

# Kofax Communication Server

## TC/LINK-RS FileNet Integration Technical Manual

Version: 10.2.0



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# 1. About This Manual

This document explains how to use the **Kofax Export Connector 8.2.0 for IBM FileNet Content Manager** together with TC/LINK-RS (KCS Link to export connectors).

The Kofax Export Connector 8.2.0 for IBM FileNet Content Manager supports the FileNet Content Manager versions 3.0 and 3.5. Together with TC/LINK-RS, this release script releases fax images and fax metadata from the TCOSS Server into FileNet Content Manager.

Please read these release notes carefully as they contain information not included in the Kofax Capture printed documentation or online help.

## **Additional Documentation**

This document is a supplement to the following:

- Online help provided with the Kofax Export Connector 8.2.0 for IBM FileNet Content Manager
- Release Notes of the Kofax Export Connector 8.2.0 for IBM FileNet Content Manager  
Appendix B of the Release Notes is a quick reference on setting permissions in FileNet Content Manager.
- TC/LINK-RS Manual

For more information about FileNet Content Manager or other FileNet products, contact your FileNet Content Manager representative or refer to the documentation that came with your FileNet Content Manager product.

## 1.1 System Requirements

This section lists the supported FileNet Content Manager versions as well as the system requirements for installation of the Kofax Export Connector 8.2.0 for IBM FileNet Content Manager.

### 1.1.1 FileNet Content Manager Server Support

The Kofax Export Connector 8.2.0 for IBM FileNet Content Manager requires the following network server components:

- FileNet Content Manager Content Engine version 3.0 or FileNet Content Manager Content Engine version 3.5
- FileNet Content Manager supported database

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**Note** Please consult the Release Notes of the Kofax Export Connector 8.2.0 for IBM FileNet Content Manager for a list of tested FileNet Content Manager Server versions.

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### 1.1.2 Requirements for TC/LINK-RS Computer

**Operating system:** See Kofax Cross Product Compatibility Matrix.

**Additional software requirements:**

- The Microsoft .Net runtime files must be installed. These files are needed by the TCReleaseConfig application, which is installed together with TC/LINK-RS. You can download the .Net runtime version 2.0 from the Microsoft web page
- TC/LINK-RS  
The TC Link to Release Scripts must be installed prior to installation of the release script.
- One of the following FileNet Content Manager components:
  - FileNet Content Manager Content Engine Client Connectivity component version 3.0
  - FileNet Content Manager Administrative Tools component (also known as FileNet Content Manager Enterprise Manager)
  - FileNet Content Manager Content Engine Client Connectivity component version 3.5

## 2. Source Code

The source code for the Kofax Export Connector 8.2.0 for IBM FileNet Content Manager is provided and it is located on the Kofax Export Connector 8.2.0 for IBM FileNet Content Manager 3.0 installation CD. Note that two source code projects are provided on the installation CD. Either source code project can be opened, edited, and compiled in Visual Basic 6.0 with Service Pack 6.

### **To modify the release script:**

- 1) Install the FileNet Content Manager release script. Refer to *Installing the Release Script* on page 16 for the installation instructions. When you install the FileNet Content Manager release script, you will install the required components referenced in the source code.
- 2) Open the FileNet Content Manager release script, make any desired modifications, and compile the FileNet Content Manager source code in Visual Basic.
- 3) Copy the P8Rel3\_v7.dll or KfxP8\_v7.dll to the installation directory (for example, C:\Program Files\Ascent\CAP\P8Rel3\_v7).  
Note that two source code DLL projects are provided with the Kofax Export Connector 8.2.0 for IBM FileNet Content Manager. The project in the "ReleaseScript" folder on the installation CD contains the source code for the release script (P8Rel3\_v7.dll), and the project in the "KfxP8" folder on the installation CD contains the source code for the release script connector (KfxP8\_v7.dll). You can modify either DLL file.
- 4) When you are prompted to replace the existing file, select "Yes." You will need to repeat this procedure on each TC/LINK-RS workstation that will be using the FileNet Content Manager release script.

---

**Note** In order to successfully modify and compile the release script, development must occur on a workstation with the appropriate versions of TC/LINK-RS, TCReleaseConfig, CAPTools, and the FileNet Content Manager release script previously installed. To use the modified release script, you must replace the FileNet Content Manager release script P8Rel3\_v7.dll or the KfxP8\_v7.dll with the modified version on the client workstation. If you receive an access denied error, you will need to close the TCReleaseConfig and TC/LINK-RS.

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Refer to the documentation that came with your FileNet Content Manager product and Visual Basic documentation for assistance.

## 3. Features

This section contains information about features provided with the Kofax Export Connector 8.2.0 for IBM FileNet Content Manager.

The Kofax Export Connector 8.2.0 for IBM FileNet Content Manager provides an easy-to-use setup dialog box available from the TCReleaseConfig application. The Kofax Export Connector 8.2.0 for IBM FileNet Content Manager 3.0 — Release Setup dialog box allows you to specify release settings that control how documents and metadata are released into the FileNet Content Manager object store.

### 3.1 Kofax Capture Values / FileNet Content Manager Properties

The Kofax Export Connector 8.2.0 for IBM FileNet Content Manager provides an easy-to-use interface for linking Kofax Capture Values to FileNet Content Manager document properties and folder properties.

The main types of Kofax Capture Values are Document index fields, Batch fields, Kofax Capture Values and Text Constants.

The names of “required” FileNet Content Manager properties within a document class or folder class are marked with an asterisk (\*), giving you a visual indicator that certain fields must be linked.

### 3.2 Document Storage

With the Kofax Export Connector 8.2.0 for IBM FileNet Content Manager, you can specify new or existing folders for storing documents in the FileNet Content Manager object store for release. You can use Kofax Capture Values to specify a document name or folder name.

### 3.3 Folder Creation

When releasing to user-defined folders, the release script searches the FileNet Content Manager object store to locate a folder based on the Folder Name property and the location of the FileNet Content Manager object store.

If the folder is found, this folder will be used for release. The existing properties of the folder will not change, even if Kofax Capture Values are linked to the properties for the folder.

If the folder is not found, a new folder is created in FileNet Content Manager using the values specified at release setup.

### 3.4 Release Script Information Interchange Supported

The Kofax Export Connector 8.2.0 for IBM FileNet Content Manager supports the Kofax Capture Release Script Information Interchange feature. This feature allows the release scripts to pass information to other release scripts.

Refer to *Sharing Data Among Release Scripts* on page 15 for more information.



### 3.5 FileNet CM Integrated Login Feature Supported

The Kofax Export Connector 8.2.0 for IBM FileNet Content Manager supports and uses the FileNet Content Manager Integrated Login feature. This feature will use your Windows domain name, user name, and password from your operating system to automatically log you in to release setup.

Refer to *Logging On to the Release Script* on page 20 for more information about the Integrated Login feature.

### 3.6 FileNet Content Manager Object Store

When setting up the Kofax Export Connector 8.2.0 for IBM FileNet Content Manager, you can easily select the FileNet Content Manager object store to use for your released documents.

### 3.7 Choice List Properties Supported

FileNet Content Manager Choice List properties are supported. To enable releasing to the FileNet Content Manager object store, you must know the choice list values and link appropriate Kofax Capture Values to the Choice List properties. Note that Choice List properties are not visually different from non-choice list properties.

For more information about the FileNet Content Manager Choice List properties, refer to the documentation that came with your FileNet Content Manager product.

### 3.8 Duplicate Documents

The Kofax Export Connector 8.2.0 for IBM FileNet Content Manager allows you to select the behavior to occur at release time when a released document has the same Document Title property as another document that exists in the same folder location within the FileNet Content Manager object store.

You can specify that the duplicate document be released to the object store or rejected.

### 3.9 Release Working Directory

The Kofax Export Connector 8.2.0 for IBM FileNet Content Manager requires that you set up a temporary storage location to copy document images at release time. Your images reside in this location temporarily as they are transferred from TC/LINK-RS to the FileNet Content Manager object store.

If the release working directory does not exist at release setup, you will be given the option to create the specified directory or select a different directory. On the other hand, if the directory does not exist at release time, the directory will automatically be created.

## 3.10 Multiple Values

The Kofax Export Connector 8.2.0 for IBM FileNet Content Manager supports properties that contain multiple values. You can specify the desired delimiter to separate the values when entering multiple values for your document and folder class properties using the Multi-value separator option as specified on the General Settings tab. For example, if you specified a single semi-colon (;) delimiter for the multi-value separator, you would enter the following:

```
apple;orange;pear
```

Refer to *Multi-Value Separator Option* on page 13 for more information.

## 3.11 Multiple Release Supported

The Kofax Export Connector 8.2.0 for IBM FileNet Content Manager supports the Multiple Release feature. This feature allows you to assign multiple release scripts to a document class.

In addition, this release script allows you to provide a unique name for your script configuration at release setup time. The name is used to refer to your release setup in the Release Setups panel of the TCReleaseConfig application.

## 3.12 Online Help Available for Release Setup

The Kofax Export Connector 8.2.0 for IBM FileNet Content Manager Help is installed with your release script. It is available from the TCReleaseConfig application when you are setting up your release script.

You can click the Help button from the Kofax Export Connector 8.2.0 for IBM FileNet Content Manager 3.0 — Release Setup dialog box to display help information about release options.

Please note that the online help text explains using the script with Kofax Capture and holds no information about integration with TC/LINK-RS.

## 3.13 Image Support

This release script supports the following file formats / compression formats. Please note that some formats are only available in a full Kofax Capture installation, but not with TC/LINK-RS.

Format	Supported by TC/LINK-RS
Multipage TIFF with Group 3, Group 3/2D, and Group 4 Compression	Yes
Multipage TIFF — Uncompressed Image Format	Yes
Multipage TIFF with JPEG Compression	No
Single page TIFF with Group 3, Group 3/2D, and Group 4 Compression	Yes
Single page TIFF — Uncompressed Image Format	Yes
Single page TIFF — JPEG Compression	No
PCX — PackBytes	Yes
JPG — JPEG Compression	Yes
Kofax PDF	No

### **3.13.1 Kofax PDF: Not Supported by TC/LINK-RS**

The Kofax Export Connector 8.2.0 for IBM FileNet Content Manager offers image format Kofax PDF. Please note that TC/LINK-RS is not able to provide this image format.

Kofax PDF is bundled with Kofax Capture and is only available in a standard Kofax Capture installation.

### **3.13.2 OCR Full Text: Not Supported by TC/LINK-RS**

The current version of TC/LINK-RS does not provide OCR full text to the Kofax Export Connector 8.2.0 for IBM FileNet Content Manager. Support of textual data is planned for future releases though.

### **3.13.3 eDocuments: Not Supported by TC/LINK-RS**

The current version of TC/LINK-RS does not provide eDocuments to the Kofax Export Connector 8.2.0 for IBM FileNet Content Manager.

## 4. Additional Information

This section contains additional information about the Kofax Export Connector 8.2.0 for IBM FileNet Content Manager.

### 4.1 Binary and Object Properties Not Supported

The Kofax Export Connector 8.2.0 for IBM FileNet Content Manager does not support document classes or folder classes that contain the Binary or Object properties. Note the following:

- If Binary and/or Object properties are not required and are part of the selected document or folder class, the properties will be hidden.
- If Binary and/or Object properties are required and are part of the selected document or folder class, you will receive an error message at release setup when you attempt to select the document or folder class. In addition, you will not be able to select the document or folder class.

### 4.2 Refreshing FileNet Content Manager

All FileNet Content Manager information is refreshed in release setup when you log into the release script. This includes the available object stores, document classes, document properties, folder classes, folder properties, and existing folders. In addition, available document classes, folder classes, and existing folders are refreshed in release setup whenever you select an object store. However, if document and/or folder properties are changed in FileNet Content Manager while release setup is open, you must log out of the release script and log back in to see the latest properties.

### 4.3 Skip First Page

The “Skip first page of each document” option as specified on the General Settings tab, allows you to discard the first page of each document from the image. However, if you are releasing only one image in a document and you select this option, release will fail.

Skipping the first page is supported with TC/LINK-RS, although it does not make much sense for fax messages.

### 4.4 Document and Folder Names

The following sections explain the Document Title property and Folder Name property.

#### 4.4.1 Document Title Property

You can use the Document Title property to specify a name for your released document. This property will always appear first in the Content Manager Properties list as specified on the Document Settings tab. Note that this is not a required property.

Refer to Document Title Property on page 12 for more information about a known problem.

## 4.4.2 Folder Name Property

You can use the Folder Name property to specify a name for your release folder. This property will always appear first in the Content Manager Properties list as specified on the Folder Settings tab. This is a required property. Required folder properties are shown with an asterisk in front of their names (for example, \*Folder Name). You must provide an Kofax Capture Value for all required folder properties.

If the Folder Name property resolves to a NULL value, the document will be rejected and release will fail.

### Invalid Folder Name Characters

The Folder Name property cannot contain the following characters:

- Asterisk (\*)
- Backslash (\)
- Colon (:)
- Greater than sign (>)
- Less than sign (<)
- Pipe (|)
- Question mark (?)
- Quotation marks ("")
- Slash mark (/)

## 4.5 Multi-Value Separator Option

The Multi-value separator option as specified on the General Settings tab, allows you to enter only valid printable ASCII characters. This option cannot contain the following characters:

- Carriage return
- Escape
- New line
- Space
- Tab

The Kofax Export Connector 8.2.0 for IBM FileNet Content Manager allows you to enter additional delimiters between the values to indicate blank or NULL values. For example:

bowling;fishing;;golfing;;;racing;swimming

The blank or NULL value will be converted to an empty string when released to FileNet Content Manager. However, the following FileNet Content Manager data types do not accept empty strings:

- Boolean
- DateTime

- Float
- ID
- Integer

The document will be rejected and release will fail.

---

**Warning** The Multi-value separator should not be part of your value. For example, if you specify a period (.) as one of your values and you specify the period as the Multi-value separator, the release script will assume the value is the separator. In addition, if you use the Multi-value separator for a single-value property, the literal string will be used.

---

For more information about the Multi-value separator, refer to the Kofax Export Connector 8.2.0 for IBM FileNet Content Manager Help (Help keyword: Multi-value separator).

## 4.6 Viewing Content Elements

In FileNet Content Manager, if you attempt to view the content elements of a released document, you will only be able to directly view the first content element in the list. In order to view the remaining content elements, you must open the properties of the released document and select the Content Element tab. Then, double-click on any one of the content elements in the list to view.

## 4.7 Viewing Duplicate Documents

The “Release duplicate document” option on the Document Settings tab allows you to release a duplicate document to the FileNet Content Manager object store with the same document name.

However, in the FileNet Content Manager Administrative Tools component (also known as the FileNet Content Manager Enterprise Manager) documents are displayed as new documents. No document versioning will occur. All duplicate documents will be released with a sequential whole number. Note that this release script does not append a number to the end of the Document Title property.

To illustrate, consider an object store that already contains the following released documents:

```
TapDoc  
Guide (3)
```

If you release two more documents to the same FileNet Content Manager object store with identical file names as the above released documents, the file names will display in the FileNet Content Manager Administrative Tools component as:

```
TapDoc (1)  
Guide (4)
```

When releasing documents that already exist in the FileNet Content Manager Administrative Tools component with the same file name, the first duplicate document is always assigned with the number 1. Each additional duplicate document will increase the number by one whole number (for example, 2, 3, 4).

---

**Note** This behavior does not occur in the FileNet Content Manager Workplace Thin client. For more information, refer to the documentation that came with your FileNet Content Manager product.

---

## 4.8 Sharing Data Among Release Scripts

The Kofax Capture Release Script Information Interchange feature is useful when more than one release script has been configured for a particular batch class and document class combination.

The sharing of information is accomplished by allowing the release scripts to pass information to other release scripts. The Kofax Capture Value {Repository Document ID} is used to store and retrieve the RepositoryDocumentID that will be used by the first invoked release script. Therefore, the first release script that runs can set this value, and subsequent release scripts can read the same value.

Notice that when you are passing the RepositoryDocumentID information to a different release script, the release script must exist within the same document class using multiple release. In addition, the release script that is passing the RepositoryDocumentID information must be the first that is assigned to a user. For example:

- Kofax Export Connector 8.2.0 FileNet Content Manager
- Kofax Capture Text

Only the first release script can set the RepositoryDocumentID value. Subsequent release scripts can only read this value.

## 5. Installing the Release Script

You must install the Kofax Export Connector 8.2.0 for IBM FileNet Content Manager on every TC/LINK-RS workstation.

### 5.1 Important Note About Installation

To install the Kofax Export Connector 8.2.0 for IBM FileNet Content Manager, you must have Windows administrator privileges. If you do not have administrator privileges and install this release script, you may receive error messages and several of the files may not install correctly.

Before you install the Kofax Export Connector 8.2.0 for IBM FileNet Content Manager, refer to *System Requirements* on page 5 for information about installation requirements.

### 5.2 Installation Instructions

Use the following instructions to install the Kofax Export Connector 8.2.0 for IBM FileNet Content Manager.

Before installing the release script, TC/LINK-RS must be installed on the computer. When running TC/LINK-RS setup for the first time, please select the checkbox Install CAP tools during TC/LINK-RS installation.

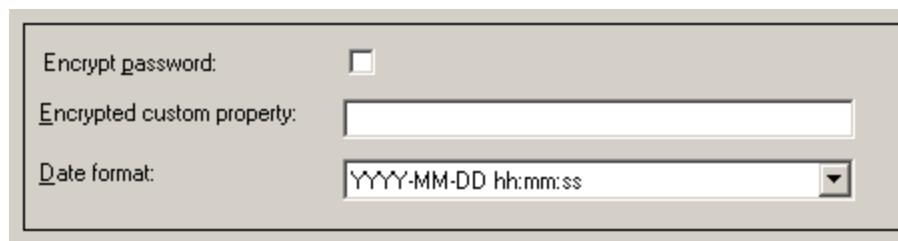
To install the release script

- 1) Insert your Kofax Export Connector 8.2.0 for IBM FileNet Content Manager 3.0 installation CD into your CD drive.
- 2) From your Windows task bar, select Start | Run, browse to the FileNet\CM3 folder on the CD, and run Setup.exe. The installation program will start.
- 3) Follow the instructions on the screen to install the release script.
- 4) When the installation is complete, a message will display that indicates the release script was successfully installed.
- 5) Start the TCReleaseConfig application to register the release script in the TC/LINK-RS configuration folder: In the Release scripts panel, click the Add button and select the file P8REL3\_v7.INF in the working folder of the Kofax Export Connector 8.2.0 for IBM FileNet Content Manager, then click Install.
- 6) The Release scripts panel now contains an item "Ascent 7.0 FileNet Content Manager 3.0". Select this item and click Display. Configure date format and encryption settings as displayed in *Figure 1* on page 17.

**Note** Selecting password encryption is not necessary as the release script itself encrypts the password.

- 7) Repeat this procedure on all TC/LINK-RS workstations that will use the FileNet Content Manager release script.





The image shows a configuration window with a light gray background and a thin black border. It contains three settings:

- Encrypt password:** A checkbox that is currently unchecked.
- Encrypted custom property:** A text input field that is empty.
- Date format:** A dropdown menu showing the format "YYYY-MM-DD hh:mm:ss".

Figure 1. Date format

## 6. Application Maintenance

This section describes how to repair and remove the Kofax Export Connector 8.2.0 for IBM FileNet Content Manager.

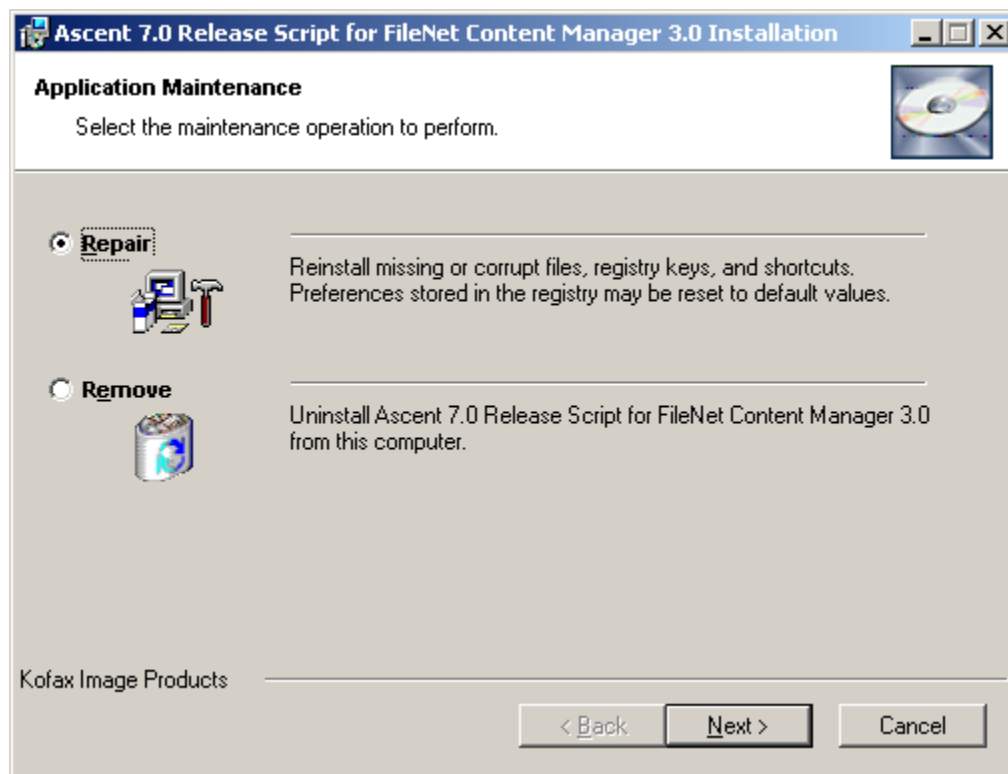


Figure 2. Application Maintenance Dialog Box

### 6.1 Repairing the Release Script

The Repair option replaces missing, renamed, or deleted files.

#### To repair the release script

- 1) Insert your Kofax Export Connector 8.2.0 for IBM FileNet Content Manager 3.0 installation CD into your CD drive.
- 2) From your Windows task bar, select Start | Run, browse to the FileNet\CM3 folder on the CD, and run Setup.exe.
- 3) Setup will detect an existing installation and the Application Maintenance dialog box will display, as shown in *Figure 2*.
- 4) From the Application Maintenance dialog box, select “Repair” and then click Next.
- 5) Follow the instructions on the screen to repair the release script.

- 6) When the repair is complete, a message will display that indicates the release script was successfully installed.

## 6.2 Removing the Release Script

The Remove option will delete the release script.

To remove the release script

- 1) Insert your Kofax Export Connector 8.2.0 for IBM FileNet Content Manager 3.0 installation CD into your CD drive.
- 2) From your Windows task bar, select Start | Run, browse to the FileNet\CM3 folder on the CD, and run Setup.exe.
- 3) Setup will detect an existing installation and the Application Maintenance dialog box will display, as shown in Figure 2 on page 18.
- 4) From the Application Maintenance dialog box, select "Remove" and then click Next.
- 5) Follow the instructions on the screen to delete the release script.
- 6) When the uninstallation is complete, a message will display that indicates the release script was successfully uninstalled.

Alternatively, you can use the Add or Remove Programs utility from the Windows Control Panel to uninstall the Kofax Export Connector 8.2.0 for IBM FileNet Content Manager.

Refer to your Microsoft documentation for more information about the Add or Remove Programs utility.

Refer to *Problems When Uninstalling the Release Script* on page 30 for information about a known problem.

---

**Note** After uninstalling, the Kofax Export Connector 8.2.0 for IBM FileNet Content Manager will continue to display in the TCReleaseConfig application, although it will not be functional. . To remove the release script from the list, you must select the applicable release script from the Release scripts panel in TCReleaseConfig and click Delete.

---

## 7. Logging On to the Release Script

Once you have installed the release script and associated a document class with a batch class in TCReleaseConfig, you may specify the release script to use when releasing your documents.

To release to FileNet Content Manager, the process user of TC/LINK-RS must have the following:

- A valid FileNet Content Manager user name and password
- Permissions to create new objects and modify existing objects
- Permissions to connect to the FileNet Content Manager object store

The same permissions are needed for configuring the release script via TCReleaseConfig.

Contact your FileNet Content Manager administrator for assistance.

### To log on to the release script

- 1) Start the TCReleaseConfig application and log on to the configuration of the correct TC/LINK-RS instance.
- 2) Open the Release setups tab and click the Add button. In the New Release Setup dialog, select the correct document class and select the release script "Ascent 7.0 FileNet Content Manager 3.0". Click OK.
- 3) The FileNet Content Manager Login Information dialog box will display, as shown in *Figure 3* on page 21.
- 4) This release script uses the FileNet Content Manager Integrated Login feature. As a result, the User name text box is automatically populated with the login information (domain name and user name) from your operating system.  
Note that if you do not enter a password, the release script will attempt to log on to FileNet Content Manager using the login password from your operating system. If the release script does not succeed, then it will attempt to log on using only your user name without a password. If the Integrated Login does not succeed, you will need to enter your FileNet Content Manager password.

The release script supports the following formats:

< Domain name>\< User name>  
< User name>@< Domain name>  
< User name>

The domain and user names are not case-sensitive.

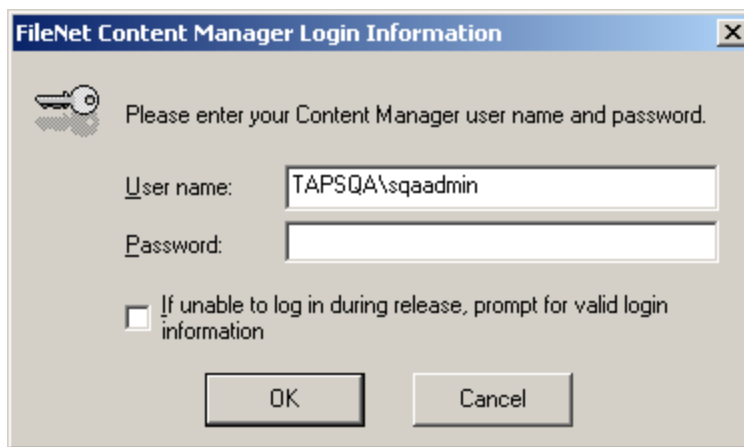


Figure 3 FileNet Content Manager Login Information Dialog Box

---

**Note** The login information will be saved and used during release.

---

- 5) Do not select the “If unable to log in during release, prompt for valid login information” check box. Otherwise, the release script tries to prompt for a user ID and password if it is not able to log in to Content Manager at release time. As release is invoked by TC/LINK-RS (in a service and potentially without a user login session), such a prompt would be unrecognized and would cause problems.
- 6) Click OK. The Kofax Export Connector 8.2.0 for IBM FileNet Content Manager 3.0 – Release Setup dialog box will display, as shown in *Figure 4* on page 22.

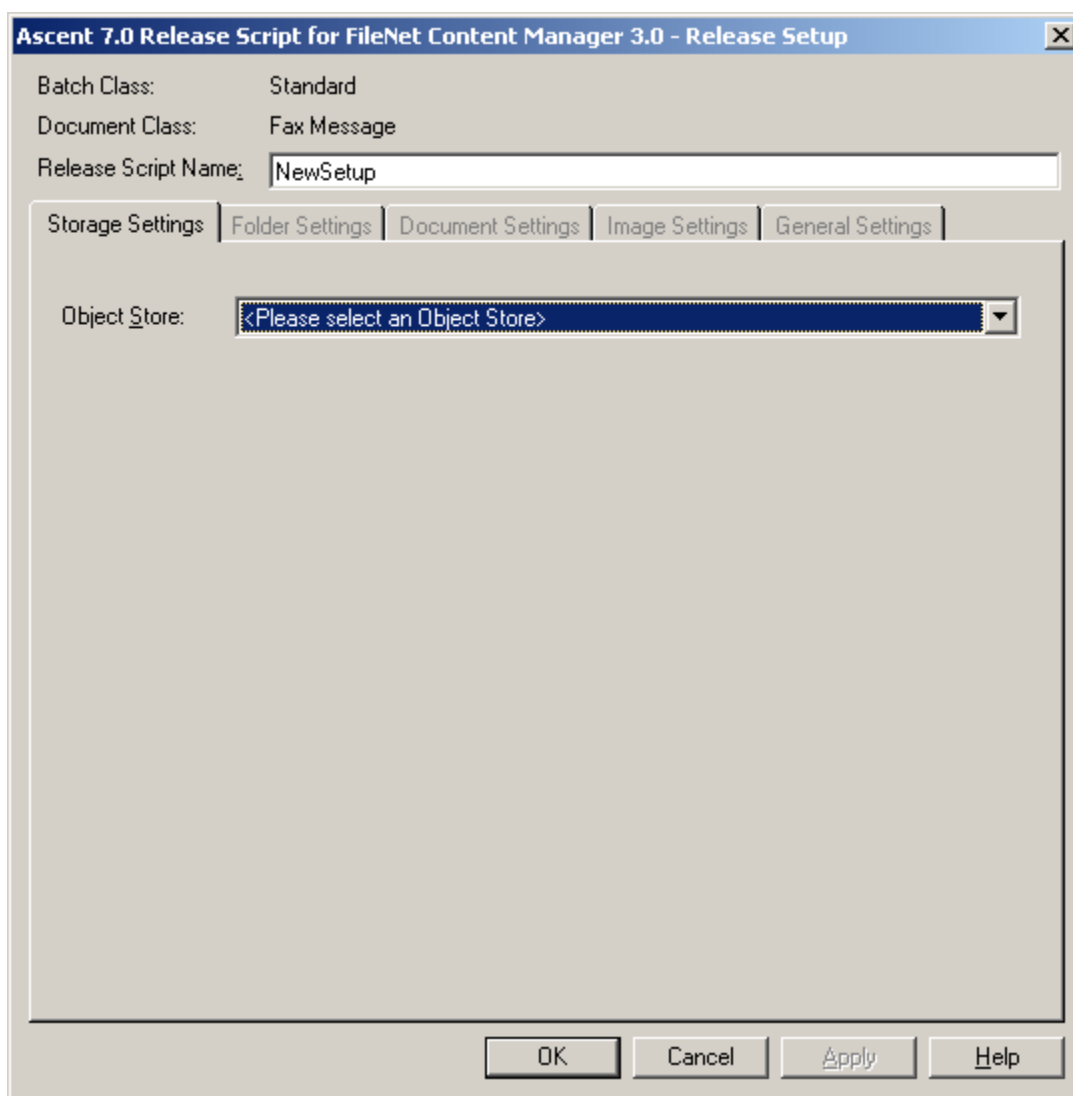


Figure 4. Kofax Export Connector 8.2.0 for IBM FileNet Content Manager 3.0 – Release Setup Dialog Box

- 7) Refer to the next section, *Setting Up the Release Script*, for information about the set up options.

## 8. Setting Up the Release Script

The following sections describe the setup options available with the Kofax Export Connector 8.2.0 for IBM FileNet Content Manager.

**Note** For more details about the setup options, refer to the Help available from the Kofax Export Connector 8.2.0 for IBM FileNet Content Manager 3.0 – Release Setup dialog box.

### 8.1 Storage Settings Tab

This tab allows you to specify the desired FileNet Content Manager object store to be used for release.

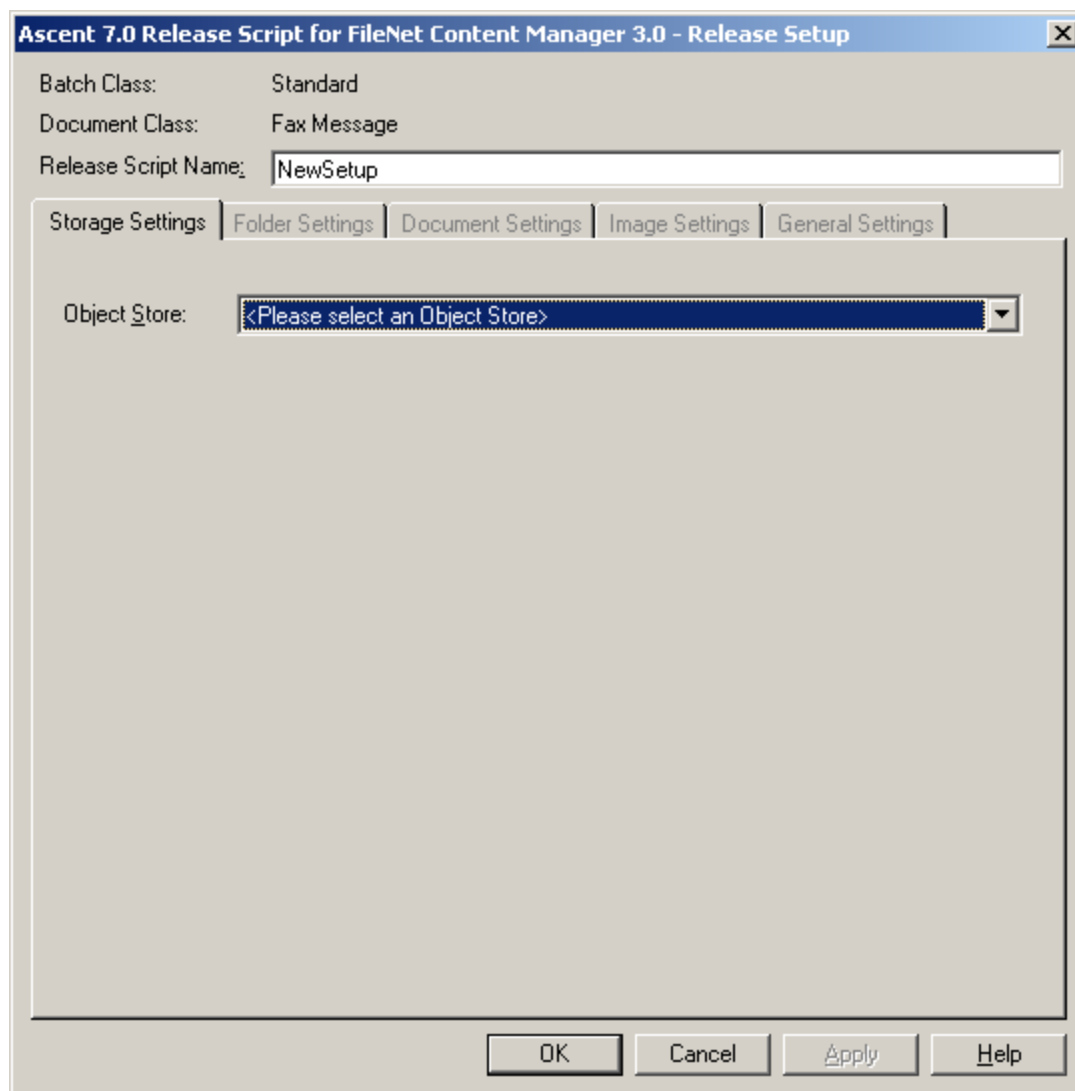


Figure 5. Storage Settings Tab

## 8.2 Folder Settings Tab

This tab allows you to specify new or existing folders to use for storing documents in the FileNet Content Manager object store.

The screenshot shows a Windows-style dialog box titled "Ascent 7.0 Release Script for FileNet Content Manager 3.0 - Release Setup". It has a tabbed interface with five tabs: "Storage Settings", "Folder Settings" (which is selected), "Document Settings", "Image Settings", and "General Settings".

At the top, there are three labels and their corresponding values: "Batch Class:" with value "Standard", "Document Class:" with value "Fax Message", and "Release Script Name:" with a text box containing "FileNet1".

Below the tabs, the "Folder Settings" tab is active. It contains a "Path:" label followed by a text box showing the path "FNP8 FileStore A > Root Folder > TopCall >".

Below the path, there is a folder tree view. It shows a folder icon labeled "DEVELOP" which contains a sub-folder icon labeled "OwnID". To the right of this view are three buttons: "Browse Folders", "Add Folder", and "Delete Folder".

Below the folder tree, there is a "Folder Class" label followed by a dropdown menu currently set to "Folder".

At the bottom of the tab, there are two side-by-side text boxes. The left one is labeled "Content Manager Properties" and contains the text "\*Folder Name". The right one is labeled "Ascent Values" and contains the text "OwnID".

Below these text boxes, a note states: "Asterisk (\*) denotes the attribute is required."

At the very bottom of the dialog box are four buttons: "OK", "Cancel", "Apply", and "Help".

Figure 6. Folder Settings Tab



## 8.3 Document Settings Tab

This tab allows you to specify a Content Manager document class for the document to be released. In addition, you can assign Kofax Capture Values to properties of a document class.

The screenshot shows a Windows-style dialog box titled "Ascent 7.0 Release Script for FileNet Content Manager 3.0 - Release Setup". At the top, there are labels and values for "Batch Class: Standard", "Document Class: Fax Message", and "Release Script Name: FileNet1". Below these is a tabbed interface with five tabs: "Storage Settings", "Folder Settings", "Document Settings" (which is selected), "Image Settings", and "General Settings". Inside the "Document Settings" tab, there is a "Document Class:" label followed by a dropdown menu showing "Document". Below this is a table with two columns: "Content Manager Properties" and "Ascent Values". The table has one row with "Document Title" in the first column and "{\$Message ID}" in the second column. At the bottom of the tab, there is a text label "Asterisk (\*) denotes the attribute is required." and a group box labeled "If Document Exists" containing two radio buttons: "Release duplicate document" (which is selected) and "Reject duplicate document". At the very bottom of the dialog are four buttons: "OK", "Cancel", "Apply", and "Help".

Content Manager Properties	Ascent Values
Document Title	{\$Message ID}

Figure 7. Document Settings Tab

## 8.4 Image Settings Tab

This tab allows you to specify the desired image format for releasing your images.

**Note** TC/LINK-RS does not support some formats offered in this tab, including the Kofax PDF format. See section *Image Support* on page 10 for more information about supported image formats.

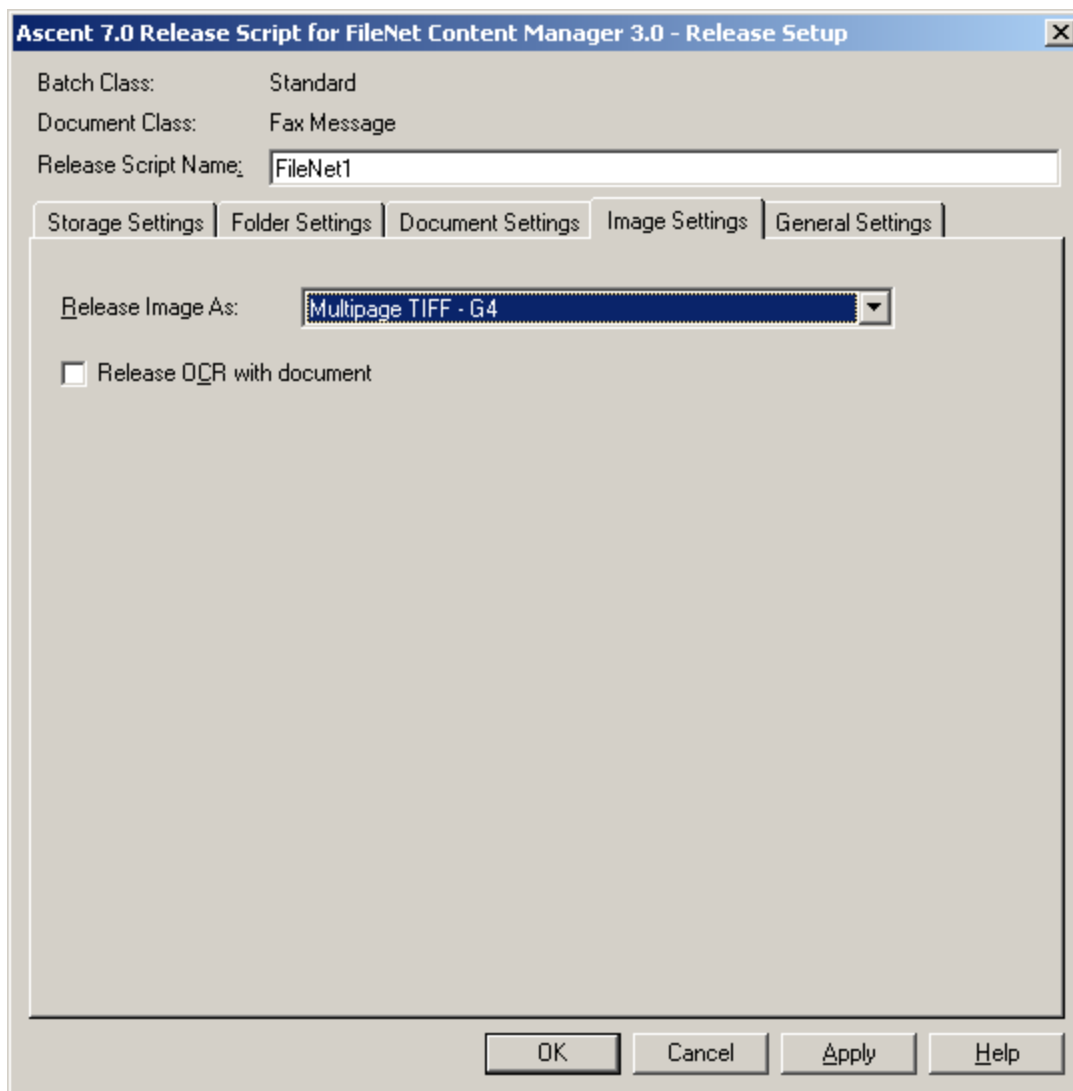


Figure 8. Image Settings Tab

## 8.5 General Settings Tab

This tab allows you to specify a temporary storage location to be used at release time and specify whether to skip the first page of each document. Skipping the first page is supported with TC/LINK-RS, although it does not make much sense for fax messages. In addition, you can specify a multi-value separator for your document and folder class properties.

The screenshot shows a Windows-style dialog box titled "Ascent 7.0 Release Script for FileNet Content Manager 3.0 - Release Setup". It has a tabbed interface with five tabs: "Storage Settings", "Folder Settings", "Document Settings", "Image Settings", and "General Settings". The "General Settings" tab is currently selected. At the top, there are three labels with corresponding values: "Batch Class:" with "Standard", "Document Class:" with "Fax Message", and "Release Script Name:" with "FileNet1". Below the tabs, there is a section for "Release working directory:" with a text box containing "C:\TCOSS\TCLP\TMP\TCLINKRS" and a "Browse..." button to its right. Below this, there is a checkbox labeled "Skip first page of each document" which is currently unchecked. At the bottom of this section, there is a label "Multi-value separator (applicable to document and folder class properties):" followed by a small text box containing a semicolon (;). At the very bottom of the dialog box, there are four buttons: "OK", "Cancel", "Apply", and "Help".

Figure 9. General Settings Tab

## 8.6 Save Release Setup: Warnings About Unused Fields

When saving the release setup configuration, the script displays warning messages if not all Kofax Capture Values (index fields, batch fields) have been linked to Documentum document properties. You can ignore these messages.



Figure 10. Warning Message

## 9. Activating a Configuration

To activate a release setup configuration, you must assign it to a TCOSS user or (for global use) to a fax channel group on the TCOSS server.

Additionally, you have to define events that route messages to TC/LINK-RS.

Both steps are done via the application TCReleaseConfig and are described in detail in the TC/LINK-RS manual. This section contains only a short step by step description.

- 1) Select the release setup in the Release setups tab of TCReleaseConfig and click the Assign button.
- 2) In the Assignments dialog, type in or search for the name of the TCOSS user whose fax messages shall be released via this configuration. Use the Add button to add the name to the user list. Then click OK.
- 3) The Assignment status window opens. If there is no event defined for the user, you can use the context menu item Create event to create an event and set the event status to Enabled. Click OK to save your changes.
- 4) Send some sample messages to test the operation of the release script. The way of sending the test messages depends on the event type:  
To use the Inbound Release event of a user, send a fax to the user's fax number.  
To use the Outbound Release event of a user, log in to TCfW as this user, and compose and send a message to an external fax number.
- 5) Make sure that TC/LINK-RS is active. The event messages are routed to the TC/LINK-RS message queue, and TC/LINK-RS invokes the release script.
- 6) Check the resulting documents in FileNet Content Manager.

# 10. Known Problems

This section contains information about known problems with the Kofax Export Connector 8.2.0 for IBM FileNet Content Manager.

## 10.1 Problems When Uninstalling the Release Script

If you click the Cancel button while you are uninstalling the release script, all the release script original files will remain properly installed on the system. However, depending on the point during the uninstallation that the Cancel button is clicked, the release script may be un-registered.

In such a case, once you attempt to log on to the release script, login will fail. (SPR 31221)

**Workaround:** If this problem occurs, run Repair. Refer to Repairing the Release Script on page 18 for more information.

## 10.2 Document Title Property

You can use the Document Title property to specify a name for your released document. If the Document Title property resolves to a NULL value, the release script will not use the FileNet Content Manager Document Object ID to name the document. However, the Document Title property appears as if it is used by the FileNet Content Manager Object ID in the FileNet Content Manager Administrative Tools component. In the FileNet Content Manager Workplace Thin client the Document Title property will display “undefined name.” (SPR 00010817)

Note that once the document is released, you cannot search for the document using the blank name or the FileNet Content Manager Object ID.

**Workaround:** Specify a name for your released document.

## 10.3 Document and Folder Classes That Do Not Allow Instances

Document and Folder classes that do not allow instances are not displayed in the Kofax Export Connector 8.2.0 for IBM FileNet Content Manager. (SPR 00011903).

## 10.4 Keyboard Navigation on the Storage Settings Tab

If you use the UP ARROW key or DOWN ARROW key on your keyboard to move around in the Object Store drop-down list box and you navigate to a FileNet Content Manager object store that you do not have the appropriate permissions to access, you will receive an error message prompting you to select another object store. When you attempt to move up or down in the list using the keyboard, you will receive the same error message. In addition, the focus will remain on the object store that you do not have permission to access. (SPR 00012013).

**Workaround:** Use the mouse to navigate through the FileNet Content Manager object store list.

## 10.5 Using the At Sign (@) When Logging on to the Domain

When you are logging on to the FileNet Content Manager release script and using the At sign (@), you must enter the user name and domain name in the following format on the FileNet Content Manager Login Information dialog box. (SPR 00012304):

```
user name@domain name
```

**Warning:** Other combinations may work, but the release script only supports the above format when using the At sign (@). If you attempt to use an unsupported format or use the At sign in the user name, you will experience inconsistent behavior when trying to log on to the FileNet Content Manager release script.

## 10.6 Revoking User Permissions to the Object Store

If the permissions to a particular FileNet Content Manager object store have been suddenly revoked for the logged-in user and that user attempts to release a batch, the release will fail with the following error message. (SPR 00012367):

```
The user < UserName> is not authorized to the < ObjectStore> object store or the  
object store has been removed or renamed. Please verify that you have the  
appropriate permissions and the object store is available.
```

**Workaround:** Your system administrator will need to restore the access permissions to the FileNet Content Manager object store for the logged-in user. Then, the send order on TCOSS can be reactivated. Once the document is successfully released, the user's permissions can be revoked.

## 10.7 Removing or Renaming Folders in the FileNet CM Object Store

If a folder has been renamed or removed in your selected FileNet Content Manager object store, you will not receive a warning when you open release setup. At release, the document will be rejected.

**Workaround:** Recreate the folder.

## 10.8 Unexpected Behavior with the Release Working Directory

When you specify a UNC path for the Release working directory on the General Settings tab and that path does not exist, the FileNet Content Manager release script will give you the option to create the directory. If you click "Yes" to create the directory, you will then receive a warning message that the path is invalid and the Release working directory will not be created. (SPR 00011417)

**Workaround:** Specify an existing UNC path for the Release working directory.