

Kofax Export Connector for IBM Content Manager

Administrator's Guide

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The KOFAX logo is displayed in a bold, blue, sans-serif font. The letters are thick and closely spaced, with a consistent weight throughout the word.

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Preface

This guide includes the information you need to successfully install and configure Kofax Export Connector for IBM Content Manager 8.2.0. This Export Connector copies document images, OCR full text files, Kofax PDF documents, and eDocuments to permanent storage and writes data from Kofax Capture, Kofax TotalAgility, or Kofax Express into the IBM Content Manager repository.

If you downloaded this Export Connector from the Kofax Electronic Delivery site, you can extract the files from the ISO file.

System requirements

Most software requirements for Kofax Export Connector for IBM Content Manager, 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 from the [Kofax Knowledge Base](#).

Prerequisites

To install Kofax Export Connector 8.2.0 for IBM Content Manager successfully, follow this procedure.

1. Close all the Kofax applications and services, such as Kofax Capture, Kofax TotalAgility, or Kofax Express.
2. Install IBM Java v1.8 (32-bit).
3. Make sure that the path of the IBM Java folder installed in step 2 exists in the PATH environment variable's value.
Variable Name = PATH
Variable Value = ...;C:\IBM_SDK_Win_X86_32\eclipseDevelopmentPackage\ibm_sdk8\bin;....
4. Create an environment variable with the name "JAVA_32_HOME" and set the variable value to the path of the Java folder installed in step 2.
Variable Name = JAVA_32_HOME
Variable Value = C:\IBM_SDK_Win_X86_32\eclipseDevelopmentPackage\ibm_sdk8
5. Install and configure the Java OEM API toolkit according to the instructions in the Java OEM API toolkit documentation.
6. Create an environment variable with the name "IBM_CM_OEM" and set the variable value to the path of the Java OEM API toolkit folder installed in step 5.
Variable Name = IBM_CM_OEM
Variable Value = C:\IBM_CM_OEM_API
7. Add the IP address and server name to the host file.

Product documentation

The Kofax Export Connector for IBM Content Manager documentation set is available online at the following URL¹:

https://docshield.kofax.com/Portal/Products/KEC_IBMCM/8.2.0-09e46mutuz/IBMCM.htm

The full documentation set includes the following items:

Kofax Export Connector for IBM Content Manager Release Notes

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

Kofax Export Connector for IBM Content Manager Technical Specifications

Contains information on supported operating systems and other system requirements.

Kofax Export Connector for IBM Content Manager Administrator's Guide

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

Help for Kofax Export Connector for IBM Content Manager

Describes the configuration settings required to set up the Kofax Export Connector for IBM Content Manager application.

Offline documentation

To make the documentation available for use in offline mode, obtain the documentation files from the Kofax Export Connector 8.2.0 for IBM Content Manager product package that you downloaded from the [Kofax Fulfillment Site](#). The product package includes the following documentation files for offline use:

- *KofaxExportConnectorDocumentation_8.2.0_ForIBMContentManager_EN.zip*
Contains the entire product documentation set in English.
- *KofaxExportConnectorDocumentation_8.2.0_ForIBMContentManager_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 IBM Content Manager Administrator's Guide*
- The **help** folder: Contains *Help for Kofax Export Connector for IBM Content Manager*

1. After you install Kofax Export Connector 8.2.0 for IBM Content Manager, in the product installation folder, create the folder named **Documentation**.

¹ You must be connected to the Internet to access the full documentation set online. For access without an Internet connection, see "Offline 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.CMEE.8\Documentation\<language code folder> or
[drive:]\Program Files (x86)\Kofax\CaptureSS\ServLib\Bin
\Kofax.CMEE.8\Documentation\<language code folder>
```

- For Kofax Express:

```
[drive:]\Program Files (x86)\Kofax\Kofax Express\bin
\Kofax.CMEE.8\Documentation\<language code folder>
```

- For Kofax TotalAgility:

```
[drive:]\Program Files (x86)\Kofax\TotalAgility\ExportConnectors\bin
\Kofax.CMEE.8\Documentation\<language code folder>
```

Note The Documentation folder is not removed automatically in case the product is uninstalled, and you need to delete it manually.

4. Start the Kofax Export Connector for IBM Content Manager 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 Web site at www.kofax.com for complete details about the available training options and schedules.

Getting help with Kofax products

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

To access the Kofax Knowledge Base, go to the [Kofax website](#) and select **Support** on the home page.

Note 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.
- Access to the Kofax Customer Portal (for eligible customers).
Click the **Customer Support** link at the top of the page, and then click **Log in to the Customer Portal**.
- Access to the Kofax Partner Portal (for eligible partners).
Click the **Partner Support** link at the top of the page, and then click **Log in to the Partner Portal**.
- Access to Kofax support commitments, lifecycle policies, electronic fulfillment details, and self-service tools.
Scroll to the **General Support** section, click **Support Details**, and then select the appropriate tab.

Chapter 1

Install the Export Connector

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

Important To install the Export Connector, you must have Windows administrator privileges. If you do not have administrator privileges and install this Export Connector, error messages may occur. Also, before you install the Export Connector, verify that your environment meets the requirements listed in the [Prerequisites](#) section.

Upgrade process

This version of Export Connector supports a direct upgrade from the following existing versions:

- Kofax Export Connector 8.0.0 R2 for IBM DB2 Content Manager
- Kofax Export Connector 8.1.0 for IBM Content Manager

If you are upgrading from version 7.x of this Export Connector in a Kofax TotalAgility environment, see [Migrate configuration settings](#).

During a direct upgrade, the installer preserves the following configuration settings:

- All existing AppSettings
- All existing security bindings
- All HTTP URL rewrites to be done for Kofax Export Connector 8.2.0 for IBM Content Manager

Note Before you start the upgrade process, make sure that all the Kofax applications and services, such as Kofax TotalAgility, Kofax Capture or Kofax Express are stopped, and that the databases are backed up.

For upgrade instructions, see [Install export connector with Kofax Capture or Kofax Express](#) or [Install export connector with Kofax TotalAgility](#).

Install Export Connector with Kofax Capture or Kofax Express

Use this procedure to install or upgrade the Export Connector for use with Kofax Capture or Kofax Express.

1. If you currently have an earlier version of this Export Connector, verify that you have reviewed the [Upgrade process](#) section, and then do one of the following:
 - If you have version 8.0.0 R2 or 8.1.0, go to step 2.
 - If you have version 7.x or earlier, make a note of the configuration settings and then [remove](#) the connector, before you go to step 2.
2. On the installation media, locate and run **Setup.msi**.
3. Follow the instructions on the screen to install the Export Connector.
The installation wizard appears.
4. Click **Next** and follow the instructions on the screen to install the Export Connector.
5. Repeat the installation procedure on all Administration or Export workstations where you plan to use the Export Connector.
The Export Connector is automatically registered with Kofax Capture or Kofax Express.

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

6. Restart all the Kofax applications and services for Kofax Capture or Kofax Express.
7. Configure settings for the Export Connector. See [Set up the export connector](#).

Note For Kofax Capture, when you upgrade the Export Connector, you have to republish the batch class to update the Export Connector version and finalize the upgrade.

Select the language

Use one of the following procedures to select the export connector language. Your selection goes into effect after you restart Kofax Capture or Kofax Express.

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

Install Export Connector with Kofax TotalAgility

Use this procedure to install or upgrade your Export Connector for use with Kofax TotalAgility.

Note 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. If you currently have an earlier version of this Export Connector, verify that you have reviewed the [Upgrade process](#) section, and then do one of the following:
 - If you have version 8.0.0 R2 or 8.1.0, go to step 2.
 - If you have version 7.x, you can install version 8.2.0 without removing it. See [Migrate Configuration Settings](#) for instructions on how to retain the current configuration values for use with the new connector.
 - If you have a version earlier than 7.x, make a note of the configuration settings and then [remove](#) the connector, before you go to step 2.
2. In the **Kofax TotalAgility** program folder, select **Kofax Export Connector**.
The Kofax TotalAgility Export Connector Configuration utility appears.
3. On the **Export Connector Configuration** screen, click **Manage**.
4. On the **Export Connectors - Manage** screen, click the **Add** icon to add a new export connector.
The **Export Connectors - Add** window appears.
5. Navigate to your export connector installation files, select **setup.msi**, and click **Open**.
The Export Connector installer appears.
6. Run the installer.
7. Verify that **Kofax Export Connector 8.2.0 for IBM Content Manager** is listed on the **Export Connectors - Manage** screen, and click **Close**.
8. Restart all the Kofax applications and services for Kofax TotalAgility.
9. Configure settings for the Export Connector. See [Set up the export connector](#).

Select the language

To change the language for Kofax Export Connector for IBM Content Manager, 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.

Note If the selected language is not supported for Kofax Export Connector for IBM Content Manager, English is used.

Migrate configuration settings

If you are currently using version 7.x of the Export Connector with Kofax TotalAgility, you can use a migration utility to retain the configuration settings for use with version 8.2.0.

Note The migration utility is not supported for use with Export Connector versions earlier than 7.x, or for use with Kofax Capture or Kofax Express.

1. Verify that you have finished the installation of Kofax Export Connector for IBM Content Manager 8.2.0.
2. In the **Kofax TotalAgility** program folder, select **Kofax Export Connector**.
The Kofax TotalAgility Export Connector Configuration utility appears.

3. On the **Export Connector Configuration** screen, click **Manage**.
4. On the **Export Connectors - Manage** screen, select **Kofax Export Connector 7.x for IBM DB2 Content Manager**.
5. On the toolbar, click the **Export** button.
The settings are exported to an XML file. Make a note of the path to the file.
6. Open an elevated Command Prompt with Administrator privileges and run the migration utility:
`ExportSettingsMigration.exe /inputXML:<Full file path to the XML file> /
outputXML:<Full file path to the output XML file>`
 - where <Full file path to the XML file> is the path to the XML file created in the preceding step
 - where <Full file path to the output XML file> specifies the path where an output XML file will be saved after the utility is run
7. On the **Export Connectors - Manage** screen, select **Kofax Export Connector 8.2.0 for IBM Content Manager**.
8. On the toolbar, click the **Import** button.
9. Navigate to and select the outputXML file created when you ran the migration utility.
10. On the **Export Connectors - Manage** screen, click **Close**.
11. When you open the setup window for version 8.2.0 of the Export Connector, the screens are populated with the values imported from version 7.x.
12. After the values are migrated, manually remove the version 7.x Export Connector from each document type to ensure that documents are exported only to the new version.

Chapter 2

Set up the export connector

This chapter gives you instructions for accessing the export connector setup window for [Kofax Capture](#), [Kofax TotalAgility](#), or [Kofax Express](#).

To export to IBM Content Manager, the logged-in user must have the following:

- Valid IBM Content Manager user name and password
- Permissions to create and modify folders
- Permissions to connect to the IBM Content Manager repository

Contact your IBM Content Manager administrator for assistance.

Use Kofax Capture to set up the Export Connector

Once you have associated a document class with a batch class in Kofax Capture, set up the Export Connector for exporting your images, Kofax PDF documents, eDocuments, and index data.

1. Install the Export Connector according to the instructions in [Install export connector with Kofax Capture or Kofax Express](#).
2. Start the Kofax Capture Administration module.
3. On the **Definitions** panel, click the **Batch** tab.
4. Select a batch class and expand it to view the associated document classes.
5. Right-click the applicable document class to open a context menu, and click **Export Connectors**. The **Export Connectors** window appears.
6. On the **Available Export Connectors** list, select **Kofax Export Connector 8.2.0 for IBM Content Manager** and click **Add**.
The **Kofax Export Connector 8.2.0 for IBM Content Manager - Login Form** window appears.
7. Enter your IBM Content Manager user name and password. The password is case-sensitive.
8. Enter the domain, which is the IBM Content Manager library name.
The login information is used to log in to the IBM Content Manager repository. This information is saved and used during export.
9. To prompt for a user ID and password if the export connector is not able to log in to IBM Content Manager at export time, select the **If unable to log in during export, prompt for valid login information** check box.
 - If selected, and a problem with logging in to the Export Connector occurs, the IBM Content Manager Login Information window appears during export. The user may then enter a valid user

name and password, and click **OK**. However, if the user clicks Cancel, the export process fails. With Kofax Capture, the batch is routed to the Quality Control module.

- If not selected, and problems occur when logging in to the Export Connector, the IBM Content Manager **Login Information** window does not display during export and the export process fails. With Kofax Capture, the batch is routed to the Quality Control module.

Note Do not select this check box if you plan to run Export as a service, or if you plan to run the Export process during off-hours. The **Login Information** window requires a user response (or operator intervention).

10. Click **OK**.
The export connector setup window appears. See [Setup options](#).
11. On the setup window, configure the settings on each tab. Click **Help** on any tab for details about individual settings.
12. When you finish with the setup window, click **OK**.

Use Kofax TotalAgility to set up the Export Connector

1. Verify that the export connector is installed according to the instructions in [#unique_13](#).
2. On the **Export Connector Configuration** screen, click **Setup**.
3. On the **Export Connectors - Setup** screen, select the process to use for exporting document types to IBM Content Manager.
4. Select a document type to associate with the selected process, and click **Add**.
5. Click **Connectors**.
The **Export Connectors - <Document Type> screen** appears.
6. On the **Available Export Connectors** list, select **Kofax Export Connector 8.2.0 for IBM Content Manager** and click **Add**.
Your selection is moved to the **Assigned Export Connectors** list, and the **Export Connector Setup** window appears.
The **Kofax Export Connector 8.2.0 for IBM Content Manager - Login Form** window appears.
7. Enter your IBM Content Manager user name and password. The password is case-sensitive.
8. Enter the domain, which is the IBM Content Manager library name.
The login information is used to log in to the IBM Content Manager repository. This information is saved and used during export.
9. On the [setup window](#), configure the settings on each tab. Click **Help** on any tab for details about individual settings.
10. When you finish with the setup window, click **OK**.
Information messages display a list of changes to the settings and custom properties.
11. Click **OK** to clear the information messages.

Use Kofax Express to set up the Export Connector

1. Verify that the Export Connector is installed according to the instructions in [Install export connector with Kofax Capture or Kofax Express](#).
 2. Start Kofax Express.
 3. On the **Job Setup** tab, in the **Export** group, in the **Connector** list, select **Kofax Export Connector 8.2.0 for IBM Content Manager**.
 4. Click the setup tool.
The **Kofax Export Connector 8.2.0 for IBM Content Manager - Login Form** window appears.
 5. Enter your IBM Content Manager user name and password. The password is case-sensitive.
 6. Enter the domain, which is the IBM Content Manager library name.
The login information is used to log in to the IBM Content Manager repository. This information is saved and used during export.
 7. To prompt for a user ID and password if the Export Connector is not able to log in to IBM Content Manager at export time, select the **If unable to log in during export, prompt for valid login information** check box.
 - If selected, and a problem with logging in to the Export Connector occurs, the Kofax Export Connector for IBM Content Manager **Login Information** window appears during export. The user may then enter a valid user name and password, and click **OK**. However, if the user clicks **Cancel**, the export process is not completed.
 - If not selected, and problems occur when logging in to the Export Connector, the Kofax Export Connector for IBM Content Manager **Login Information** window does not display during export and the export process is not completed. If you are running export as a service, this option is preferred.
- Note** Do not select this check box if you plan to run Export as a service, or if you plan to run the Export process during off-hours. The Login Information window requires a user response (or operator intervention).
8. Click **OK**.
The Export Connector setup window appears. See [Setup options](#).
 9. On the setup window, configure the settings on each tab. Click **Help** on any tab for details about individual settings.
 10. When you finish with the setup window, click **OK**.

Setup options

Use the export connector setup window to specify how documents, folders, and other information are exported to the IBM Content Manager repository. This table summarizes the available setup options. Details about individual settings are available from the online help.

Location	Description
Folder Settings tab	<p>Specifies new or existing folders used to store documents in the IBM Content Manager system. You can specify a Content Manager item type to use for assigning Content Manager attribute values to folders in the folder hierarchy.</p> <p>You can also specify which attributes to use as search attributes when searching for pre-existing folders in Content Manager, or optionally assign a dynamic item type to each folder.</p>
Document Settings tab	Lists IBM Content Manager item types for the documents to export. You can optionally assign a dynamic item type to each document.
Document Routing tab	<p>Gives options to route exported documents or route the parent folder for the current folder to IBM Content Manager processes.</p> <p>You can define static or dynamic processes and assign priorities to them.</p>
Image Settings tab	Specifies the format for exported images.
General Settings tab	<p>Specifies an export working folder as the temporary storage location to use at export time, whether to skip the first page of each document, and other preferences.</p> <p>You can also specify whether to include OCR full text files with exported documents.</p>

Chapter 3

Remove the Export Connector

Use the following procedures to remove the Export Connector from [Kofax Capture](#), [Kofax Express](#), or [Kofax TotalAgility](#) and then from your computer. You can also [repair](#) the Export Connector if necessary.

Remove the Export Connector from Kofax Capture

Use the following procedures to remove the Export Connector from Kofax Capture and from your computer.

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, do one of the following:
 - For Kofax Capture 10.0 or higher: On the **Tools** tab, in the **System** group, click **Export Connectors**.
 - For Kofax Capture 9: On the **Tools** menu, select **Export Connector Manager**.
2. In 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 **Export Connectors - <Document Type>** 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 Express](#), and [Kofax TotalAgility](#), 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 **Application Maintenance** window appears.
2. Select **Remove**, and then click **Next**.
3. Follow the on-screen instructions to remove the Export Connector.
When the removal is complete, a message appears to indicate the Export Connector was successfully removed.

Repair the Export Connector

You can use the repair process to replace missing, renamed, or deleted export connector files.

1. Run the .msi file that you used to install the Export Connector.
When the existing installation is detected, the **Application Maintenance** window appears.
2. Select **Repair**, and then click **Next**.
3. Follow the on-screen instructions to repair the Export Connector.
When complete, a message appears to indicate the Export Connector was successfully repaired.