Kofax Export Connector for Text Administrator's Guide

Version: 1.1.0

Date: 2023-02-24

KOFAX

Table of Contents

Administrator's Guide

This document gives you the information about installing Kofax Export Connector for Text 1.1.0, which is used to export documents from Kofax TotalAgility or Kofax Express as plain text converted to image, OCR, or PDF output.

Overview

With Kofax Export Connector for Text, batches are processed based on export settings. Documents and index data are exported to a specified location in text format based on the settings defined during export setup.

In a multiuser environment, the export process typically runs on an unattended workstation that polls for available batches at regular intervals. You can configure the export process to run during off-hours to avoid any impact to the performance of Kofax TotalAgility, Kofax Express, or the network system.

Product documentation

The Kofax Export Connector for Text documentation set is available online at the following URL[1]:

https://docshield.kofax.com/Portal/Products/KEC_Text/1.1.0-qor9ut9y93/Text.htm

The full documentation set includes the following items:

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

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

Kofax Export Connector for Text Administrator's Guide
Contains information for administrators who are responsible for installing, configuring, and maintaining applications, including export connectors.

---

[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 Text Help

Describes the configuration settings required to set up the Kofax Export Connector for Text application.

Offline documentation

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

- KofaxExportConnectorDocumentation_1.1.0_ForText_EN.zip

  Contains the entire product documentation set in English.
- KofaxExportConnectorDocumentation_1.1.0_ForText_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 Text Administrator's Guide*.
- The **help** folder: Contains *Kofax Export Connector for Text Help*.

To set up the documentation for use in offline mode, perform the following steps:

1. After you install Kofax Export Connector for Text, 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 Express:
      ```
      [drive:]\Program Files (x86)\Kofax\Kofax Express\bin\KEC-Text
      \Documentation\<language code folder>
      ```
    - For Kofax TotalAgility:
      ```
      [drive:]\Program Files (x86)\Kofax\TotalAgility\ExportConnectors\bin
      \KEC-Text\Documentation\<language code folder>
      ```

4. Start Kofax Export Connector for Text and click the Help icon to open the Help in a new browser window.

> ⓘ If you remove the product, the Documentation folder is not deleted automatically. You need to delete it manually.

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

To access the Kofax Knowledge Base:

1. Go to the Kofax website home page and select **Support**.

2. When the Support page appears, select **Customer Support** > **Knowledge Base**.

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

The Kofax Knowledge Base 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.

  Scroll through the Kofax Knowledge Base home page to locate a product family. Then click a product family name to view a list of related articles. Please note that some product families require a valid Kofax Portal login to view related articles.

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

  Click the **Community** link at the top of the page.
- Access the Kofax Customer Portal (for eligible customers).

  Click the **Support** link at the top of the page. When the Customer & Partner Portals Overview appears, click **Log in to the Customer Portal**.
- Access the Kofax Partner Portal (for eligible partners).

  Click the **Support** link at the top of the page. When the Customer & Partner Portals Overview appears, click **Log in to the Partner Portal**.
- Access Kofax support commitments, lifecycle policies, electronic fulfillment details, and self-service tools.

  Go to the **General Support** section, click **Support Details**, and then select the appropriate tab.

System requirements

Most software requirements for Kofax Export Connector for Text, including the supported versions of Kofax TotalAgility and Kofax Express, are listed in the *Kofax Export Connector Technical Specifications* document, which is available from the Kofax Export Connector for Text Product Documentation Site.

Install the export connector

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

To install the export connector successfully, you must run the installer with Windows administrator privileges.

To run the installer with Windows administrator privileges, do one of the following:
- Open a Windows Command Prompt window with administrator rights and run the installation .msi file.
- Right-click on the installation .msi file and select the "Run as Administrator" option.

Use Kofax TotalAgility to install and set up the export connector

Use this procedure to install and set up your 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 export connector installation files, select `setup.msi`, and click **Open**.
   The export connector installer appears.
5. Run the installer.
6. Verify that Kofax Export Connector for Text 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 Kofax Export Connector for Text.
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 for Text** and click **Add**.

    Your selection is moved to the **Assigned Export Connectors** list, and the **Export Connector Setup** window appears.

12. On the **Export Connector Setup** window, configure the settings on each tab. Click **Help** on any tab for details about individual settings.

13. When you finish with the setup window, click **OK**.

    Information messages display a list of changes to the settings and custom properties.

14. Click **OK** to clear the information messages.

Select the language

To change the language for Kofax Export Connector for Text, update the operating system language. The change goes into effect after you restart both Kofax TotalAgility and the export connector. For details on changing the operating system language, refer to your Microsoft documentation.

> ℹ️ If the selected language is not supported for Kofax Export Connector for Text, English is used.

Use Kofax Express to install and set up the export connector

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

1. Copy the product files from the installation media to the Administration or Export workstations where you plan to use the export connector.

2. On the installation media, locate and run `setup.msi` with administrator rights. If Kofax Export Connector 1.0.x for Text is detected, you are prompted to upgrade to the latest version. After you click **OK**, the upgrade is performed by installer. In this scenario:

    • Kofax Export Connector 1.0.x for Text will be replaced by Kofax Export Connector for Text 1.1.0.

    • The Kofax Export Connector 1.0.x for Text settings will be preserved for use with the new version 1.1.0.

    If Kofax Export Connector 1.0.x for Text is detected but you do not want to upgrade it directly through the installer, you can cancel the setup, remove the old version, and then run `setup.msi` again to start a new installation.

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 Administration or Export workstations where you plan to use the export connector.

    The export connector is automatically registered with Kofax Express. To set up the export connector, perform the following:

6. Start Kofax Express.

7. On the **Job Setup** tab, in the **Export** group, in the **Connector** list, click **Kofax Export Connector for Text**.

8. Click the **Setup** tool.

    The **Kofax Export Connector for Text Setup** window appears.

9. In the **Kofax Export Connector for Text Setup** window, configure the settings on each tab. Click **Help** on any tab for details about individual settings.

10. When you finish with the **Kofax Export Connector for Text Setup** window, click **OK**. Information messages display a list of changes to the settings and custom properties.

11. Click **OK** to clear the information messages.

Select the language

Use the following procedure to select the export connector language. Your selection goes into effect after you restart Kofax Express.

In Kofax Express, select **Options** > **General** > **Kofax Express Language**.

Remove the export connector

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

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 all of the associated document types and processes.

1. In the Kofax TotalAgility program folder, select **Kofax Export Connector**.
   The **Kofax TotalAgility Export Connector Configuration** utility appears.

2. On the **Kofax TotalAgility Export Connector Configuration** screen, click **Setup**.

3. On the **Export Connectors - Setup** screen, on the **Select Process** list, select the process associated with the document type that is exported by the export connector.

4. On the **Assigned Document Types** list, select the document type assigned to the selected process and click **Connectors**.

5. On the **Export Connectors - <Document Type>** screen, on the **Assigned Export Connectors** list, select the export connector name, click **Remove**, then click **Save** when prompted.

6. On the **Export Connector Configuration** screen, click **Manage**.

7. Select the export connector name, click the **Delete** button, and then click **Close** when prompted.

Remove the export connector from Kofax Express

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

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 this 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. In 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 your computer

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

You can use the Windows **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 **Application 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 **Application 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.