Chrome, Mozilla Firefox, or Microsoft Edge.

The Kofax Knowledge Portal provides:
- Powerful search capabilities to help you quickly locate the information you need.

  Type your search terms or phrase into the **Search** box, and then click the search icon.
- Product information, configuration details and documentation, including release news.

  To locate articles, go to the Knowledge Portal home page and select the applicable Solution Family for your product, or click the View All Products button.

From the Knowledge Portal home page, you can:
- Access the Kofax Community (for all customers).

  On the Resources menu, click the **Community** link.
- Access the Kofax Customer Portal (for eligible customers).

  Go to the Support Portal Information page and click **Log in to the Customer Portal**.
- Access the Kofax Partner Portal (for eligible partners).

  Go to the Support Portal Information page and click **Log in to the Partner Portal**.
- Access Kofax support commitments, lifecycle policies, electronic fulfillment details, and self-service tools.

  Go to the Support Details page and select the appropriate article.

System requirements

The primary source of information about system requirements and dependencies on other products is the Technical Specifications document, which is available on the Kofax Export Connector for Documentum Content Server product documentation page. The Technical Specifications document is updated regularly, and we recommend that you review it carefully to ensure success with your export connector product.

DFS Must Exist on the Server

With this version of the export connector, Documentum Foundation Services (DFS) must be installed on the server. This requirement does not apply to the export destination computer.

Be sure to verify that the DFS web service is running on the server and that the correct address and port are specified for the service endpoints. For details, see the Documentum documentation.

Install the export connector

You can install the export connector on a client or standalone workstation.

To install the export connector successfully, you must have Windows administrator privileges and User Account Control (UAC) must be turned off.

You must install the Kofax software and the Documentum Server components on separate computers. If you install both components on the same computer, communication between any Documentum Server components and the DocBroker will fail.

> ℹ To install the export connector for use with Kofax TotalAgility, disregard the procedure in this section and follow the instructions in Use Kofax TotalAgility to install and set up the export connector.

1. If an earlier version of Kofax Export Connector for Documentum Content Server is currently installed, do one of the following:
   - **Version 8.0.0 or earlier**: Make a note of the current settings for reference, and uninstall the export connector before you continue to the next step.
   - **Version 8.1.0**: Continue to the next step.
2. On the installation media, locate and run `setup.msi`.
   The installation wizard appears.

   > ℹ If Kofax Export Connector 8.1.0 for Documentum Content Server is detected, you are prompted to upgrade to the latest version. If you click **OK**, the upgrade is performed and the existing export connector settings are preserved for use with Version 8.2.0.

3. Click **Next** and follow the instructions on the screen to install the export connector.
4. When you are notified that the installation is complete, click **Finish**.

5. Repeat the installation procedure on all workstations where you plan to use the export connector.

The export connector is automatically registered with Kofax Capture or Kofax Express.

ⓘ If you plan to use Kofax Capture and Kofax Express on the same workstation, see the *Kofax Express Installation Guide* for more information.

Remove the export connector

Use the following procedures to remove the export connector from Kofax Capture, Kofax TotalAgility, or Kofax Express, and then from your computer. You can also repair the export connector if necessary.

Remove the export connector from Kofax Capture

Before removing the export connector from your computer, remove it from Kofax Capture.

Remove the export connector from a batch class

1. In the Kofax Capture Administration module, on the Batch tab, expand the batch class to view associated document classes.
2. Right-click the applicable document class, and select **Export Connectors**.
3. On the **Assigned Export Connectors** list, select the export connector and click **Remove**.

Remove the export connector from the Export Connector Manager

1. In the Kofax Capture Administration module, on the Tools tab, in the **System** group, click **Export Connectors**.
2. On the Export Connector Manager window, select the export connector, and click **Remove**.

Remove the export connector from Kofax TotalAgility

Before removing the export connector from your computer, use the Kofax TotalAgility Export Connector Configuration utility to unassign it from the associated document type and process.

1. In the Kofax TotalAgility program folder, select **Kofax Export Connector**.
   The Kofax TotalAgility Export Connector Configuration utility appears.
2. On the **Export Connector Configuration** screen, click **Setup**.
3. On the next screen, on the **Assigned Export Connectors** list, select the export connector name, click **Remove**, and click **Save**.
   The document type is unassigned from the export connector.
4. On the **Export Connectors - Setup** screen, on the **Select Process** list, select the process associated with the document type that was exported with the connector.
5. On the **Assigned Document Types** list, select the document type assigned to the selected process, click **Remove**, click **Save**, and then click **Close**.
   The process is unassigned from the document type.
6. On the **Export Connector Configuration** screen, click **Manage**.
7. Select the export connector name, click the **Delete** button, and then click **Close**.

Remove the export connector from Kofax Express

Before removing the export connector from your computer, remove it from Kofax Express.

Remove the export connector from a job

1. On the **Job Setup** tab, in the **Export** group, verify that the connector is not associated with any unprocessed jobs.
2. If necessary, assign another connector to any unprocessed jobs.

Remove the export connector registration

1. Verify that you have completed processing for all jobs that require the export connector. You cannot unregister a connector that is assigned to an existing job.
2. On the Kofax menu, click **Options**.
   The **Options** window appears.
3. On the **Options** window, click **Export Connectors**.
4. On the **Export Connectors** list, select the name of the connector to unregister, and click **Remove**.
   The **Export Connectors** list is refreshed, and the export connector is no longer available for use with Kofax Express.

Remove the export connector from the computer

Before removing the export connector from your computer, remember to remove it from Kofax Capture, Kofax TotalAgility, and Kofax Express, as applicable.

You can use the **Control Panel** options to remove the export connector, or you can follow these instructions:

1. Run the `.msi` file that you used to install the export connector.
   When the existing installation is detected, the **Program Maintenance** window appears.
2. Select **Remove**, and then click **Next**.
3. Follow the on-screen instructions to remove the export connector.
   When the removal is complete, a message appears to indicate the export connector was successfully removed.

Repair the export connector

You can use the repair process to replace missing, renamed, or deleted export connector files.

1. Run the `.msi` file that you used to install the export connector.
   When the existing installation is detected, the **Program Maintenance** window appears.
2. Select **Repair**, and then click **Next**.
3. Follow the on-screen instructions to repair the export connector.
   When complete, a message appears to indicate the export connector was successfully repaired.

Set up the export connector

This section gives you instructions for setting up the export connector for use with Kofax Capture, Kofax TotalAgility, or Kofax Express.

Use Kofax Capture to set up the export connector

Use this procedure to install and set up your Documentum export connector for use with Kofax Capture.

1. Start the Kofax Capture **Administration** module.
2. On the **Definitions** panel, click the **Batch** tab.
3. Select a batch class and expand it to view the associated document classes.
4. Right-click the applicable document class to open a context menu, and click **Export Connectors**.

   The **Export Connectors** window appears.
5. On the **Available Export Connectors** list, select **Kofax Export Connector 8.2.0 for Documentation Content Server** and click **Add**.

   The login window appears.
6. Enter the Site URL for the server where the DFS web service is installed, along with the user name, password, and repository name.

   Site URL Examples:

   ```
   http://servername:port/dfs
   ```
   ```
   http://servername:port/my-dfs-71
   ```

   Other formats such as `servername:port` are not valid. The port for the embedded application server is often 9080. You can use the IP address instead of the server name.

   The user name and password are case-sensitive.

   The login information is saved and used during the export process.

   Your selection is moved to the **Assigned Export Connectors** list, and the **Kofax Export Connector 8.2.0 for Documentum Content Server** window appears.
7. On the setup window, configure the settings on each tab. Click **Help** on any tab for details about individual settings.
8. When you finish with the setup window, click **OK**.

   Information messages display a list of changes to the settings and custom properties.
9. Click **OK** to clear the information messages.

Use Kofax TotalAgility to install and set up the export connector

Use this procedure to install and set up your Documentum export connector for use with Kofax TotalAgility.

> ⓘ Before starting the procedure, make sure that you have created a process with an Export activity in Kofax TotalAgility. The export connector will be associated with a document type within the process.

1. In the Kofax TotalAgility program folder, select **Kofax Export Connector**.
   The Kofax TotalAgility Export Connector Configuration utility appears.
2. On the Export Connector Configuration screen, click **Manage**.
3. On the Export Connectors - Manage screen, click the Add icon to add a new export connector.
   The Export Connectors - Add window appears.
4. Navigate to your Documentum installation files, select **setup.msi**, and click **Open**.
   The export connector installer appears.
5. Run the installer.
6. Verify that Kofax Export Connector 8.2.0 for Documentum Content Server is listed on the **Kofax Export Connectors - Manage** screen, and click **Close**.
7. On the Export Connector Configuration screen, click **Setup**.
8. On the Export Connectors - Setup screen, select the process to use for exporting document types to Documentum Server.
9. Select a document type to associate with the selected process, and click **Add**.
10. Click **Connectors**.
    The **Export Connectors - <document type> screen** appears.
11. On the **Available Export Connectors** list, select **Kofax Export Connector 8.2.0 for Documentum Content Server** to assign it to the document type, and click **Add**.
    The Kofax Export Connector for Documentum Content Server login screen appears.
12. Enter the Site URL for the server where the DFS web service is installed, along with the user name, password, and repository name.
    Site URL Examples:

    ```
    http://servername:port/dfs
    ```
    ```
    http://servername:port/my-dfs-71
    ```

    Other formats such as `servername:port` are not valid. The port for the embedded application server is often 9080. You can use the IP address instead of the server name.

    The user name and password are case-sensitive.

    The login information is saved and used during the export process.

    Your selection is moved to the **Assigned Export Connectors** list, and the **Kofax Export Connector 8.2.0 for Documentum Content Server** window appears.
13. On the setup window, configure the settings on each tab. Click **Help** on any tab for details about individual settings.
14. When you finish with the setup window, click **OK**.
    Information messages display a list of changes to the settings and custom properties.
15. Click **OK** to clear the information messages.

Use Kofax Express to set up the export connector

Use this procedure to set up the export connector for use with Kofax Express.

1. Start Kofax Express.
2. On the **Job Setup** tab, in the **Export** group, in the Connector list, click **Kofax Export Connector 8.2.0 for Documentum Content Server**.
3. Click the setup tool.
   The login window appears.
4. Enter the Site URL for the server where the DFS web service is installed, along with the user name, password, and repository name.
   Site URL Examples:

   ```
   http://servername:port/dfs
   ```

   ```
   http://servername:port/my-dfs-71
   ```

   Other formats such as `servername:port` are not valid. The port for the embedded application server is often 9080. You can use the IP address instead of the server name.

   The user name and password are case-sensitive.

   The login information is saved and used during the export process.

   The **Kofax Export Connector 8.2.0 for Documentum Content Server** window appears.
5. On the setup window, configure the settings on each tab. Click **Help** on any tab for details about individual settings.
6. When you finish with the setup window, click **OK**.
   Information messages display a list of changes to the settings and custom properties.
7. Click **OK** to clear the information messages.

Exporting eDocuments

The following sections describe how eDocuments are exported to the Documentum Server repository, based on their storage location: a specified cabinet, folder or virtual document.

Storing to a cabinet / folder

If a document to be exported contains eDocuments, and Store to Virtual Document is **not** selected on the Storage Settings tab, the following occurs:

1. Each image is exported to a document object. The images are stored in Documentum Server using the same image content type (file format). The document object is given the name of the document (object_name) as specified on the **Document Settings** tab.
2. A check is performed to verify the existence of a virtual document with the same name as the document object from the preceding step.
   - If it exists, the virtual document is checked out, versioned, and checked back in to the Documentum Server repository.
   - If it does not exist, the document object is converted to a virtual document and given the same name as the document object.

3. eDocuments are added to a document object in the order they are imported. The document objects are saved within their respective virtual documents. Each document object name is based on the file name and extension supplied by Kofax Capture. In addition, all eDocuments are exported using the format name suggested by Documentum Server for the file being exported.

   For example, a Microsoft Word document would get a suggested format name of "Word document." When viewed in the Documentum Server Desktop Client, the Word document object's format name attribute would have a value of "Word document." In addition, the user can double-click the document to view it in Microsoft Word.

Example

Consider the following list of single page images and eDocument files scanned or imported into a specified cabinet or folder. Note that eDocuments are only imported.

1. .xls

2. .tif

3. .tif

4. .xls

5. .xls

6. .tif

In this case, the structure in the Documentum Server repository would be similar to the following figure.
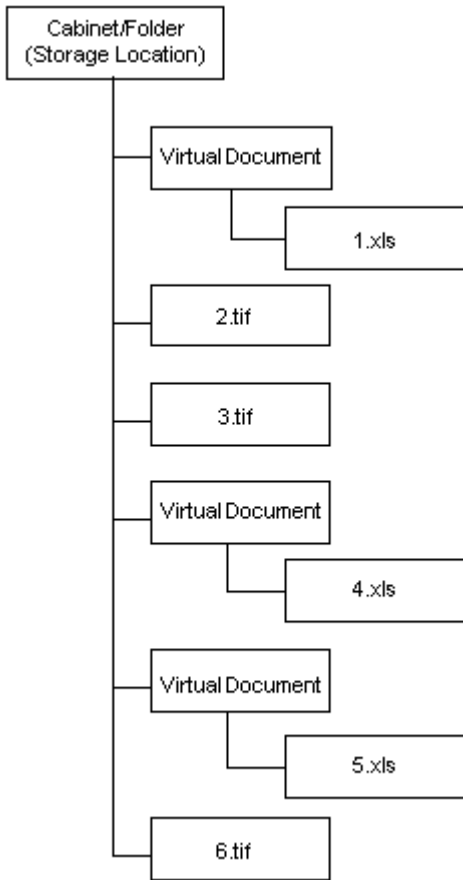
Store to a Cabinet/Folder

Storing to a virtual document

If a document to be exported contains eDocuments and Store to Virtual Document is selected on the Storage Settings tab, the following occurs:

1. The virtual document specified on the **Storage Settings** tab is checked out, versioned, and checked back into the Documentum Server repository.

2. Each image, if available, is added to a newly created document object. The images are stored using the same image content type (file format). The document object is given the name of the document (object_name) as specified on the **Document Settings** tab. The document object is then converted to a virtual document and given the same name as the document object.

3. If no images are available, a virtual document is created to contain the eDocuments (see the next step). The virtual document is given the name of the document (object_name) as specified on the **Document Settings** tab.

4. eDocuments are then added to the newly created document objects in the order they are imported. The document objects are saved within their respective virtual documents. Each document object is named based on the file name and extension supplied by Kofax Capture. In addition, all eDocuments are exported using the format name suggested by Documentum Server for the file being exported.

5. The newly created virtual document (from step 2 or 3) is added to the virtual document storage location as specified on the **Storage Settings** tab.

Example:

Consider the following list of single page images and eDocument files scanned or imported into a document. Note that eDocuments are only imported.

1. .xls
2. .tif
3. .tif
4. .xls
5. .xls
6. .tif

In this case, the structure in the Documentum Server repository would be similar to the following figure.
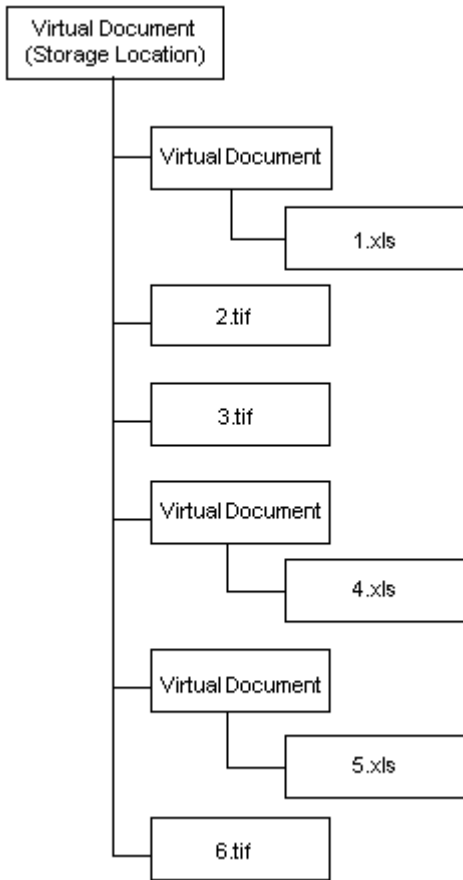
Store to a Virtual Document

Exporting eDocuments only (without image files)

Process the first eDocument as a primary document if only eDocument exist and no image files are detected check box is added to the Image Format tab. If you select this check box, eDocuments are processed as primary document. If this option is clear, eDocuments are sent as virtual documents rather than rendition files. Only an OCR file can be exported as a rendition file.

Kofax Capture OCR Full Text options

To export OCR Full Text files, you must enable Kofax Capture OCR Full Text processing in the applicable document class and add the OCR Full Text module to the workflow for the applicable batch class.

Unsupported Kofax Capture features

The following Kofax Capture features are not supported with this export connector.

SecurityBoost

The SecurityBoost feature is used to enhance Kofax Capture security. If security is an issue, run the export connector on a protected computer.

If the SecurityBoost feature is enabled for Kofax Capture, you need to bypass it by opening a command prompt window and typing the following:

```
Release.exe /NoBoost
```

Example:

```
"C:\Program Files (x86)\Kofax\CaptureSS\ServLib\Bin\Release.exe" /NoBoost
```

File Name Retention

File name retention is not supported. This means that the original imported file name is not retained and the default numeric name is used for the exported files.

> ⓘ Use the Kofax Value "{First Page Original File Name}" to retain the original file name for the first page of a document. This value can be linked to Documentum Server properties that support Kofax Values. Notice that the Documentum Server property type must be able to accept all the characters that are part of the original file name and must not exceed the defined length; otherwise, the export may fail.