



# Kofax Export Connector for XML Administrator's Guide

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**KOFAX**

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# Administrator's Guide

This document gives you information about installing Kofax Export Connector for XML, which is used to export XML documents from Kofax Capture, Kofax TotalAgility, or Kofax Express.

## Overview

With Kofax Export Connector for XML, batches are processed based on export settings. Documents and index data are exported to your repository in XML format based on the settings defined during export setup. You can export the data using a fixed XML schema definition (.xsd and .dtd), or using a custom XSLT transform to convert data to the format required by the destination repository.

In a multiuser installation, 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 Capture, Kofax TotalAgility, Kofax Express, or the network system.

## Product documentation

The Kofax Export Connector for XML documentation set is available online at the following URL<sup>1</sup>:

[https://docshield.kofax.com/Portal/Products/KEC\\_XML/8.1.0-t2w5nbdvw/XML.htm](https://docshield.kofax.com/Portal/Products/KEC_XML/8.1.0-t2w5nbdvw/XML.htm)

The full documentation set includes the following items:

*Kofax Export Connector for XML Release Notes*

Contains late-breaking product information not included in other product documentation.

*Kofax Export Connector for XML Technical Specifications*

Contains information on supported operating systems and other system requirements.

*Kofax Export Connector for XML Administrator's Guide*

Contains information for administrators who are responsible for installing, configuring, and maintaining the Export Connector.

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<sup>1</sup> 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 XML Help*

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


## Offline documentation

To make the documentation available for use in offline mode, obtain the documentation files from the Kofax Export Connector 8.1.0 for XML product package that you downloaded from the [Kofax Fulfillment Site](#). The product package includes the following documentation files for offline use:

- `KofaxExportConnectorDocumentation_8.1.0_ForXML_EN.zip`  
Contains the entire product documentation set in English.
- `KofaxExportConnectorDocumentation_8.1.0_ForXML_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 XML Administrator's Guide*
  - The **help** folder: Contains *Help for Kofax Export Connector for XML*
1. After you install Kofax Export Connector 8.1.0 for XML, 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.XML.8\Documentation\ or`  
`[drive:]\Program Files (x86)\Kofax\CaptureSS\ServLib\Bin`  
`\Kofax.XML.8\Documentation\`
    - For Kofax Express:  
`[drive:]\Program Files (x86)\Kofax\Kofax Express\bin`  
`\Kofax.XML.8\Documentation\`
    - For Kofax TotalAgility:  
`[drive:]\Program Files (x86)\Kofax\TotalAgility\ExportConnectors\bin`  
`\Kofax.XML.8\Documentation\`

 If you uninstall the product, the Documentation folder is not deleted automatically. You must delete it manually.

4. Start the Kofax Export Connector for XML 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>.

 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

Most software requirements for Kofax Export Connector for XML, including the supported versions of Kofax Capture, Kofax TotalAgility, and Kofax Express, are listed in the *Kofax Export Connector*

*Technical Specifications* document, which is available at [https://docshield.kofax.com/Portal/Products/KEC\\_XML/8.1.0-t2w5nbjdvv/XML.htm](https://docshield.kofax.com/Portal/Products/KEC_XML/8.1.0-t2w5nbjdvv/XML.htm).

## 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.

**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. 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`. If Kofax Export Connector for XML 8.0 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 for XML 8.0 will be replaced by Kofax Export Connector 8.1.0 for XML
  - Settings of all Kofax Export Connector for XML v8.0 will be preserved for use with the new version 8.1.0

If Kofax Export Connector for XML 8.0 is detected but you do not want to upgrade directly by installer, you can cancel the setup, remove the old versions, 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.
6. Configure settings for the Export Connector. See the [Set Up the Export Connector](#) section.

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

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

When upgrading the export connector for use with Kofax Capture, you must republish the batch class to update the export connector version and finalize the upgrade process.

## 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 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 for XML** and click **Add**.  
Your selection is moved to the **Assigned Export Connectors** list, and the **Kofax Export Connector for XML setup** window appears.
6. On the setup window, configure the settings on each tab. Click **Help** on any tab for details about individual settings.
7. When you finish with the setup window, click **OK**.  
Information messages display a list of changes to the settings and custom properties.
8. 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 Capture.

In Kofax Capture, open the **Administration** or **Batch Manager** module, select **Options > Language**.

## 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 XML 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 XML.
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 XML** and click **Add**.  
Your selection is moved to the **Assigned Export Connectors** list, and the **export connector setup** window appears.
12. On the 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 XML, 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.

 If the selected language is not supported for Kofax Export Connector for XML, English is used.

## 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 for XML**.
3. Click the **Setup** tool.  
**Kofax Export Connector for XML Setup** window appears.
4. On the **Setup** window, configure the settings on each tab. Click **Help** on any tab for details about individual settings.
5. When you finish with the **Kofax Export Connector for XML Setup** window, click **OK**.  
Information messages display a list of changes to the settings and custom properties.
6. 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**.