

Kofax Capture

9

Kofax Capture Export Connector - Email Release Notes



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Introduction

These release notes contain information about the installation and use of Kofax Capture Export Connector - Email (also referred to as Email Export Connector). The export connector enables you to route documents to an email server via email messages.

During the export connector setup, you configure your email server properties (such as the server host or IP address name) and specify Kofax values that provide email settings (such as the sender's and recipients email address).

Tip For Kofax Front Office Server users, lookup lists for fax numbers and email addresses can be created for use in the Kofax Front Office Server Web Client. See the *Kofax Front Office Server Administrators Guide* for instructions.

Highlighted Features for the Kofax Capture Export Connector - Email

The export connector provides you with the following features:

- Ability to send an email message to one or more email addresses
- Ability to specify your email server properties (such as the port number)
- Support for the following types of email servers:
 - SMTP
 - Microsoft Exchange
- Ability to specify the email information (such as the sender's and recipient's address) based on Kofax Capture data
- Ability to add image files as attachments to the email messages, including setting up the naming convention for the attached files
- Support for the following file formats / compression formats:
 - JPG - JPEG Compression
 - Multipage TIFF - CCITT Group 3
 - Multipage TIFF - CCITT Group 3/2-D
 - Multipage TIFF - CCITT Group 4
 - Multipage TIFF - JPEG Compression
 - Multipage TIFF - Uncompressed
 - PCX - PackBytes
 - Single-page TIFF - CCITT Group 3
 - Single-page TIFF - CCITT Group 3/2-D
 - Single-page TIFF - CCITT Group 4
 - Single-page TIFF - JPEG Compression
 - Single-page TIFF - Uncompressed
- Support for Kofax PDF

You can export Kofax PDF documents. Kofax PDF is bundled with Kofax Capture and does not require additional software implementation. Kofax PDF documents can be saved in the following output types:

 - Kofax PDF Image Only

- Kofax PDF Image + Text
- Support for eDocument

eDocuments are supported for exporting. All the documents you want in a batch can be processed together regardless of file type.

For more information about eDocument files, refer to the Kofax Capture Help (Kofax Capture Help keyword: *eDocuments > understanding*). You can display Kofax Capture Help from the Help menu available from any Kofax Capture module. Alternatively, you can click Start | Programs | Kofax Capture | Kofax Capture Help.

- Support for OCR full text

You can export documents processed through the Kofax Capture OCR Full Text module.

Installing Kofax Capture Export Connector - Email

The setup file for the export connector is provided on the Kofax Capture 9 installation media. Before you install the export connector, be sure you meet the system requirements.

System Requirements

To successfully install and use the export connector, Kofax Capture 8.0 or 9.0 is required.

Optionally, you may want to install Service Pack 4 or later for Kofax Capture 8.0. Available only with the service pack 4, a text constant enhancement enables you to include a combination of Kofax Capture Values, batch fields, and index fields with the standard text constant. For details about the enhanced text constant, see the Help for the export connector.

Important To install the export connector, you must have Windows administrator privileges. If you do not have administrator privileges when attempting to install this export connector, you may receive error messages and several of the files may not install correctly.

Installing the Export Connector

You can install the export connector on a Kofax Capture client or standalone workstation. Also, you can repair the export connector.

► **To install the export connector**

- 1 On the Kofax Capture 9 installation media, locate the kcec-email.msi file.
- 2 Run the kcec-email.msi file.
- 3 When the installation wizard appears, follow the instructions.

When the installation is complete, a message appears that indicates the export connector was successfully installed.

Installing the export connector automatically registers it with Kofax Capture.

Repeat this procedure on all Administration and Export workstations that will use the export connector.

► **To repair the export connector**

- 1 Run the kcec-email.msi file.

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 the repair is complete, a message appears that indicates the export connector was successfully repaired.

Setting Up Kofax Capture Export Connector - Email

Once you have associated a document class with a batch class in Kofax Capture, you may specify the export connector to use when exporting your documents.

► **To set up the export connector**

- 1 Start the Kofax Capture Administration module.
- 2 On the Batch tab, expand the batch class to select associated document classes. Then, right-click the applicable document class.
- 3 On the displayed menu, select Export Connectors.

The Export Connectors window lists all available export connectors. Available export connectors are those that are registered with Kofax Capture.

- 4 Under Available Export Connectors, select Email Export Connector and click Add.
- 5 In the Kofax Capture Export Connector - Email Setup window, specify the settings for exporting documents. For detailed information, display Help for the export connector.

About User Name and Sender Address Fields

The “User name” and “Sender address” fields are used differently for Microsoft Exchange and SMTP:

- Server Tab | User Name Field
 - For Microsoft Exchange: The name used for authentication when logging on to the email server and is also the name of the user who will be the sender of all emails.
 - For SMTP: The name used for authentication when logging on to the email server.
- Email Settings Tab | Sender address
 - For Microsoft Exchange: When the email is received and the receiver replies to it, this address will populate the To field.
 - For SMTP: Used to indicate the email address that is sending the email message.

Modifying the Kofax Capture Export Connector - Email Source Code

The source code is provided for the export connector on the Kofax Capture 9 installation media. The source code can be opened, edited, and compiled in Microsoft Visual Studio 2005. For assistance, see the Microsoft Visual Studio 2005 documentation.

Important In order to successfully modify and compile the export connector, development must occur on a workstation with the appropriate version of Kofax Capture and ILMerge previously installed.

ILMerge is a utility for merging multiple .NET assemblies into a single .NET assembly. It works on executables and DLLs alike and comes with several options for controlling the processing and format of the output. For information, go to the Microsoft Download Center.

To use the modified export connector, you must copy files from the \Publish folder to the Kofax Capture \bin folder on the client workstation. If you receive an access denied error, you need to close the Administration module.

► **To modify the export connector**

- 1 On the Kofax Capture 9 installation media, locate the kcec-email-source.zip file. Copy the file to an appropriate location on your workstation and unzip the file.
- 2 Open, make any desired modifications, and compile the export connector source code in Microsoft Visual Studio 2005.
- 3 Copy the files in the \Publish folder to the Kofax Capture \bin folder (for example, C:\Program Files\Kofax\Capture\Bin\).

If you are prompted to replace any existing file, select Yes.

You need to repeat this procedure on each Administration and Export workstation that will be using the export connector.

Processing Batches

The following information is provided in these release notes to enhance your understanding exporting batches. The information is also available in the existing Kofax Capture user documentation.

For more information about batch classes, see the Kofax Capture Help (Kofax Capture Help keyword: *Batch classes > about*). For more information about configuring the Export module, see the Kofax Capture Help. You can display Kofax Capture Help from the Help menu available from any Kofax Capture module. Alternatively, you can click Start | Programs | Kofax Capture | Kofax Capture Help.

Publishing a Batch Class

After you select all your batch class settings, you must publish your batch class before you can use it. The publishing process checks the integrity of the settings in your batch class, and makes the batch class available for use. If problems are found with any of the settings, error and warning messages appear along with the recommended actions for fixing the problems.

If you ever decide to edit your batch class, you must publish your batch class again before your changes can be used. Your changes are not applied to batches created before the new publication date.

Run some sample batches through the system to test the operation of the export connector.

► **To publish a batch class**

- 1 Start the Kofax Capture Administration module.
- 2 On the Batch class tab, right-click the applicable batch class.
- 3 On the context menu, select Publish.”
- 4 In the Publish window, select your batch class and click Publish. Kofax Capture checks all of your batch class settings and displays the results in the Results box.
 - a If no problems are detected, the message “Publishing successful” appears.
 - b If problems are detected, error and/or warning messages appear along with the recommended actions to resolve the problems. Perform the recommended actions, and then try to publish the batch class again.

After successfully publishing, you can create batches based on your batch class. As your batches flow through your Kofax Capture system, they are routed from module to module. The modules that are used to process a batch, and the order that processing occurs, are specified as part of the batch class definition for the batch.

Exporting Batches

The Kofax Capture Export module processes batches based on the settings of the associated batch classes. The Export module is responsible for releasing (or exporting) documents, as well as index data, using the properties defined during export connector setup.

The Kofax Capture Export module usually runs as an unattended module on a Windows workstation, periodically polling the Export module for available batches. The Export module may be configured to run during off-hours to avoid any impact to the throughput of Kofax Capture and/or the network system. To start the Export module, select Start | Programs | Kofax Capture | Export. All batches queued for export will be exported after initiation of the Export module.

► **To export a batch**, start the Kofax Capture Export module.

The module’s main window appears. Any batches waiting to be exported are processed.

Once your batch is exported, it is removed from Kofax Capture. If any documents or pages are rejected, the batch is routed to the Kofax Capture Quality Control module.

► **To exit the Export module**, on the Batch menu, select Exit.

Removing Kofax Capture Export Connector - Email

You can remove the export connector after installing it. This process involves removing the export connector from any batches where it is being used, and then removing the export connector in the Export Connector Manager.

► **To remove the export connector from a batch**

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

► **To remove the export connector in the Export Connector Manager**

- 1 In the Kofax Capture Administration module, on the Tools menu, select Export Connector Manager.
- 2 In the Export Connector Manager window, select the export connector, and click Remove.

Additional Resources

This section gives information about Kofax resources that are available to assist you in using Kofax Capture 9.0 software.

Related Documentation

These release notes are a supplement to the following Kofax Capture documentation:

- *Kofax Capture Developer's Guide*
- *Kofax Capture API Reference Guide*
- *Kofax Capture Online Help*
- *Kofax Capture Getting Started Guide*
- *Kofax Capture Installation Guide*
- Help provided with any of the Kofax Capture modules
- Help provided with Kofax Capture Export Connector - Email

Your Kofax Capture documentation is available in your software package and from the Kofax Web site.

Help for the Export Connector

The export connector installs with its own Help file, containing up-to-date information about the export connector. The up-to-date Help topics for the export connector are displayed by clicking the Help button in the export connector setup window.

Training

Kofax offers both classroom and computer-based training that will help you make the most of your Kofax Capture solution. Visit the Kofax Web site at www.kofax.com for complete details about the training options and schedules.

Technical Assistance for Your Kofax Product

Support for your Kofax product is provided by your primary application support provider, which is specified as part of the maintenance agreement associated with your purchase. Please contact your Kofax application support provider for technical assistance.

- For more information about your product, visit the Kofax Support pages at www.kofax.com for:
- Product information and release news
- Access to the Kofax Knowledgebase
- Access to the online Case Management System (for eligible customers)
- Downloadable product documentation

Before contacting your Kofax application support provider, please gather the following information where applicable:

- Product name, version, and serial number
- Log files
- Product license
- Exact error message(s)
- Reproduction scenario

