Ascent Capture® Release Scripts for ApplicationXtender®
5.40

Integration Guide
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This document provides instructions on how to batch scan and index documents in Ascent Capture and then, using a release script, successfully release those documents into the ApplicationXtender® (AppXtender) software.

As part of an effort to improve and enhance the performance and capabilities of its product lines, EMC periodically releases revisions of its hardware and software. Therefore, some functions described in this document may not be supported by all versions of the software or hardware currently in use. For the most up-to-date information on product features, refer to your product release notes.

If a product does not function properly or does not function as described in this document, please contact your EMC representative.

**Audience**

The information in this document is intended for system administrators who are responsible for installing software and maintaining the servers and clients on a network. Operators who monitor the daily backups may also find this manual useful.
After releasing documents to AppXtender, refer to the ApplicationXtender Document Manager User’s Guide and the program’s Online Help for detailed instructions on how to configure, administer, and use AppXtender Document Manager.

Post-release information is contained in the Release Notes for this product. This document is available at http://Powerlink.EMC.com. Refer to the web site periodically to view the latest Release Notes.

The Ascent Capture Release Scripts for ApplicationXtender are part of the ApplicationXtender Content Management suite. Related documents include:

- ApplicationXtender Desktop Installation Guide
- ApplicationXtender Core Components Administrator’s Guide
- ApplicationXtender Administrator’s Quick Reference
- ApplicationXtender Document Manager User’s Guide
- ApplicationXtender Document Manager User’s Quick Reference
- ApplicationXtender Technical Notes

Most of these documents can be found in the Documentation directory on the AppXtender media kit. All documents are in Adobe Acrobat Portable Document Format (PDF), and can be viewed by downloading and installing the Adobe Acrobat Reader. The Reader is available from Adobe at www.adobe.com. To install and use the Reader on the preferred platform, refer to the instructions on the Adobe web site.
Conventions used in this document

EMC uses the following conventions for special notices.

**Note:** A note presents information that is important, but not hazard-related.

**CAUTION**
A caution contains information essential to avoid data loss or damage to the system or equipment. The caution may apply to hardware or software.

**IMPORTANT**
An important notice contains information essential to operation of the software. The important notice applies only to software.

**Typographical conventions**
EMC uses the following type style conventions in this document:

- **Normal**: Used in running (nonprocedural) text for:
  - Names of interface elements (such as names of windows, dialog boxes, buttons, fields, and menus)
  - Names of resources, attributes, pools, Boolean expressions, buttons, DQL statements, keywords, clauses, environment variables, filenames, functions, utilities
  - URLs, pathnames, filenames, directory names, computer names, links, groups, service keys, file systems, notifications

- **Bold**: Used in running (nonprocedural) text for:
  - Names of commands, daemons, options, programs, processes, services, applications, utilities, kernels, notifications, system call, man pages
  - Used in procedures for:
    - Names of interface elements (such as names of windows, dialog boxes, buttons, fields, and menus)
    - What user specifically selects, clicks, presses, or types

- **Italic**: Used in all text (including procedures) for:
  - Full titles of publications referenced in text
  - Emphasis (for example a new term)
  - Variables

- **Courier**: Used for:
  - System output, such as an error message or script
  - URLs, complete paths, filenames, prompts, and syntax when shown outside of running text.
**Preface**

**Courier bold:** Used for:
- Specific user input (such as commands)

**Courier italic:** Used in procedures for:
- Variables on command line
- User input variables

< > Angle brackets enclose parameter or variable values supplied by the user

[ ] Square brackets enclose optional values

| Vertical bar indicates alternate selections - the bar means “or”

{} Braces indicate content that you must specify (that is, x or y or z)

... Ellipses indicate nonessential information omitted from the example

**Where to get help**

EMC support, product, and licensing information can be obtained as follows.

**Product information** — For documentation, release notes, software updates, or for information about EMC products, licensing, and service, go to the EMC Powerlink website (registration required) at:

http://Powerlink.EMC.com

**Technical support** — For technical support, go to EMC Customer Service on Powerlink. To open a service request through Powerlink, you must have a valid support agreement. Please contact your EMC sales representative for details about obtaining a valid support agreement or to answer any questions about your account.
This chapter introduces you to the Ascent Capture® Release Scripts for ApplicationXtender (Ascent for AppXtender). It contains the following sections:

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- Feature Comparison ............................................................................. 12
- Overview of Integrating AppXtender and Ascent Capture .......... 14
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Introduction to Ascent for AppXtender

Ascent Capture is a high-volume batch scanning and indexing software that can be integrated with ApplicationXtender (AppXtender) to provide enhanced scanning capabilities. Documents can be scanned and indexed in Ascent Capture, and then the documents and their attached indexes can be released into an AppXtender application.

Documentum supplies two customized release scripts for AppXtender, one standard and one enhanced, written in Visual Basic. Each of these release scripts reads the Ascent Capture batch database, sends the document indexing information to the AppXtender database, and sends the files to the AppXtender storage subsystem. If the files have not been indexed, they are sent to the AppXtender batch index queue. The batch index queue allows you to scan documents and pages and release them directly to AppXtender.

The following table indicates the full and abbreviated names for each release script, as well as the availability of each:

<table>
<thead>
<tr>
<th>Edition</th>
<th>Full Name</th>
<th>Abbreviated Name</th>
<th>Availability</th>
</tr>
</thead>
<tbody>
<tr>
<td>Standard</td>
<td>Ascent Capture Standard Release Script for ApplicationXtender</td>
<td>Ascent Standard for AppXtender</td>
<td>Purchased and installed with AppXtender</td>
</tr>
<tr>
<td>Enhanced</td>
<td>Ascent Capture Enhanced Release Script for ApplicationXtender</td>
<td>Ascent Enhanced for AppXtender</td>
<td>Purchased and installed separately</td>
</tr>
</tbody>
</table>

The release number of the release script matches the corresponding release number of AppXtender. When referring to both of these release scripts, this guide uses the term "Ascent Capture Release Scripts for ApplicationXtender" to distinguish them from the release scripts provided by Ascent.
For more information, see the following sections:

- “Feature Comparison” lists the features available with Ascent Capture.
- “Overview of Integrating AppXtender and Ascent Capture” provides an overview for this guide, summarizing the steps that you need to take to batch scan and index documents in Ascent Capture and then successfully release those documents into AppXtender.
- “Ascent Capture Modules” discusses the modules of Ascent Capture.
Ascent Capture includes features that help to make your scanning process more efficient. The following features are included:

- A full range of image cleanup features that allow you to increase image readability, improve OCR accuracy, and reduce compressed file size.
- An image quality control module that lets you integrate image quality inspection into the scanning and indexing process.
- Built-in OCR capabilities that allow you to mark and copy text within an image for use in indexing.
- Built-in Visual Basic script and macro creation module that allows you to create customized index data validation scripts.
- The ability to interpret bar codes so that you can separate scan jobs with bar-coded separator pages and use bar code information when indexing documents.
- The ability to move batches easily back into the scan queue if documents need to be re-scanned.
- The ability to release data to multiple applications simultaneously.
- Indexing features similar to features in AppXtender:
  - Rule-based index validation for all indexes.
  - Dual data entry on specified indexes.
- Support for JPEG encoded TIFF format and multi-page TIFF format.
- The ability to specify Batch Name and Batch Memo in the Batch Queue.
- The ability to merge multiple scanned-in pages into a single document.
- The ability to bring electronic files and corresponding index values into AppXtender.

The function of the release scripts in Ascent for AppXtender is to provide the ability to create or modify document indexes prior to release of data into AppXtender. The indexing feature in Ascent Standard for AppXtender and Ascent Enhanced for AppXtender allow you to retain many of the data validation capabilities of...
AppXtender while using a scan and index program geared toward high volume scanning.

Ascent Enhanced for AppXtender provides these additional features:

- The ability to automatically create Ascent Capture batch classes.
- Several indexing features similar to features in AppXtender:
  - Auto indexing to automatically populate a document’s index.
  - Selection of previously entered index values.
  - Duplication of previously entered index values.
  - Ability to obtain index values from the Key Reference table.
Overview of Integrating AppXtender and Ascent Capture

There are two separate approaches to integrate AppXtender with Ascent Capture: one for Ascent Standard for AppXtender and one for Ascent Enhanced for AppXtender.

- "Integrating AppXtender with Ascent Capture Using Ascent Standard for AppXtender"
- "Integrating AppXtender with Ascent Capture Using Ascent Enhanced for AppXtender"

Integrating AppXtender with AscentCapture Using Ascent Standard for AppXtender

Ascent Standard for AppXtender is included with AppXtender, so no separate installation is required. This section summarizes the steps that you need to take to integrate AppXtender with Ascent Capture using Ascent Standard for AppXtender. After integration, you can then batch scan and index documents in Ascent Capture and release those documents into AppXtender.

To integrate Ascent Capture with AppXtender:

1. Prepare for the integration. This includes the creation of the AppXtender application that will hold the images that you want to release from Ascent Capture. "Preparing for the Integration" describes the necessary preparation in detail.

2. Add the standard release script to Ascent Capture. "Adding the Standard Release Script for AppXtender to Ascent Capture Administrator" describes in detail how to perform this procedure.

3. Create an index, a document class, a form type, and a batch class in Ascent Capture. With the standard release script, you must create these items manually. For more information, see "Configuring Ascent Standard for AppXtender."

4. Configure one of the AppXtender release scripts for the document class. These release scripts differ substantially from the standard release scripts that are described in the Ascent Capture documentation. For detailed instructions on configuring the release scripts for AppXtender, see "Configuring the Release Script for the Document Class."
5. Publish your batch class. For detailed instructions on publishing a batch class, refer to the documentation provided with Ascent Capture.

Note: Whenever you make changes to the release scripts for a batch class, you should republish the batch class.

6. Create and run a batch. For information that you must consider for AppXtender while you are creating and running a batch, see “Additional Configuration Information.” For detailed instructions on creating and running a batch, refer to the documentation provided with Ascent Capture.

Integrating AppXtender with Ascent Capture Using Ascent Enhanced for AppXtender

To integrate AppXtender with Ascent Capture using Ascent Enhanced for AppXtender, you must install Ascent Enhanced for AppXtender, since it is not included with AppXtender. Refer to the chapter “Installing and Configuring Ascent Enhanced for AppXtender” for details.

To configure Ascent Enhanced for AppXtender, you can either do it manually by following the procedure outlined for Ascent Standard for AppXtender (see the chapter “Configuring Ascent Standard for AppXtender”), or use the automated procedure described in the chapter “Installing and Configuring Ascent Enhanced for AppXtender.”
Ascent Capture Modules

Ascent Capture includes the following modules:

- Administration
- Batch Manager
- OCR Full Text
- PDF Generator
- Quality Control
- Recognition Server
- Release
- Scan
- Validation
- Verification

Note: In previous releases, the Validation module was called Index and the Verification module was called Index Verification.

Each Ascent Capture module, with the exception of Administration and Batch Manager, corresponds to a processing queue. A queue is a processing step for a batch of documents. As your batches flow through Ascent Capture, they are routed from queue to queue. When you create a batch class, you select the queues that you want to use to process a batch and you determine the order in which that processing occurs.

The Release queue copies images to permanent storage and writes index field data to a database. The manner and location of the release depends on the release script you select. The release scripts for AppXtender read the Ascent for AppXtender batch database and send the document indexing information and files to the AppXtender database and storage subsystem. This guide describes how to configure, select, and use the release scripts for AppXtender.

Ascent for AppXtender uses the Administration, Batch Manager, PDF Generator, Release, Scan, and Validation modules of Ascent Capture. The PDF Generator, Release, Scan, and Validation modules are configured from the Administration module, not the Ascent Capture Start menu.
Where To Go From Here

If you are integrating AppXtender with Ascent Capture using Ascent Standard for AppXtender, follow the instructions in these chapters:

◆ “Configuring Ascent Standard for AppXtender”
◆ “Completing the Configuration and Running a Batch”

If you are integrating AppXtender with Ascent Capture using Ascent Enhanced for AppXtender, follow the instructions in these chapters:

◆ “Installing and Configuring Ascent Enhanced for AppXtender”
◆ “Completing the Configuration and Running a Batch”
This chapter explains how to configure Ascent Capture Standard Release Script for ApplicationXtender (Ascent Standard for AppXtender).

Before you can run batches and release documents to ApplicationXtender (AppXtender), you must create index field types, a document class, and a batch class. With Ascent Standard for AppXtender, you must create these items manually. This chapter describes everything that you must consider for release to AppXtender while you manually create these items.

- Preparing for the Integration ................................................................. 20
- Adding the Standard Release Script for AppXtender to Ascent Capture Administrator 21
- Overview of Configuring Ascent Standard for AppXtender ...... 22
- Creating Index Field Types ................................................................. 23
- Creating a Document Class and Adding Fields .............................. 28
- Defining the Form Type ................................................................. 34
- Creating a Batch Class and Selecting Queues .............................. 36
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Preparing for the Integration

Because Ascent Standard for AppXtender is automatically installed with AppXtender Desktop, no separate installation is required. To prepare for the integration, refer to the following sections:

- “Preparing AppXtender”
- “Adding the Standard Release Script for AppXtender to Ascent Capture Administrator”

Preparing AppXtender

To prepare AppXtender for the integration:

1. Install AppXtender Desktop as described in the ApplicationXtender Desktop Installation Guide. During the installation, select either a Scanning workstation or a Custom workstation. If you select a Custom workstation, make sure that you include the Kofax scanner support files.

2. If you are using a volume label for the document write path, make sure that a volume label search drive is specified in the Paths tab of the AppXtender Document Manager Configuration dialog box. For more detailed information, refer to the ApplicationXtender Desktop Installation Guide.

3. Create an application (unless one already exists) to hold the image documents that you want to release from Ascent Capture. For more detailed information, refer to the "Creating an Application" chapter of the ApplicationXtender Core Components Administrator’s Guide.

   Note: If you want to map multiple Ascent Capture fields to individual AppXtender fields, enable the Multiple indexes referencing single document option for the AppXtender application.

4. If you want documents from Ascent Capture to be automatically submitted to the AppXtender Index Server for full-text indexing, use the AppXtender Index Server Configuration dialog box to create a full-text indexing queue.
Adding the Standard Release Script for AppXtender to Ascent Capture Administrator

This section describes how to add the standard release script for Ascent Standard for AppXtender to the Ascent Capture Administrator. Adding the release script registers it with Ascent Capture.

To add the release script:

1. From the Start menu, select Programs > Ascent Capture > Administration. The Administration module opens.
2. From the Tools menu, select Release Script Manager. The Release Script Manager dialog box appears.
3. Click Add. The Open dialog box appears.
4. Navigate to the AppXtender installation directory (which is C:\Program Files\XtenderSolutions\Content Management by default). For Ascent Standard for AppXtender, select the INF file axdbrelease.inf.

   **Note:** You can add both Ascent Standard for AppXtender and Ascent Enhanced for AppXtender. To add the enhanced script, select the INF file axrelex.inf.

5. Click Open. The Add Release Scripts dialog box appears.
6. Select the Ascent Standard for AppXtender and click Install. A message appears, indicating that the release script has been registered.
7. Click OK. In the Release Scripts dialog box, click Close. In the Release Script Manager dialog box, the Ascent Standard for AppXtender release script is listed.
8. If the new release script does not appear in the list after you have added it, click Refresh.
9. Click Close.
Overview of Configuring Ascent Standard for AppXtender

To configure Ascent Standard for AppXtender for release to AppXtender:

1. Create an index field type in Ascent Capture to correspond with each index field in the AppXtender application. “Creating Index Field Types” describes everything that you must consider while you are creating index field types. For detailed instructions on creating Ascent Capture index field types, refer to the documentation provided with Ascent Capture.

   Note: Index field attributes are enabled differently in Ascent Capture than they are in AppXtender. Some attributes are configured during index field type setup (see step 1), while others such as dual data entry are configured when you add the field types to the document class (see step 2).

2. Create a document class, add a field matching one of the types you created, and create a form type. See “Defining the Form Type.” A document class performs essentially the same function in Ascent Capture that an application performs in AppXtender. The section “Creating a Document Class and Adding Fields” describes everything that you must consider for AppXtender while you are creating a document class and adding the field types to it. For detailed instructions on creating a document class and adding the field types to it, refer to the documentation provided with Ascent Capture.

3. Create a batch class, select document class queues, and insert your document class into your batch class. “Creating a Batch Class and Selecting Queues” describes everything that you must consider for AppXtender while you are selecting document class queues. For detailed instructions on creating a batch class, selecting queues, or adding a document class, refer to the documentation provided with Ascent Capture.

4. Publish a batch class. “Publishing a Batch Class” describes this process.
Creating Index Field Types

To create a new field type:

1. Open Ascent Capture Administration.
2. Click the Field Types tab. A blank pane opens.
3. Right-click anywhere in the blank area.

4. From the shortcut menu, select New Field Type. The Create Field Type dialog box appears.

Figure 1: Ascent Capture Administration - Field Types Tab

Figure 2: Create Field Type Dialog Box
5. Use this dialog box to create a new index field type. Refer to the documentation provided with Ascent Capture for detailed information on creating field types.

While you are creating each index field type, make sure that it matches existing AppXtender index fields in your AppXtender application. The following sections describe important information about matching Ascent Capture field types to AppXtender field types. For detailed instructions on creating field types in Ascent Capture, refer to the *Ascent Capture Getting Started Guide* and *Ascent Capture Advanced Features Guide*.

- “Matching Ascent Capture Data Types to AppXtender Data Types”
- “Indicating the Location of the Decimal Point”
- “Performing Data Validation”

### Matching Ascent Capture Data Types to AppXtender Data Types

AppXtender supports four of the Ascent Capture data types: CHAR, DECIMAL, INTEGER, and VARCHAR.

**CAUTION**

The default data types available in Ascent Capture do not provide the detailed level of data validation inherent in AppXtender data types. Keep the following facts in mind:

- When index information is released into an AppXtender index field that has a data type such as Date, Decimal/Numeric, SSN, or Telephone, the data may not pass AppXtender’s index validation test and the release may fail.

- When index information is released into an AppXtender index field that has a data type such as User-defined List or Boolean Choice, release scripts for AppXtender will validate these fields, and if not valid the release will fail.

- Ascent Capture does not have an equivalent for the AppXtender Part of Unique Key field flag. When index information is released into an AppXtender index field that has a Part of Unique Key field flag, AppXtender does not check the information against the AppXtender database for uniqueness.
For further information about avoiding these problems, see “Performing Data Validation.”

The following table shows how Ascent Capture data types correspond to AppXtender data types:

<table>
<thead>
<tr>
<th>AppXtender Index Field Format</th>
<th>Ascent Capture Index Field Type</th>
<th>Ascent Capture Field Length</th>
</tr>
</thead>
<tbody>
<tr>
<td>Text</td>
<td>CHAR or VARCHAR</td>
<td>same as AppXtender field length, maximum 254</td>
</tr>
<tr>
<td>Integer</td>
<td>INTEGER</td>
<td>maximum digits = 10</td>
</tr>
<tr>
<td></td>
<td></td>
<td>(The range of values that a user may enter is</td>
</tr>
<tr>
<td></td>
<td></td>
<td>from -2,147,483,648 to 2,147,483,647)</td>
</tr>
<tr>
<td>Decimal / Numeric</td>
<td>DECIMAL</td>
<td>maximum numeric digits = 15</td>
</tr>
<tr>
<td></td>
<td></td>
<td>maximum decimal places = 15</td>
</tr>
<tr>
<td>Date</td>
<td>CHAR or VARCHAR</td>
<td>Maximum length = 13</td>
</tr>
<tr>
<td>Time</td>
<td>CHAR or VARCHAR</td>
<td>9</td>
</tr>
<tr>
<td>Time Stamp</td>
<td>CHAR or VARCHAR</td>
<td>20</td>
</tr>
<tr>
<td>SSN (AppXtender Field Sub Format: NNN-NN-NNNN)</td>
<td>CHAR or VARCHAR</td>
<td>11</td>
</tr>
<tr>
<td>SSN (AppXtender Field Sub Format: NNNNNNNNNNN)</td>
<td>CHAR or VARCHAR</td>
<td>9</td>
</tr>
<tr>
<td>Telephone</td>
<td>CHAR or VARCHAR</td>
<td>14 (maximum), based on longest telephone number</td>
</tr>
<tr>
<td></td>
<td></td>
<td>format</td>
</tr>
<tr>
<td>Zip Code (AppXtender Field Sub Format: NNNNN)</td>
<td>INTEGER</td>
<td>10</td>
</tr>
<tr>
<td>Zip Code (AppXtender Field Sub Format: NNNNN-NNNN)</td>
<td>CHAR or VARCHAR</td>
<td>10</td>
</tr>
<tr>
<td>Currency</td>
<td>DECIMAL</td>
<td>Maximum numeric digits = 15</td>
</tr>
<tr>
<td></td>
<td></td>
<td>maximum decimal places = 2</td>
</tr>
<tr>
<td>Boolean Choice</td>
<td>CHAR or VARCHAR</td>
<td>10 (maximum), based on longest item in the</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Boolean choice list</td>
</tr>
<tr>
<td>User-defined List</td>
<td>CHAR or VARCHAR</td>
<td>length of longest item in the user defined list, up to 254</td>
</tr>
</tbody>
</table>
**Indicating the Location of the Decimal Point**

When creating an index field type to match a field that has a data type of decimal/numeric or currency in AppXtender, use an Ascent Capture data type of DECIMAL. Make sure that the Numeric digits value reflects the number of digits before *and after* the decimal point and that the Decimal places value reflects the number of digits after the decimal point.

To create a Decimal Data Type field:

1. On the General Tab, select "Decimal" from the Data Type dropdown list.
2. Adjust the Numeric Digits and Decimal Places as desired.
3. Enter a field name in the Name field.
4. Save your settings.

   An example is shown in the following figure:

![Create Field Type Dialog Box with DECIMAL Data Type](image)
Performing Data Validation

If you know the Visual Basic programming language, you can use the Validation module of Ascent Capture to perform data validation in the following ways:

- You can create field validation scripts with SoftBridge Basic.
- You can create field validation macros.

For information on creating field validation scripts or macros, refer to the documentation provided with Ascent Capture. In the absence of data validation scripts or macros, however, you can take two precautions to prevent mistakes:

- Give the user who will be responsible for data entry a standards sheet describing exactly what formats and types of characters are acceptable for each index field.
- Use the index verification feature to ensure accurate data entry.
Creating a Document Class and Adding Fields

To create a document class:

1. Open Ascent Capture Administration.
2. Click the Document tab. The Document tab opens to a blank pane.
3. Right-click anywhere in the blank area.
4. From the shortcut menu, select New Document Class. The Create Document Class Dialog box appears.

Figure 4  Ascent Capture Administration - Document Tab
Creating a Document Class and Adding Fields

5. Use this dialog box to create a document class and add fields to it. To create a field:
   - Click New.
   - Select a field type.
   - Enter a name for the field.

The settings in the document class must match the settings in the existing AppXtender application. The following sections describe important information about matching the Ascent Capture document class to the existing AppXtender application.

   - “Relationship of the Ascent Capture Document Class Name to the AppXtender Application Name”
   - “Relationship of the Ascent Capture Field Names to AppXtender Field Names”
   - “Defining Fields in a Document Class”

For detailed instructions on creating a document class and adding field types to it, refer to the Ascent Capture Getting Started Guide and Ascent Capture Advanced Features Guide.
Configuring Ascent Standard for AppXtender

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**Relationship of the Ascent Capture Document Class Name to the AppXtender Application Name**

The document class name in Ascent Capture does not have to match the application name in AppXtender.

---

**Relationship of the Ascent Capture Field Names to AppXtender Field Names**

The index field names in Ascent Capture do not have to match the index field names in AppXtender. However, if you use matching names, Ascent Capture will automatically link fields when you set up your document class.

---

**Defining Fields in a Document Class**

Depending on the type of field you are defining and the AppXtender field characteristics you want to match, you may need to take the following steps:

- To set the maximum length for any field based on the CHAR data type, enter a value in the text box under Default, in the row for that field.

- To set a field as required (for index fields that are flagged as required in AppXtender) click under Required in the row for that field. From the drop-down list, select True.

- To configure a field for dual data entry (which means that the user indexing documents enters index data twice for that field), click under Verify in the row for that field. From the drop-down list, select True. If you set Verify to True for an index field, you must also include the Verification module on the Queues tab for the batch class. For more information, see “Creating a Batch Class and Selecting Queues.”

- To configure a field when using multiple indexes for a single document in AppXtender, you must first create a table to hold the multiple values and then specify the fields within the table, as follows:
  - Add a new field and set the Field Type to "(TABLE)" from the drop-down list box. This is now the table that will hold the values for fields with multiple index values. This field will not display as an index field when indexing documents.
• Another field will automatically be created and displayed as indented under the table field just created. This is an index field for entering multiple values. Set the field name to the desired name and enter any other desired settings.

• More index fields can be created within the table as desired in the same manner, as shown in the following figure. Any fields created within the table field will display as index fields and can contain multiple values.

![Document Class Dialog Box with TABLE Field Type and Associated Index Fields for Multiple Values](image)

Figure 6 Document Class Dialog Box with TABLE Field Type and Associated Index Fields for Multiple Values
About Linking Multiple Fields

If you link multiple Ascent Capture fields to individual AppXtender fields (to create multiple indexes for a document), there are some considerations to keep in mind.

For example, consider an AppXtender application with three index fields: Name, Check Number, and Invoice Number. The following table indicates that three Ascent Capture values are linked to the Check Number field and two values are linked to the Invoice Number field:

<table>
<thead>
<tr>
<th>AppXtender Field</th>
<th>AppXtender Field Flag</th>
<th>Ascent Capture Fields</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>Required</td>
<td>Name</td>
</tr>
<tr>
<td>Check Number</td>
<td></td>
<td>Check1;Check2;Check3</td>
</tr>
<tr>
<td>Invoice Number</td>
<td></td>
<td>Invoice1;Invoice2</td>
</tr>
</tbody>
</table>

In this example, at index time, the following values were entered.

<table>
<thead>
<tr>
<th>Ascent Capture Field</th>
<th>Ascent Capture Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>Fred</td>
</tr>
<tr>
<td>Check1</td>
<td>1001</td>
</tr>
<tr>
<td>Check2</td>
<td>1002</td>
</tr>
<tr>
<td>Check3</td>
<td>1003</td>
</tr>
<tr>
<td>Invoice1</td>
<td>11111</td>
</tr>
<tr>
<td>Invoice2</td>
<td>22222</td>
</tr>
</tbody>
</table>
The result of the release would be a single AppXtender document with the following three index records.

<table>
<thead>
<tr>
<th>Name</th>
<th>Check Number</th>
<th>Invoice Number</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fred</td>
<td>1001</td>
<td>11111</td>
</tr>
<tr>
<td>Fred</td>
<td>1002</td>
<td>22222</td>
</tr>
<tr>
<td>Fred</td>
<td>1003</td>
<td></td>
</tr>
</tbody>
</table>

Notice that the value Fred was duplicated for all of the index records, because it had only one value.

Also notice that the third index has an empty value for Invoice Number, because it was not flagged as Required and had only two values. If this field had been flagged as Required in AppXtender, the release would have failed for this index record.

Each index record went through the validation process.
Defining the Form Type

After you have completed creating fields and a document class in the Ascent Capture Administration module, you then define form types. A form type is the container for a document class. Form types are attached to the document class and are used by Ascent Capture.

To create a form type:

1. Right-click the document class. A menu appears, as shown below.

   ![Ascent Capture Administration Menu - New Form Type Option](image)

2. Select New Form Type. The Create Form Type dialog box appears.
3. As a minimum, enter a name for the form type.
4. Click OK.
Creating a Batch Class and Selecting Queues

To create a batch class:
1. Open Ascent Capture Administration.
2. Click the Batch tab. The Batch tab opens to a blank pane.
3. Right-click anywhere in the blank area.

4. From the shortcut menu, select New Batch Class. The Create Batch Class dialog box appears.
5. Enter at least a name for the batch class and click OK. The Ascent Capture - Administration window shows the batch class you created.

Figure 9    Ascent Capture Administration - Batch Tab
Creating a Batch Class and Selecting Queues

6. Right-click the batch class and select Insert Document Class. Select the document class that corresponds with the AppXtender application and click OK.

While or after you create a batch class, you need to select queues. The selected queues for a batch class determine the flow of batch processing in Ascent Capture. The Queues tab of the Create Batch Class dialog box or the Batch Class Properties dialog box allows you to select document class queues.
Ascent Capture automatically arranges the order of the queues listed in the Selected Queues list. Once you start the batch for the document class, Ascent Capture will require you to complete each of the configured actions before moving on to the next.

**Note:** The Release queue is required so that Ascent Capture can release items to AppXtender.

To perform dual data entry for any index fields:

Add the Verification queue after the Validation queue.

To perform OCR and full-text indexing on the documents within Ascent Capture:

Add the OCR Full Text queue.

**Note:** If you process a multi-page document in the OCR Full Text queue in Ascent Capture and then release the document to AppXtender, the text output of all of the pages is stored as separate pages after the original pages. For example, if you process a three-page document in the OCR Full Text queue in Ascent Capture and then release the document to AppXtender, the AppXtender document will have six pages. Pages 1-3 will be the originals and pages 4-6 will be the OCR text output.

**Note:** If you are releasing documents to the AppXtender batch index queue, you do not need to add the Validation module to the Selected Queues list on the Queues tab for the batch class. If you do include the Validation module and attempt to release indexed documents to the AppXtender batch index queue, the indexes will be removed from the documents upon release to AppXtender.

To configure Ascent Capture for PDF file generation:

Add the PDF generator queue. See example shown below:
For detailed instructions on selecting document class queues, refer to the documentation provided with Ascent Capture.

After you have created the batch class, associated it with a document class, and selected queues for the batch class, you need to configure the release script. For instructions, see “Configuring the Release Script for the Document Class.”
Publishing a Batch Class

After you have configured the batch class and the release script, you can publish the batch class.

To publish a batch class:

1. Open Ascent Capture Administration.
2. Click the Batch tab. The Batch tab displays the batch class that you created.
3. Right-click the batch class to display the shortcut menu.
4. Select Publish.

5. The Batch Class Publish dialog box appears, showing the batch classes that have been created. In the sample screen below, Bat1 is the only batch class that has been created.
6. Click Publish. The results of the publishing process display in the Results pane.

7. If the batch class was published successfully, click Close.

See the documentation provided by Ascent Capture for detailed information on publishing the batch class.

Now that you have completed the steps for configuring Ascent Standard for AppXtender, you can complete the configuration and run a batch. Refer to the chapter “Completing the Configuration and Running a Batch” for information.

You also have the option of configuring Ascent Enhanced for AppXtender for PDF generation. For instructions, refer to the section “Configuring the Release Script for PDF Generation.”
Configuring Ascent Standard for AppXtender
This chapter contains the information you need to install and configure Ascent Capture Enhanced Release Script for ApplicationXtender (Ascent Enhanced for AppXtender). It contains the following sections:

- Preparing for the Integration ......................................................... 44
- Installing the Enhanced Release Script ........................................ 46
- Adding the Enhanced Release Script for AppXtender to Ascent Capture Administrator 48
- Using the Ascent Batch Class Creation Utility .............................. 49
- Defining the Form Type ................................................................. 54
- Publishing a Batch Class ............................................................... 56
- Implementing the eDocument Feature in Ascent Enhanced for AppXtender 58
Preparing for the Integration

To prepare Ascent Enhanced for AppXtender for the integration, refer to the following sections:

- “Preparing Ascent Enhanced for AppXtender”
- “Preparing AppXtender”

Preparing Ascent Enhanced for AppXtender

To prepare Ascent Enhanced for AppXtender for the integration, purchase and install a copy of the Ascent Capture software. Contact your Kofax sales representative for details on acquiring Ascent Capture.

**Note:** If you need to upgrade Ascent Capture, do not uninstall the older version. Instead, just install the newer version.

Preparing AppXtender

To prepare AppXtender for the integration:

1. Install AppXtender as described in the *ApplicationXtender Desktop Installation Guide*. During the installation, select either a Scanning workstation or a Custom workstation. If you select a Custom workstation, make sure that you include the Kofax scanner support files.

2. If you are using a volume label for the document write path, make sure that a volume label search drive is specified in the Paths tab of the AppXtender Document Manager Configuration dialog box. For more detailed information, refer to the *ApplicationXtender Desktop Installation Guide*.

3. Create an application (unless one already exists) to hold the image documents that you want to release from Ascent Capture. For more detailed information, refer to the “Creating an Application” chapter of the *ApplicationXtender Core Components Administrator’s Guide*. 
Installing and Configuring Ascent Enhanced for AppXtender

Note: If you want to map multiple Ascent Capture fields to individual AppXtender fields, enable the Multiple indexes referencing single document option for the AppXtender application.

4. If you want documents from Ascent Capture to be automatically submitted to the AppXtender Index Server for full-text indexing, use the AppXtender Index Server Configuration dialog box to create a full-text indexing queue.
Installing the Enhanced Release Script

An installation wizard allows you to install the Ascent Enhanced for AppXtender software.

To install Ascent Enhanced for AppXtender:

1. Close all open applications.
2. Insert the AppXtender Desktop/Web setup CD-ROM into your CD-ROM drive.
3. From the Windows Start menu, select Run. The Windows Run dialog box appears. In the Open text box, enter
   D:\ApplicationXtender\Release Scripts\Ascent Capture Advanced Script\ACSetup.msi where D represents the drive that contains the setup CD-ROM. Click OK. The Ascent Enhanced Script for AppXtender Setup wizard appears, starting with the Welcome page.
4. Click Next. The License Agreement page appears.

Figure 15  Ascent Enhanced for AppXtender Setup, License Agreement Page
5. After reading the License Agreement, you have the following choices:
   - Enable the I accept the license agreement option. The Next button becomes available.
   - Enable the I do not accept the license agreement option. If you do not accept the terms of the License Agreement, you must click Cancel to terminate the installation.

6. Click Next. The Ready to Install the Application page appears.

7. Click Next. The Updating System page appears, indicating the progress of the installation. Files are installed to the AppXtender installation directory, which is C:\Program Files\XtenderSolutions\Content Management by default. A subdirectory Xslt is also created.

8. The next page of the wizard indicates a successful installation.

9. Click Finish.
Adding the Enhanced Release Script for AppXtender to Ascent Capture Administrator

This section describes how to add the enhanced release script for AppXtender to the Release Script Manager in the Ascent Capture Administrator. Adding the release script registers it with Ascent Capture.

To add the release script:

1. From the Start menu, select Programs > Ascent Capture > Administration. The Administration module opens.
2. From the Tools menu, select Release Script Manager. The Release Script Manager dialog box appears.
3. Click Add. The Open dialog box appears.
4. Navigate to the AppXtender installation directory (which is C:\Program Files\XtenderSolutions\Content Management by default). Select axrelex.inf.

   **Note:** You can add both Ascent Enhanced for AppXtender and Ascent Standard for AppXtender. To add the standard script, select the INF file axdbrelease.inf.

5. Click Open. The Add Release Scripts dialog box appears.
6. Select Ascent Enhanced for AppXtender and click Install. A message appears, indicating that the release script has been registered.
7. Click OK. In the Release Scripts dialog box, click Close. In the Release Script Manager dialog box, the release script for AppXtender is listed.
8. If the new release script does not appear in the list after you have added it, click Refresh.
9. Click Close.
Using the Ascent Batch Class Creation Utility

Before you can run batches and release documents to AppXtender, you must create index field types, a document class, and a batch class. If you have Ascent Enhanced for AppXtender, you can create these items automatically based on an existing AppXtender application. This section describes how to use the Ascent Batch Class Creation utility to create these items automatically.

Note: With Ascent Enhanced for AppXtender, you also have the option of creating these items manually. For information, see “Configuring Ascent Standard for AppXtender.”

The Ascent Batch Class Creation utility allows you to automatically create a batch class. The Batch Class Creation utility checks the AppXtender application, index fields, and data types it is configured to use and exports this information to a cab file. Importing this cab file into Ascent Capture creates a batch class, document class, and corresponding field types.

To use the Ascent Batch Creation Utility:

1. Run the SetBatchCls.exe file (located in the XSLT subdirectory of the AppXtender installation directory, which is C:\Program Files\XtenderSolutions\Content Management by default). The Login dialog box appears.

2. From the Data Sources list, select the data source that contains the application for which you want to generate Ascent Capture batch class, document class, and corresponding field types.
3. In the User Name text box, type the user name for a user that can access the selected data source and that has the Administrator privilege.

4. In the Password text box, type the password for the user name you entered.

5. Click the Login button.

**Note:** If a message appears indicating a problem connecting to the License Server, make sure that a license has been added to the License Server for the Ascent Capture Enhanced Release Script for ApplicationXtender.

The Ascent Batch Class Creation dialog box appears.
6. From the Applications list, select the AppXtender application that you want to use and click Create Batch Class. The Save As dialog box appears.

7. Name a new cab file or select an existing cab file, and click Save. The batch class is saved.

8. Import the cab file in Ascent Capture.

Figure 17  Ascent Batch Class Creation Dialog Box

Figure 18  Save As Dialog Box
a. Open the Ascent Capture Administration module.

b. Select File -> Import.

c. Select the cab file you want to import. The Import/Export screen appears, showing the progress of the import.

d. Click OK. The Import dialog box appears.

e. From the Import dialog box, select the batch class, click Add to add it to the Selected Batch Classes pane, then click Import.

f. The Import/Export screen appears again, showing the import process completing successfully.
For more information on how to import files into Ascent Capture, refer to the Ascent Capture Getting Started Guide.

After you run the Ascent Batch Class Creation Utility, you still need to do the following manually:

- Define the form type. See “Defining the Form Type” for information.
- Configure the release script. For instructions, see “Configuring the Release Script for the Document Class.”
- Publish the batch class. See “Publishing a Batch Class.”
- If using multiple index values to reference a single document, you will need to add a table field to the Document Class fields and specify the index fields within the table field that will contain multiple index values. This is explained in more detail in “Defining Fields in a Document Class.”

You also have the option of configuring the eDocument file extension mappings and configuring the release script for PDF generation. For instructions, refer to the sections “Implementing the eDocument Feature in Ascent Enhanced for AppXtender” and “Configuring the Release Script for PDF Generation.”

- To complete the configuration and run the batch, refer to the chapter “Completing the Configuration and Running a Batch.”
Defining the Form Type

Defining the form type is one of the manual procedures you have to complete after you run the Ascent Batch Class Creation Utility. A form type is the container for a document class. Form types are attached to the document class and are used by Ascent Capture.

To create a form type:

1. Right-click the document class. A menu appears, as shown below.

![Ascent Capture Administration Menu - New Form Type Option](image)

2. Select New Form Type. The Create Form Type dialog box appears.
3. Enter at least a name for the form type.
4. Click OK.

After you have used the Ascent Batch Class Creation Utility and created a form type, you need to configure the release script. For instructions, see “Configuring the Release Script for the Document Class.”
Installing and Configuring Ascent Enhanced for AppXtender

Publishing a Batch Class

After you have configured the batch class and the release script, you can publish the batch class.

To publish a batch class:
1. Open Ascent Capture Administration.
2. Click the Batch tab. The Batch tab displays the batch class that you created.
3. Right-click the batch class to display the shortcut menu.
4. Select Publish.

Figure 24  Ascent Capture Administration - Batch Tab

5. The Batch Class Publish dialog box appears, showing the batch classes that have been created. In the sample screen below, Bat1 is the only batch class that has been created.
6. Click Publish. The results of the publishing process display in the Results pane.

7. If the batch class was published successfully, click Close.

See the documentation provided by Ascent Capture for detailed information on publishing the batch class.

After you create the form type and publish the batch class, you have the option of configuring the release script for the eDocument feature and PDF generation. Refer to the sections “Implementing the eDocument Feature in Ascent Enhanced for AppXtender” and “Configuring the Release Script for PDF Generation” for instructions. If you do not want to configure these optional features, go to the section “Completing the Configuration and Running a Batch.”
Implementing the eDocument Feature in Ascent Enhanced for AppXtender

Ascent Standard for AppXtender does not accept PDF files. With the standard script, a PDF file in Ascent Capture that is released to AppXtender will be treated as a foreign file.

The eDocument feature in Ascent Enhanced for AppXtender accepts PDF files. With the eDocument feature, a PDF file scanned (or imported) into Ascent Capture can be released to AppXtender as a PDF file. The fields in the eDocument File Extension Mapping section of the Settings tab on the AppXtender Release Setup dialog box show the three file extensions supported by the eDocument feature.

![AppXtender Release Setup Dialog box - Settings Tab](image)

To enable the eDocument feature in Ascent Capture:

1. Open the Batch Class Properties dialog box
2. Click the Advanced tab.
3. Under Import Options, click the Allow import of eDocument files check box.
Note: Any documents with extensions not listed in the eDocument File Extension Mapping section in the Settings tab of the AppXtender Release Setup dialog box will be saved as foreign files in AppXtender. For more information on these options, refer to the Ascent Capture documentation. For more information on AppXtender foreign files, refer to the ApplicationXtender Core Components Administrator’s Guide and ApplicationXtender Document Manager User’s Guide.
Completing the Configuration and Running a Batch

After you have created a batch class, a document class, and field types in Ascent Capture (either manually or automatically), you must complete the configuration of the batch class and document class before you can run batches and release documents to AppXtender. This chapter describes how to complete this configuration, describes the considerations that you must keep in mind when running a batch for release to AppXtender, and summarizes the steps involved in creating and running a batch.

**Note:** Some of the procedures for completing the configuration and running a batch differ between Ascent Standard for AppXtender and Ascent Enhanced for AppXtender. These differences are noted in the instructions.

- Configuring the Release Script for the Document Class ........... 62
- Additional Configuration Information................................. 75
- About Creating and Running a Batch.................................. 81
- Indexing a Batch in Ascent Capture.................................... 82
Completing the Configuration and Running a Batch

Configuring the Release Script for the Document Class

Before you can create and run a batch for release into AppXtender, you must configure one of the AppXtender release scripts (Ascent Standard for AppXtender or Ascent Enhanced for AppXtender) for the document class.

To configure the release script:

1. In the Ascent Capture Administration module, click the Batch tab and expand the node for the batch class you want to use.

2. Right-click the node for the document class you want to use. A shortcut menu appears. From this shortcut menu, select Release Scripts. The Release Scripts dialog box appears.

3. Select Ascent Standard for AppXtender or Ascent Enhanced for AppXtender (from the Available Release Scripts list) and click Add.

   Note: If you want to edit a release script that has already been added, select it from Assigned Release Script list and click Setup.

   If an error message appears, make sure that a data source is set as default in the AppXtender Data Source Selector. For instructions, refer to the ApplicationXtender Document Manager User’s Guide.

   The AppXtender Release Setup dialog box appears.
4. Configure each of the tabs on this dialog box with your AppXtender application in mind. The following sections describe the special AppXtender considerations for each of these tabs:

- “Selecting the Data Source”
- “Specifying Login Information”
- “Selecting the AppXtender Application”
- “Linking the Fields”
- “Configuring the Release Settings”

When all tabs of the AppXtender Release Setup dialog box have been configured, click OK. The document class has been configured for release. After you publish the batch class, it will be released into AppXtender when you run a batch for that document class.
Completing the Configuration and Running a Batch

Selecting the Data Source

This tab allows you to select the AppXtender data source where the AppXtender application receiving the release is located.

Figure 29  AppXtender Release Setup Dialog Box - Data Source Selection

To configure the Data Source Selection tab:

1. Under Data Source Name, select the name of the data source that you want to use.
2. Click Select Data Source.
3. Click Apply.

Note: This tab corresponds to the AppXtender Data Source Selector dialog box.
Completing the Configuration and Running a Batch

Specifying Login Information

After you have selected an AppXtender data source, the Login Information tab allows you to specify the AppXtender user name that you want Ascent Capture to use for AppXtender access.

The user you specify must have the following privileges for the application in the ApplicationXtender Application Generator (AppXtender AppGen) module:

- Configure WS
- Display
- Add Page

The tab also allows you to release information from Ascent Capture into an ApplicationXtender Workflow (AppXtender Workflow) database.

To configure the Login Information tab:

1. Under ApplicationXtender Login, in the User Name and Password text boxes, type an AppXtender user name and password.
Completing the Configuration and Running a Batch

2. Under AppXtender Workflow Login, you have three choices:
   - If you do not want to release information from Ascent Capture into an AppXtender Workflow database, select None.
   - If you want to release information from Ascent Capture into an AppXtender Workflow database, and you want Ascent Capture to use the same user name and password for both AppXtender access and AppXtender Workflow access, select Unified with AppXtender. Then type an AppXtender Workflow database name and AppXtender Workflow Server name in the appropriate text boxes.
   - If you want to release information from Ascent Capture into an AppXtender Workflow database, and you want to use a different user name or password for AppXtender Workflow than you are using for AppXtender, select Separate from AppXtender. Then type a user name, password, AppXtender Workflow database name, and AppXtender Workflow Server name in the appropriate text boxes.

3. Click Apply.
Selecting the AppXtender Application

After you have selected an AppXtender data source and specified login information, the Application or Select Application tab allows you to select the AppXtender application to which you want Ascent Capture to release documents and indexes or batch index queues.

![AppXtender Release Setup Dialog Box - Application Tab for Ascent Standard for AppXtender](image)

**Figure 31** AppXtender Release Setup Dialog Box - Application Tab for Ascent Standard for AppXtender
To configure the Application tab or Select Application tab:

1. From the first drop-down list, select an application.
2. You can perform one of the following:
   
   - If you want to release to the AppXtender database, select Release to AppXtender database.
   - If you want to release to an AppXtender batch without index information, select Release to AppXtender Batch Index.
3. If you selected Release to AppXtender database, you can configure how Ascent handles release of documents that have the same index values as existing AppXtender documents:

- If want the released pages to become separate documents, clear the Merge data with existing documents check box.
- If want to append the released pages to the existing documents, enable the Merge data with existing documents check box.

*Note:* This option is available only with the Ascent Enhanced for AppXtender.

4. If you want documents from Ascent Capture to be automatically submitted to the AppXtender Index Server for full-text indexing, from the second drop-down list, select a full-text indexing queue.

5. Click Apply.

**Linking the Fields**

After you have selected an AppXtender data source, specified login information, and selected an AppXtender application, the Field Links tab allows you to link AppXtender fields to Ascent Capture fields. If a permission error appears when you attempt to select this tab, make sure that the user specified on the Login tab has Configure WS, Display, and Add Page privileges. For information, see “Specifying Login Information.”

To successfully transfer index data from Ascent Capture to AppXtender, you must link each Ascent Capture field to an AppXtender field. If the Ascent Capture index field types match the AppXtender index fields, these fields are automatically linked.
Completing the Configuration and Running a Batch

![AppXtender Release Setup Dialog Box - Field Links Tab](image)

**Figure 33** AppXtender Release Setup Dialog Box - Field Links Tab

Note: When you run the Ascent Batch Class Creation Utility and produce the .cab file, some fields do not get populated. If a field is not populated, you will need to manually link it.

To configure the Field Links tab:

1. Select an AppXtender Field name and click Create Link. The Select Ascent Field dialog box appears.

![Select Ascent Field Dialog Box](image)

**Figure 34** Select Ascent Field Dialog Box
2. In the Index list box, select the Ascent Capture field name (or names) that you want to link with the selected AppXtender field name.

3. If you want to specify a text constant for the selected field, from the Ascent Capture Values drop-down list, select a value that matches the AppXtender field type. Then, in the Text Constant text box, type a value. This value will override any value you type for the selected field in Ascent Capture's Validation module.

4. Click Select.

5. Repeat steps 1-4 for each remaining AppXtender field in the Field Links tab. Click Apply.

**Configuring the Release Settings**

After you have selected an AppXtender data source, specified login information, selected an AppXtender application, and linked fields, the Settings tab allows you to configure miscellaneous release settings.

![AppXtender Release Setup Dialog Box - Settings Tab for Ascent Standard for AppXtender](image)

**Figure 35** AppXtender Release Setup Dialog Box - Settings Tab for Ascent Standard for AppXtender
Completing the Configuration and Running a Batch

Figure 36  AppXtender Release Setup Dialog Box - Settings Tab for Ascent Enhanced for AppXtender

If a permission error appears when you attempt to select this tab, make sure that the user specified on the Login tab has Configure WS, Display, and Add Page privileges. For information, see “Specifying Login Information.”

To configure the Settings tab:

1. If necessary, change the path in the Temporary Release Directory text box. When documents are released from Ascent Capture into AppXtender, the images are moved first into a temporary directory, the directory specified by the Temporary Release Directory text box. If the release is successful, the images are moved to the AppXtender document storage location and deleted from the temporary directory.

   Note: If a release fails, the images remain in the temporary directory. If you need to save space, consider deleting files periodically from this temporary directory.

2. Determine how you want images to be stored in AppXtender by selecting a type from the Image File Release Type list and by enabling or disabling the Pass images through AppXtender Viewer option.
The following table indicates the type of image stored in AppXtender depending on the settings you choose and whether the image is in color or black and white.

### Table 6  Image File Release Type

<table>
<thead>
<tr>
<th>Image File Release Type</th>
<th>Color</th>
<th>Pass Images Through AppXtender Viewer?</th>
<th>Type of Stored Image in AppXtender</th>
</tr>
</thead>
<tbody>
<tr>
<td>JPG – JPEG Compression</td>
<td>Color</td>
<td>No</td>
<td>JPG – JPEG Compression</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Yes</td>
<td>JPG – JPEG Compression</td>
</tr>
<tr>
<td>Black and White</td>
<td>No</td>
<td>JPG – JPEG Compression</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Yes</td>
<td>TIFF – CCITT Group 4</td>
</tr>
<tr>
<td>Multipage TIFF – CCITT Group 4</td>
<td>Black and White</td>
<td>No</td>
<td>TIFF – CCITT Group 4</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Yes</td>
<td>TIFF – CCITT Group 4</td>
</tr>
<tr>
<td>Multipage TIFF – JPEG Compression</td>
<td>Black and White</td>
<td>No</td>
<td>TIFF – JPEG Compression</td>
</tr>
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<td></td>
<td></td>
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<td>TIFF – JPEG Compression</td>
</tr>
<tr>
<td>Multipage TIFF - Uncompressed</td>
<td>Black and White</td>
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<td>TIFF - Uncompressed</td>
</tr>
<tr>
<td></td>
<td></td>
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<td>TIFF - Uncompressed</td>
</tr>
<tr>
<td>TIFF – CCITT Group 4</td>
<td>Black and White</td>
<td>No</td>
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<tr>
<td></td>
<td></td>
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<td>TIFF – CCITT Group 4</td>
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<tr>
<td>TIFF – JPEG Compression</td>
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<td></td>
<td></td>
<td>Yes</td>
<td>JPEG Compression</td>
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<tr>
<td>TIFF – Uncompressed</td>
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<td>TIFF – Uncompressed</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Yes</td>
<td>TIFF – Uncompressed</td>
</tr>
<tr>
<td>Black and White</td>
<td>No</td>
<td>TIFF – Uncompressed</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Yes</td>
<td>TIFF – CCITT Group 4</td>
</tr>
</tbody>
</table>

3. If necessary, enable the Skip First Page option. If you use this option, the first page of each document is not released to AppXtender with the rest of the pages. For example, if you have a three-page document in Ascent Capture and release it to
Completing the Configuration and Running a Batch

AppXtender with this option enabled, only pages 2 and 3 are stored in AppXtender. This option is useful if the first page of each document in Ascent Capture is a placeholder or if the first page is a bar code separator sheet.

4. Click Apply. When all tabs of the AppXtender Release Setup dialog box have been configured, click OK.

After you have configured the release script, you can publish the batch class. For instructions, see “Publishing a Batch Class.”
Additional Configuration Information

The following sections describe considerations that relate to the use of Ascent Capture with AppXtender:

- To configure the release script for PDF file generation, see “Configuring the Release Script for PDF Generation.”
- After you have created a batch, but before you index it, make sure that end of batch behavior is configured properly. At the end of the batch, keep the batch open. For information, see “Configuring End of Batch Behavior.”
- After you run a batch, if the release has failed, you may need to re-index the batch in Ascent Capture. For information, see “Re-indexing a Batch in Ascent Capture.”

Note: If a permission error appears when you attempt to release documents from Ascent Capture to AppXtender, make sure that the login user specified in the AppXtender Release Setup dialog box has the Add Page privilege. For information, see “Specifying Login Information.”

Configuring the Release Script for PDF Generation

To configure Ascent Capture for PDF file generation:

From the Batch Class Properties dialog box (Administration module), add the PDF generator queue as shown below:
Completing the Configuration and Running a Batch

For detailed instructions on selecting document class queues, refer to the documentation provided with Ascent Capture. Ascent Capture can convert a scanned or imported .TIF file into PDF. You can configure the release script so that the resulting PDF file in Ascent Capture can be released to AppXtender as a PDF file.

To configure Ascent Capture for PDF file generation:

1. Open the Document Class Properties dialog box.
2. Select the PDF tab.
3. Click the Enable Kofax PDF generation check box.

To configure the release script so that a PDF file in Ascent Capture can be released to AppXtender as a PDF file:

1. On the AppXtender Release Setup dialog box, click the Settings tab.
2. In the Image File Release Type field, click the drop-down arrow to the right of the field.
3. Select one of the PDF release types from the list.

You are now ready to complete the configuration and run a batch. Refer to the chapter “Completing the Configuration and Running a Batch” for information.
Completing the Configuration and Running a Batch

Configuring End of Batch Behavior

If errors occur during a release, none of the documents in the batch are released into AppXtender; the entire batch remains in the Ascent Capture database until the release runs successfully. One common cause for these errors is an index validation test failure in AppXtender, because the default data types available in Ascent Capture do not provide the detailed level of data validation inherent in AppXtender data types such as SSN, Telephone, Boolean Choice, and User-defined List. When index information that has one of these more complex data types is released into an AppXtender index field, the data may not pass an index validation test in AppXtender and the release may fail.

In preparation for that possibility, before releasing documents from Ascent Capture into AppXtender, you can configure the Ascent Capture Validation module's end of batch behavior. If there are errors during the release and if the end of batch behavior is not configured correctly, you will not be able to queue the batch for re-indexing and will have to re-scan the batch. If you enable the Prompt before closing batch feature, after you index the last document, a message appears allowing you to close the batch or keep it open.

To configure the Ascent Capture Validation module's end of batch behavior:

1. Start the Ascent Capture Validation module.
2. From the Tools menu, select Options. The Options dialog box appears.
Completing the Configuration and Running a Batch

3. Make sure that the Prompt before closing batch check box is enabled.

4. Click OK.

When you have indexed the last document in the batch, a message appears, giving you a choice between closing the batch or keeping it open. If you keep the batch open and if there are errors during the release, you will be able to queue the batch for re-indexing. For instructions, see “Re-indexing a Batch in Ascent Capture.”

Re-indexing a Batch in Ascent Capture

To re-index the batch in Ascent Capture:

1. Check the index field formats for the AppXtender application in AppGen in preparation for re-indexing the incorrectly indexed documents.

2. Once you have determined what the correct data format is for each field, start the Ascent Capture Batch Manager module.
Completing the Configuration and Running a Batch

3. Select the batch in error from the Batch Details list. Batches in error may easily be located by sorting the list by status. To sort the list by status, click the Status column heading.

4. Select the batch, and from the File menu, select Properties; or, double-click the batch. The Batch Properties dialog box appears.

5. From the Status drop-down list box, select Ready. From the Queue drop-down list box, select Validation.

6. Click OK. Close the Batch Manager.
7. Start the Ascent Capture Validation module. The Open Batch dialog box appears. Select the batch you want to edit and click OK. A message appears asking if you want to close the batch. Click No. Correct any index formatting or data entry errors.

Once the batch has been successfully released, you can retrieve the documents in AppXtender.
About Creating and Running a Batch

To run a scan and index session in Ascent Capture and release the results into AppXtender, you must publish the batch class, create a batch in Ascent Capture based on the document class that you configured for AppXtender, and then process that batch. The batch will be routed through each of the document class queues configured for the document class.

If, for example, you choose Scan, Validation, Verification, and Release as the queues for the class, the batch will be created in the Scan queue. Once all scanning is complete, the batch will be routed to the Validation queue. Verification will then be required before the batch goes into the Release queue. If the batch is released successfully, the documents added in Ascent Capture are stored in AppXtender and can be retrieved with the AppXtender application designated in the AppXtender Release Setup dialog box.

For detailed instructions on creating and running a batch, refer to the documentation provided with Ascent Capture.
Completing the Configuration and Running a Batch

Indexing a Batch in Ascent Capture

The Validation module allows you to create and modify indexes before releasing captured data to AppXtender. If the batch release fails, you may also need to re-index the batch in Ascent Capture. For instructions, see “Re-indexing a Batch in Ascent Capture.” Additional indexing options are described in the following sections:

♦ “Using Multiple Indexes for a Single Document”
♦ “Additional Indexing Features”

Using Multiple Indexes for a Single Document

If the batch document class has been configured for using multiple indexes for a single document, additional index values can be entered by pressing Ctrl+I while indexing a document. In the following figure, the batch document class was configured with two index fields for entering multiple values: CHECK NO. and INVOICE NO. After entering the first set of values, pressing Ctrl+I created a second set of index fields to enter a second set of values for the same document.

![Figure 41 Entering Multiple Indexes for a Single Document](image-url)
Additional Indexing Features

To create or modify indexes in Ascent Enhanced for AppXtender, you may also use the Auto Index, Select Index, Duplicate Index, or Key Reference Lookup features. For more information, see the following sections:

◆ “Using Auto Index to Index Documents”
◆ “Using Select Index to Index Documents”
◆ “Using Duplicate Index to Index Documents”
◆ “Using Key Reference Lookup to Index Documents”

Note: When you start the Validation module, you may need to drag the index fields panel down to reveal the entire index button panel.

CAUTION

The default data types available in Ascent Capture do not provide the detailed level of data validation inherent in AppXtender data types. Keep this in mind when entering values into an Ascent Capture index field that corresponds to an AppXtender field with the following data types and field flags: Boolean Choice data type, Date data type, Decimal/Numeric data type, SSN data type, Telephone data type, User-defined List data type, Dual Data Entry flag, Part of Unique Key flag. For information on avoiding data validation problems, see “Performing Data Validation.”

Using Auto Index to Index Documents

The Auto Index feature allows you to enter data into an index field and match against previously entered records. Ascent Capture populates all other Auto-Index-enabled index fields with data from the record.

Note: This feature is available only with the Ascent Enhanced for AppXtender, and only when the Auto Index flag has been applied to one or more index fields in AppGen.

To auto index a record:

1. Start the Ascent Capture Validation module. The Open Batch dialog box appears. Select the batch you want to edit and click OK.
2. If desired, enter data in one or more of the index fields.
3. Click the Auto Index button.

![Auto Index Button](image)

**Auto Index Button**

Ascent Capture begins a search for Auto Index records that meet specified criteria.

- If only one record matches the criteria, the index fields are automatically populated.
- If more than one record matches the criteria, the AppXtender Result Set dialog box appears.

![AppXtender Result Set Dialog Box](image)

**AppXtender Result Set Dialog Box**
4. If the AppXtender Result Set dialog box appears, you have the following choices:
   - To choose an index record, select the record and then click the Select button. The index information that you selected appears in the index fields.
   - To exit the AppXtender Result Set dialog box, click the Cancel button.
5. If necessary, make changes to the index information.

The Select Index feature allows you to enter data into an index field according to previously entered records.

**Note:** This feature is available only with the Ascent Enhanced for AppXtender.

To use the Select Index feature:

1. Start the Ascent Capture Validation module. The Open Batch dialog box appears. Select the batch you want to edit and click OK.
2. Click the Select Index button.
The Selected Records dialog box appears.

![Selected Records Dialog Box](image)

3. You can perform one of the following:
   - To copy an index, select the record and then click the Copy Index button
   - To exit the Selected Records dialog box, click the Cancel button.

4. If necessary, make changes to the index information.

Using Duplicate Index to Index Documents

The Duplicate Index feature allows you to automatically copy index fields from previously entered records. The Duplicate Index feature is only available per session in Ascent Capture. If you are starting a new session and have not indexed any records, the Duplicate Index button is disabled.

*Note:* This feature is available only with Ascent Enhanced for AppXtender.

To duplicate an index record:

1. Start the Ascent Capture Validation module. The Open Batch dialog box appears. Select the batch you want to edit and click OK.
2. Click the Duplicate Index button.
Completing the Configuration and Running a Batch

Using Key Reference Lookup to Index Documents

The Key Reference Lookup feature allows you to enter data into one primary Key-Reference-enabled index field and populate all other Data-Reference-enabled index fields with the data from the record in the Key Reference table. For example, if the key field is “social security number,” then Ascent Capture could fill in the associated “name” and “birth date” data fields; data entry is required for the key field only. For this reason, Key Reference Lookup can be a useful feature for automatically populating index information that will be used to describe several documents and that may need to be changed frequently.

**Note:** This feature is available only with Ascent Enhanced for AppXtender, and only when the Key Reference flag has been applied to one index field and the Data Reference flag has been applied to one or more other index fields in AppXtender AppGen.

To use key reference lookup:

1. Start the Ascent Capture Validation module. The Open Batch dialog box appears. Select the batch you want to edit and click OK.
Completing the Configuration and Running a Batch

2. Enter a value into a key field of the index.
3. Click the KeyRef Lookup button.

4. If necessary, make changes to the index information.
This glossary contains terms related to ApplicationXtender (AppXtender) components. Many of these terms are used in this manual.

### A

**accessible security**
Accessible security grants access to the users in the group for only documents with index field values matching the secured value list. (See also Document Level Security.)

**annotation**
An annotation is a note or a shape added to a document or batch page, typically to focus attention on a particular part of the page. Users can use annotations to comment on the contents of a page, block areas of the page from view, or highlight important information. When a user creates an annotation, it is associated with the AppXtender page on which he or she created it. Annotations are edited and stored separately from the image, but they are displayed along with the image in ApplicationXtender Document Manager and Web Access. The types of annotations available include text, highlighting, lines, arrows, shapes, and rubber stamps.

**annotation group**
Annotation groups allow you to create associations between users, groups, and specific annotations. You can specify which users and groups can view or modify specific annotations, and which users and groups can hide or modify specific redactions.

**appender**
An appender allows you to select the specific ApplicationXtender Web Access .NET or Rendering Server information you want to log and to publish that information to a specific reporting venue.
<table>
<thead>
<tr>
<th>Term</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>application</strong></td>
<td>An AppXtender application is an index-driven data storage structure where documents can be stored and retrieved. An AppXtender application is based on an index that is composed of one or many fields. AppXtender applications are created in ApplicationXtender Application Generator (AppXtender AppGen).</td>
</tr>
<tr>
<td><strong>application security profile</strong></td>
<td>Application security profiles, like global security profiles, allow you to grant a particular set of privileges to a user or group of users. You can define different privileges for a user or group of users in each application. When a profile is application-specific, however, the privilege settings are not carried over to a new application when it is created. If a group of users has an application-specific profile for a certain application, but no global profile, then when a new application is created, the members of the group will not be able to access the new application. Application-specific security settings override global security settings.</td>
</tr>
<tr>
<td><strong>ApplicationXtender Auto Index Import</strong></td>
<td>AppXtender Auto Index Import allows use of the &lt;F7&gt; key to import index values from a text file, so users adding documents can automatically populate indexes using the imported data. Auto Index is ideal for the import of index records that are applicable to only one document. In an Auto Index Import table, once a record (or a group of index values) has been used to index a document, the record is deleted.</td>
</tr>
<tr>
<td><strong>ApplicationXtender Index Image Import</strong></td>
<td>AppXtender Index Image Import allows you to import index data and document files in a single step. A text file is required which contains a line of text for each document to be imported, with a value for each index field and a reference to the location of the file to be imported. No manual document indexing is required.</td>
</tr>
<tr>
<td><strong>ApplicationXtender Index Server</strong></td>
<td>ApplicationXtender Index Server is an optional module that adds full-text indexing and OCR functionality to AppXtender systems.</td>
</tr>
<tr>
<td><strong>ApplicationXtender Key Reference Import</strong></td>
<td>AppXtender Key Reference Import allows use of the &lt;Tab&gt; key to import index values from a text file. Key Reference is most effectively used in situations where each imported record may describe several documents. Key Reference Import maintains the index records in the Key Reference table even after records have been used to index documents. Any change made to a record in the Key Reference table is reflected in the indexes of all documents described by that record.</td>
</tr>
</tbody>
</table>
audit trail  The Audit Trails feature allows you to track user activity within the AppXtender system. System-wide activities such as the creation, modification, and deletion of applications, users, and groups can be tracked. You can also track user activity in applications by tracking items such as the creation and deletion of documents, the addition of pages, and the modification of index information for documents. By default, AppXtender logs audit trail events to a table in the AppXtender database. You can configure audit trails to log to this table, to a log file, or to both locations.

authentication  Authentication requires all users to enter a valid user name and password to access software modules. Authentication ensures that each user is who he or she claims to be.

authorization  Authorization is the granting of specific access privileges according to the user name. Security profiles contain information pertaining to a user’s specific privileges within the AppXtender system.

collection  A collection is a K2 full-text database.

data source  A data source is the means by which AppXtender accesses data from a database. When a data source is defined, an OLE DB data provider is configured to access the database. All of these characteristics in combination – where the data is stored, the format of the data stored, and the data provider used to access the data – comprise the data source.
data source group  A data source group in ApplicationXtender Administrator (AppXtender Admin) associates a list of data sources with everything that has been configured in AppXtender Admin, such as ApplicationXtender Web Access (AppXtender Web) settings and connections to License Server computers. This feature provides convenience in that the work of configuration does not have to be repeated every time you create a data source.

database  A database is a collection of data tables of a particular database format (such as Oracle or Microsoft SQL Server). AppXtender uses databases to store application information. When an application is created, details such as the field definitions and security information are stored in database tables. Once documents are added to an application, index information is stored in a table, as are the pointers to the location of the documents.

document  A document is a page or group of pages stored in an application and identified by index information. Each page of a document is comprised of a single object such as a scanned image file or a word processing document. To create a new document, users add an object to an application and attach index information to it. Subsequent objects can be added as additional pages of the same document.

Document Level Security  Document Level Security (DLS) pinpoints user access within an AppXtender application. With DLS, you can deny a group of users access to any classified or sensitive document(s), without restricting access to other documents in the application. DLS can also be configured to grant a group of users access to only a specific set of documents in an application.

ERM  ERM (enterprise report management) data is report data generated for existing applications. ERM data can be added to AppXtender as documents through the use of ApplicationXtender Reports Management (AppXtender Reports Mgmt).

extended applications  Extended applications are AppXtender applications that can be called from within other software applications, adding document storage and processing functions.
**F**

**full-text** Users can index documents for full-text searching by submitting them to the AppXtender Index Server. With a full-text search, users can find documents even if they do not know any of the index values. Users can also use full-text searching to refine an index value search.

**G**

**global security profile** Global security profiles can be established to automatically assign a uniform set of access privileges for a user or group of users every time a new application is created. When a global profile exists for a user or group of users, the privileges assigned in that profile are automatically assigned for every application created. If a user or group of users does not have a global profile, an application-specific profile must be created for that user or group before they can access an application.

**grab bar** An AppXtender Document Manager docked view has a grab bar. A grab bar is similar to a title bar except that it does not contain a title.

**I**

**impersonation account** The AppXtender Index Server impersonation account grants security privileges to AppXtender Index Server and is essential for the AppXtender Index Server to operate properly. AppXtender Index Server uses the AppXtender Index Server impersonation account to access remote and server resources, including AppXtender document paths, the License Server, the registry, and the image repository (in some cases, the DiskXtender Document Server).

**import specification** A specification is a set of rules that AppXtender follows when importing data from an import file using the AppXtender Auto Index Import, Index Image Import, or Key Reference Import wizard.

**inaccessible security** Inaccessible security denies access to the users in the group for documents with index field values matching the secured value list. (See also Document Level Security.)

**index** An AppXtender index contains a group of fields where descriptive information pertaining to documents can be stored. This group of field definitions is used by AppXtender when storing index information within an application.
node
A node is an element of a tree structure such as in AppXtender Admin, AppGen, Document Manager, or Reports Mgmt. A node can be expanded to reveal subnodes or can be collapsed.

OCR
Users can process bi-tonal images using optical character recognition (OCR). This process converts an image of text into text. After a user processes an image using OCR, it can then be submitted to the AppXtender Index Server for full-text searching.

ODMA
Open Document Management API (ODMA) support allows users to work with AppXtender documents within other ODMA-compliant applications.

OLE DB
OLE DB is a programming interface for accessing data, and is a fundamental building block for storing and retrieving data using Microsoft’s Data Access Components (MDAC). OLE DB provides flexible data architecture that offers applications like AppXtender efficient access to databases. Data is accessed through OLE DB data providers.

page
The word “Page” typically implies a single entity. Since AppXtender supports multiple object types, the term “page” is redefined within AppXtender to mean a single object. A very long word processing file is considered a page to AppXtender. A page could also be, for example, a single scanned image, a 30-minute video clip, or an audio recording. Each page of a document has the same index record attached.

privileges
Privileges govern the ability of a user or group of users to access functions in AppXtender.

redaction
A redaction is a filled and opaque annotation shape that can be used to secure or hide portions of image and text pages. Users can apply redaction to all available annotations. When applied, the area of the page behind the redaction is not visible.
security

Security is the combination of authentication and authorization.

security mapping

When AppXtender Migration is used to migrate documents and security information, the administrator has the option to map users and groups in the source database to users and groups in the destination database. Similarly, when the ApplicationXtender Media Distribution (AppXtender Distribution) Extraction Wizard is used to extract AppXtender documents and security information before the creation of an AppXtender Distribution CD-ROM, the administrator has the option to map users and groups in the source database to users and groups in the database on the CD-ROM (or in the database where the CD-ROM will be reintegrated).

security provider

Security providers implement authentication, which requires all users to enter a valid user name and password to access most modules. AppXtender Admin offers two pre-packaged security providers (CM and Windows) to ensure that each user is who he or she claims to be. You can also create a directory service security provider, if necessary.

write paths

Write paths are used to instruct AppXtender where to store documents, annotations, OCR output, and the ProIndex full-text database for a particular AppXtender application.
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