



# Kofax PSICapture Installation Guide

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**KOFAX**

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# Preface

This guide includes the information you need to successfully install and configure Kofax PSICapture, and activate the product license.

## Product documentation

The documentation set for Kofax PSICapture is available here:<sup>1</sup>

<https://docshield.kofax.com/Portal/Products/PSICapture/7.9.0-heg50s9cek/PSICapture.htm>

In addition to release notes, the Kofax PSICapture documentation set includes:

- [Kofax PSICapture Installation Guide](#)
- [Kofax PSICapture Administrator Help](#)
- [Kofax PSICapture User Help](#)
- [Kofax PSICapture Technical Specifications](#)

**i** If the security policy for your organization restricts Internet access or the Internet connection is not stable, you can access the documentation in [offline mode](#) while using Kofax PSICapture.

## Offline mode

To make the documentation available for use in offline mode, obtain the following file from the Kofax PSICapture product package that you downloaded from the [Kofax Fulfillment Site](#).

- KofaxPSICaptureDocumentation\_7.9.0\_EN.zip

Copy the .zip file to your PSICapture computer and extract the contents:

- `Print` folder: Includes the *Kofax PSICapture Installation Guide*.
- `Help` folder: Includes *Kofax PSICapture Administrator Help* and *Kofax PSICapture User Help*.

Navigate to **PSICapture > Configuration > Capture Server > Advanced settings > Support Options**.

Under **Settings to override default Support links**, in the **Product documentation address field**, set the path to the folder with the extracted files, such as:

```
c:\ProgramData\Kofax\KofaxPSICaptureDocumentation_7.9.0_EN
```

---

<sup>1</sup> You must be connected to the Internet to access the full documentation set online.

## Training

Kofax offers both classroom and computer-based training that will help you make the most of your Kofax PSICapture solution. Visit the [Kofax Education Portal](#) for 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**.

**i** 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.

## Chapter 1

# Overview


Kofax PSICapture is a single platform designed to meet your capture needs, including document scanning and import, forms processing, OCR/ICR data extraction, and the ability to migrate information into a document repository. Kofax PSICapture can simplify document processing for any organization, regardless of size or scope.

## System requirements

The primary source of information about system requirements is the *Technical Specifications* document, which is available on the [Kofax PSICapture Product Documentation site](#). The document is updated regularly and we recommend that you review it carefully, especially if you plan to use PSICapture with other Kofax products.

### SQL Server database

By default, PSICapture installs Microsoft SQL Server 2017 Express Local Database as part of the prerequisites. If you plan to host your batch and configuration databases in a SQL Server instance, you can leverage the extended Microsoft SQL Server Express capabilities. For details, see the Microsoft website.

 You must use a Windows account with elevated permissions to run the PSICapture installer. Otherwise, the database may not be installed properly and related services may fail.


### Port, Directory and Registry Exclusions

You can take measures to ensure that PSICapture network traffic is not disrupted by third-party antivirus programs or blocked by firewalls, intrusion prevention programs, and other filtering methods.

To prevent service failures and ensure that your network stations can communicate with the Capture Server and License Server, you can add exclusions and rules affecting the following areas:

#### **Network traffic (firewall)**

PSICapture service ports (default): TCP 47232-47233

 You can use the Configuration Manager to adjust Service ports.

**On-access or real-time scanning folders**

C:\ProgramData\PSIGEN

C:\Program Files (x86)\PSIGEN

C:\Windows\System32\config\systemprofile\AppData\Local\Microsoft\Microsoft SQL Server Local DB\

Batch storage folders

Migration storage folders

Mailroom deployment folders (optional)

**Auto-Import monitored folders**

All folders monitored by the Auto Import Service as a part of your Capture Profile configuration should be specified for exclusion from realtime scanning or on-access scanning to prevent Auto Import processing delays.

**Programs (EXEs)**

C:\Program Files (x86)\PSIGEN\Capture\Capture.AutoImportProcessor.EXE

C:\Program Files (x86)\PSIGEN\Capture\Capture.Services.EXE

C:\Program Files (x86)\PSIGEN\Capture\Capture.EXE

C:\Program Files (x86)\PSIGEN\Capture\Utilities\AutomationMonitor.EXE

C:\Program Files (x86)\PSIGEN\Capture\Utilities\BarcodeGenerator.EXE

C:\Program Files (x86)\PSIGEN\Capture\Utilities\LicenseServer.EXE

C:\Program Files (x86)\PSIGEN\Capture\Utilities\ServiceManager.EXE

**Services**

Optional: Mailroom (formerly Fusion) Services

**Registry entries**

HKEY\_LOCAL\_MACHINE\SOFTWARE\WOW6432Node\PSIGEN Software, Inc.

## Chapter 2

# Install Kofax PSICapture

This chapter explains how to install Kofax PSICapture, activate the product license, and configure the Service Manager. Be sure to review the following sections before proceeding with the installation.

- [Back up](#) existing Kofax PSICapture files, if applicable.
- [Extract and unblock installation files](#).
- [Run the installer](#).
- [Activate the License](#).

## Perform a backup

If you are currently working with an earlier version of PSICapture, back up the entire contents of `C:\ProgramData\PSIGEN` before proceeding with the upgrade process. Save the backup in a separate location to ensure that your configuration, batch, form, and licensing data is preserved.

Be sure to review the information in [Appendix A](#), which explains how OCR settings from earlier versions are mapped to corresponding Kofax OmniPage OCR settings during the Kofax PSICapture 7.9.0 installation process.

## Extract and unblock installation files

Use this procedure to extract the ZIP archive containing the application executable file for installing Kofax PSICapture.

1. Right-click **KofaxPSICapture-7.9.0.ZIP** and select **Extract All**.  
The executable application file is extracted to a folder named **Kofax.PSICapture-7.9.0**.
2. In the **Kofax.PSICapture-7.9.0** folder, right-click **Kofax.PSICapture.Setup.7.9.0.nn.exe**, and then click **Properties**.

**i** In the preceding executable file name, "nn" corresponds to the build number.

3. Near the bottom of the Properties file, select the **Unblock** check box.  
The Unblock option may not be available on all operating systems; however, if it exists on your system, it is imperative to select it.



## Run the installer

Use this procedure to set installation preferences and run the Kofax PSICapture installer. As another option, you can [perform a silent installation](#).

**⚠** You must use a Windows account with elevated permissions to run the PSICapture installer. Otherwise, the database may not be installed properly and related services may fail.

1. If you are upgrading from an earlier version of the software, ensure that you follow the instructions in [Perform a backup](#), and then uninstall PSICapture.
2. Confirm that the procedure in [Extract and unblock installation files](#) is complete.
3. In Windows File Explorer, right-click **Kofax.PSICapture.Setup.7.9.0.nn.exe** and do the following:
  - a. Select the **Compatibility** tab.
  - b. On the **Compatibility** tab, in the Settings group, select the **Run this program as an Administrator** check box.
  - c. Click **Apply** and then click **OK**.

The PSICapture Setup opens to the Prerequisites Wizard screen.

4. On the **Prerequisites Wizard** screen, click **Next** to proceed to the list of required prerequisites. The wizard lists all prerequisites and detects which ones are already installed. Any missing prerequisites are automatically selected for inclusion in the installation process, and existing prerequisites are skipped.
5. Click **Next** to install any prerequisites that are missing from your system.
6. When the PSICapture Setup screen appears, click **Next** to proceed with the installation.
7. Review the license agreement, select **I agree to the terms in the License Agreement**, and click **Next**.
8. On the **Select Features** screen, select the components you require, and then click **Next**.
  - **PSICapture**: Installs the core workflow modules used to process content within PSICapture.
  - **PSICapture Administration**: Installs the Administration component, which is used for configuration purposes only; workflow modules are not accessible from the Administration component. You can run this component without a license.
  - **License Server**: Installs the License Server service and management tools, which are used to manage the concurrent licenses and page counts for pooled images. Although not required for a standalone installation, the License Server is essential in a distributed environment that includes two or more PSICapture stations.
9. On the **Installation Folder** screen, do one of the following and click **Next**.
  - Accept the default installation folder listed on the screen.
  - Browse to select another installation folder.
10. On the **Ready to Install** screen, click **Install** to proceed with the installation. If you are upgrading from an earlier version of PSICapture, the existing configuration files are detected and updated for use with the new version.
11. When prompted that the installation is complete, click **Finish** to exit the installer.

12. Proceed to [Activate the License](#).

## Uninstall PSICapture

You can use Control Panel to uninstall the PSICapture application from your computer.

**i** The configuration, batch, form and licensing data is not removed when you uninstall PSICapture. The data is preserved in `C:\ProgramData\PSIGEN`.

1. If you plan to reinstall PSICapture after removing it, back up the contents of `C:\ProgramData\PSIGEN` in a separate location.
2. Select **Control Panel > Programs > Programs and Features**.
3. On the list of currently installed programs, select **Kofax PSICapture**.
4. Right-click and select **Uninstall**.

## Install PSICapture silently

You can use command line parameters to install Kofax PSICapture silently, without interacting with the installer interface.

With the silent method, the installer uses a bootstrapper to manage the prerequisites and then start the main MSI installer. The examples in this section show the command line parameters available for the bootstrapper and those that can be passed to the MSI.

The command line parameters for this version of PSICapture installer are similar to the following when the .msi default folder is used:

### Extract and install .msi

```
Kofax.PSICapture.Setup.7.9.0.nn.exe /extract "C:\PSIsetup"  
cd "C:\PSIsetup"  
msiexec /a "Setup.msi" /qn /l*v c:\silent.log
```

**i** In the preceding executable file name, "nn" corresponds to the build number.

To specify another .msi folder:

```
msiexec /a "Setup.msi" APPLICATIONFOLDER="C:\Program Files (x86)\PSICapture\" /qn /l*v  
c:\silent.log
```

Two methods are available for silent installation:

- The command parameter `/i` after `msiexec` installs PSICapture normally as the current user.
- The command parameter `/a` after `msiexec` installs PSICapture as an Administrator and can be used over a network.

### Install EXE from current folder

```
Kofax.PSICapture.Setup.7.9.0.nn.exe /qn /l*vc:\silent.log
```

### Install EXE from specified folder

```
Kofax.PSICapture.Setup.7.9.0.nn.exe APPLICATIONFOLDER="C:\Program Files  
(x86)\PSICapture\" /qn /l*vc:\silent.log
```

Additional commands/parameters may be necessary to account for permissions and other elements related to your organization's environment. We recommend that you consult with your IT department for recommendations.

## Uninstall PSICapture silently

Similar to the silent installation, two methods are supported for uninstalling PSICapture. The first method mirrors the installation but substitutes the `/i` or `/a` installation parameter with the `/x` uninstallation parameter:

```
msiexec /x "Setup.msi" /qn /l*v c:\silent.log
```

Alternate option:

```
msiexec /uninstall {CCAE2F77-EC83-4ADA-A367-144F577EA8E0} /qn
```

With the second method, the extraction and location of the original EXE used for the installation are required. Specify the location with the same parameter, unless you have already used the `cd` command line entry to specify a working folder:

```
msiexec /x "Setup.msi" APPLICATIONFOLDER="C:\Program Files (x86)\PSICapture\" /qn /l*v c:\silent.log
```

## Use Windows Management Instrumentation

Windows Management Instrumentation supports the ability to install and uninstall applications silently.

To install PSICapture, start with a `runas` command to set proper Administrator credentials. Then, follow up with the `wmic` commands to specify the target machine and call up the installer with the appropriate path to the installation package.

Here is an example of a silent installation command line using Windows Management Instrumentation:

```
runas /user:[DomainAdminAccount@DOMAIN] cmd  
wmic /node:[exampleremotemachine] call install true,  
"C:\User\Downloads\Setup.msi", /nointeractive
```

## Uninstall PSICapture

Windows Management Instrumentation supports the ability to uninstall applications via a reference name. Here is an example of a silent uninstallation command line using Windows Management Instrumentation:

```
wmic product where name="CAPTURE" call uninstall /nointeractive
```

## Activate the License

After installing PSICapture, use one of the following procedures to activate the product license:

- [Activate product via License Server](#)
- [Activate product via standalone license](#)

Some PSICapture modules require specific licensing. Consult your sales representative to ensure that your license supports all modules that are necessary to meet the needs of your organization.

## Activate product via License Server

Use this procedure to activate PSICapture via the License Server for use with multiple licenses and stations.

1. Click the Windows Start button, type **License Server** in the Search box, and select the **License Server** icon.
2. On the **License Server** screen, select **Activate License Server**.
  - i** The red box and white "X" over the icon next to the server name indicate that the server is not active.
3. On the **Activate License Server** screen, select **Retrieve and Install Licenses over the Internet**.
  - i** If the License Server does not have Internet access, see [Activate License Server Offline](#).
4. Enter the applicable license key.

The following PSICapture license keys are available. The first two characters correspond to the type of license key:

  - LSxxx-xxxxxxx - License Server Activation Key
  - PLxxx-xxxxxxx - License Server Key
  - PSxxx-xxxxxxx - Product Key
5. When the **Registration Form** appears, fill out the contact information and note that the Name, Company and Email entries are required. Then click **Register**.
  - i** When the server activation is complete, the red box and white X are replaced with a green box and white checkmark.
6. Click the **Add** button on the right side of the License Server window.
7. Select **Retrieve and Install Licenses over the Internet**.
  - i** If the License Server does not have Internet access, see [Activate product via License Server while offline](#).
8. Type in the Product key and then click **Next**.
9. Fill out the **Registration Form** and note that fields in bold are required. Then click **Next**.

Once the activation is complete, a list of available keys is listed.
10. Repeat steps 6-9 for any additional product keys.

## Activate License Server offline

If an Internet connection to the License Server is not available, use this procedure on another computer to activate the License Server for use with multiple licenses and stations.

To activate volume-based licenses, PSICapture requires an active Internet connection. See [Activate product via License Server](#).

1. Go to a PSICapture station that has an active Internet connection to the License Server.
2. Select **Activate License Server**, and then select **Retrieve Licenses Using Offline Licensing**.
3. On the **Activate License Server** window, enter your LS licensing key such as LSXXX-XXXXXXXXXX.
4. In the **Contact Email** field, enter an email address where the license should be sent.
5. Fill out the registration information and note that the Name, Company and Email entries are required. Click **Next**.
6. When prompted, save the Offline Activation file, LicenseRequest.xml, to a local folder on your computer.
7. Do one of the following to submit the Offline Activation file:
  - Submit the file to the Support portal at <https://support.psigen.com>.
  - Proceed to the next step to submit the file to the Licensing Portal at <https://licensing.psigen.com/offlinelicensing.aspx>.
8. To submit the file to the Licensing Portal:
  - a. Select **Choose File** and navigate to LicenseRequest.xml saved earlier on your computer.
  - b. Click **Submit**.
  - c. When notified that the offline license is ready to download, click **Download License**.
9. Return to the License Server and select **Activate License Server**.
10. Select **Install Licenses retrieved using Offline Licensing**.
11. Select the Offline License Activation file that you received from Support, or from the Offline Activation Portal.

## Activate product via License Server while offline

Use this procedure to activate a PSICapture product license via the License Server while offline.

1. Click the Windows Start button, type License Server in the Search box, and select the **License Server** icon.
2. Click **Add** to begin the Product Activation process.
3. Select **Retrieve License Using Offline Licensing**.
4. Enter your License Server key to activate all products simultaneously, or enter an individual product key.

The following PSICapture license keys are available. The first two characters correspond to the type of license key:

  - LSxxx-xxxxxxxx - License Server Activation Key
  - PLxxx-xxxxxxxx - License Server Key
  - PSxxx-xxxxxxxx - Product Key
5. When the **Registration Form** appears, fill out the contact information and note that the Name, Company and Email entries are required. Then click **Next**.
6. When prompted, save the Offline Activation file, LicenseRequest.xml, to a local folder on your computer.

7. Do one of the following to submit the Offline Activation file:
  - Submit the file to the Support portal at <https://support.psigen.com>.
  - Submit the file to the Licensing Portal at <https://licensing.psigen.com/offlinelicensing.aspx>. For instructions, continue to the next step.
8. To submit the file to the Licensing Portal:
  - a. Select **Choose File** and navigate to LicenseRequest.xml saved earlier on your computer.
  - b. Click **Submit**.
  - c. When notified that the offline license is ready to download, click **Download License**.
9. Return to the License Server and click **Add** once again.
10. Select **Install Licenses Retrieved Using Offline Licensing**.
11. Select the Offline License Activation file that you received from Support, or from the Offline Activation Portal.

## Activate product via standalone license

Use this procedure to activate the PSICapture product license in a standalone environment.

1. After installation, start PSICapture.  
The PSICapture Licensing screen appears if the product is not yet licensed.
2. On the PSICapture Licensing screen, do the following:
  - a. Select **Obtain a license using a product key (stand-alone install, NFR install, etc.**
  - b. In the **Product Key to Register** field, enter the product key provided when you purchased PSICapture, and click **Next**. The product key sequence begins with PS, such as PSxxx-xxxxxxx.
3. When the **Registration Form** appears, fill out the contact information and note that required fields are listed in bold. Then click **Register**.  
PSICapture activates your license online and launches the application.

## Activate standalone license offline

If an Internet connection to the License Server is not available, use this procedure on another computer to activate the PSICapture standalone license.

1. After installation, start PSICapture.  
The PSICapture Licensing screen appears if the product is not yet licensed.
2. On the **PSICapture Licensing** screen, select **Obtain License using offline activation**, and click **Continue**.  
The Offline Licensing screen appears.
3. On the **Offline Licensing** screen:
  - a. **Offline Licensing options:** Select **Submit a new license request for this station**.
  - b. **Register product key:** Enter your product key and the email address to which the license (OfflineLicense.xml) should be sent.
  - c. Click **Next**.  
The Registration form appears.

4. On the **Registration** form:
  - a. Fill out the registration information and note that the Name, Company and Email entries are required.
  - b. Click **Finish**.
5. When prompted, save the Offline Activation file, LicenseRequest.xml, to a local folder on your computer.
6. Make a copy of LicenseRequest.xml that you can access on another computer that has Internet access.
7. From the computer with Internet access, do one of the following to submit the Offline Activation file:
  - Submit the file to the Support portal at <https://support.psigen.com>.
  - Submit the file to the Licensing Portal at <https://licensing.psigen.com/offlinelicensing.aspx>. For instructions, continue to the next step.
8. To submit the file to the Licensing Portal:
  - a. Select **Choose File** and navigate to LicenseRequest.xml saved earlier on your computer.
  - b. Click **Submit**.
  - c. When notified that the offline license is ready to download, click **Download License**.
9. Copy the Offline License Activation file that you received from Support, or from the Offline Activation Portal, to the computer that you need to license.

## Apply offline license

Use this procedure to apply the Offline License file that you downloaded from the Licensing Portal, or received via email from Support as described in the previous section.

1. Start PSICapture.
2. Select **Obtain a license using offline activation**, and click **Next**.
3. Select **Install a license received from a previous request**.
4. In the **Select the license file to install** field, click the ellipsis and browse to the license file saved previously to a local folder on your computer.
5. Click **Open**, and then click **Next**.  
PSICapture validates the license.

## Configure the Service Manager

After installing Kofax PSICapture and activating the license, use this procedure to configure Service Manager settings for your station.

1. Do one of the following to start **Service Manager**:
  - Click the Windows Start button, type Service Manager in the Search box, and select the **Service Manager** icon.
  - Start PSICapture and select **Utilities > Service Manager**.

The **Service Manager** window appears.

2. Select the mode that corresponds to the PSICapture station you are configuring:
  - **Stand-alone station:** Does not connect to outside systems running PSICapture for configuration or batch information. The security module is disabled in this mode.
  - **Network station:** Connects to the Capture server for configuration, batch management, logging, and security. When selecting this mode, you must use the **Capture server** field to specify the Capture server name or IP Address.
  - **Capture server:** Uses the Capture server to share the configuration settings with other PSICapture stations across the network. Batch management is managed from the Capture server to balance jobs across multiple stations. Logging is centralized to this server for diagnostics, and security is centrally managed.



## Appendix A

# Kofax OmniPage OCR Engine

Effective with Kofax PSICapture 7.9.0, the Kofax OmniPage OCR engine replaces the OpenText RecoStar OCR engine. The OmniPage OCR engine is included when you install the product.

When upgrading from earlier Kofax PSICapture versions, all existing settings configured for use with the RecoStar engine are converted to corresponding OmniPage settings at runtime to achieve consistent results. If a corresponding OmniPage setting is not available, it is skipped.

Note how the following RecoStar settings are mapped to OmniPage:

- "Enable OCR logical context filtering" is mapped to "Enable spell check."
- The "Unknown" value for the "Machine print font type" setting is mapped to "Automatically detect hand-printed text."
- "Enable OCR Trigram mode" is ignored.

The recognition settings for OmniPage OCR/ICR are the same as RecoStar except for the languages list. OmniPage only supports languages, but not the countries. RecoStar language and country settings are converted to corresponding OmniPage languages at runtime. If a language/country is not supported by OmniPage, English is used by default.

If you have a need to use the RecoStar OCR engine for a period of time after upgrading to Kofax PSICapture 7.9.0, contact Kofax Technical Support for assistance.