CAPSYS|CAPTURE

ExportPRO (QSX) Release Module
Quick Reference Guide

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CAPSYS

EXPORTPRO RELEASE – QUICK REFERENCE GUIDE

INTRODUCTION

The CAPSYS CAPTURE ExportPRO Module is a configurable export module that can be used for releasing data (documents and associated metadata) from CAPSYS CAPTURE to 3rd party systems. This module has a graphical user interface and can easily be tailored to meet client needs. ExportPRO is a QSX (Quick Server Extension) module, which can be configured to:

- Release multi-page TIF images;
- Release index values in a formatted text file;
- Name the exported images using index values;
- Output images to a folder structure created by index values (C:\Index1\Index2\filename. tif).

CONFIGURATION

To begin the configuration of the module you need to start by inserting the SharePoint Release QSX Module into a new or existing Process Map. Once you have finished your configuration(s) complete the remainder of your Process Map and begin your capture processing.

ACCESSING, CONFIGURING AND USING THE QSX

With your *"Batch Profile"* or *"Document Type"* open:

1. Place the *"ExportPro Release QSX"* by clicking on the *"QSX Icon"* and then clicking in the process map.   The QSX Selection Window will open and select *"ExportPro Release"* and then *"OK"* to continue.
2. After you have placed the *"ExportPro Release QSX"* icon on the process map, right-click on the icon and select *"Configure".*
3. Select a "**Release Type"** by pulling down the menu in the "**Release Type"** box.
   NOTE: As of the publish date of this document, the available options are *Standard*, *Kofax-Import,* and *SharePoint*.   Your CAPSYS license file will dictate which release types are available. The process to setup the *Standard* and *Kofax-Import "Release Types"* are similar and use the same screens, the *SharePoint* process has a different screen and separate documentation that can be referred to.

STANDARD OR KOFAX-IMPORT RELEASES

To complete the *"Standard"* and *"Kofax-Import"* Release Types you will be working through and completing information on four (4) tabs.
   NOTE: Some of the fields 1n the tabs you will have an option to use a right click and select from a pick list of *"Batch Profile"* and *"Document Type"* Values. If you choose to use these values, the remainder of the information will need to be manually populated with the path information (ie: C:\CAPSYS\Temp\"Picklist Value").

1. *"Main"* tab will need to have the Output and Image Path, along with any special mapping related to the user and the Add Literal Function completed.

A. **"Output path"** is where the metadata associated with the images will be stored. There are three (3) methods that can be used to populate this field. The first is to type the name of the path. The second is to use the **"Browse"** function, select the **"…"** at the end of the line, locate the folder you would like to use and select "OK" the field will automatically be populated with the selected path. The third is to **"Right Click"** which will open a pick list of the Batch Profiles and Document Types, depending on which method you are using to configure the module, select the index you would like to use from the provided values.

B. **"Image path"** is where the image files will be stored. There are three (3) methods that can be used to populate this field. The first is to type the name of the path. The second is to use the **"Browse"** function, select the **"…"** at the end of the line, locate the folder you would like to use and select "OK" the field will automatically be populated with the selected path. The third is to **"Right Click"** which will open a pick list of the Batch Profiles and Document Types, depending on which method you are using to configure the module, select the index you would like to use from the provided values.

C. **"Map a Drive"** is <u>only</u> used when you need to release to a UNC (Universal Naming Convention) path with a different username and password than the user running the CAPSYS CAPTURE service. This information can only be entered manually, and may be changed at different intervals.

   NOTE: When completing these fields, the associated files will be sent to this location overriding the paths entered in the **"Output"** and "**Image**" Paths.

D. **"Add Literal function"** is used to add a string to the output file.

2. "**Meta-Data File**" tab is where you can control how the metadata files will be named and formatted during the release process.

   A. **"Prefix"** or **"Descriptive File Prefix".** Is the field used to create some type of specialized naming to your files (IE: INV could be used if you were processing invoices). While the **"Prefix"** is an optional field, it is *strongly* recommended that you specify a value in this field for identifying the type of work processed.

   B. The **"Next #"** is the naming or numbering convention used when exporting a text file. This is a sequential naming convention following the "Prefix" (ie: INV001).

   C. **"Type"** or **"File Extension"** is the extension of the output text file and is most commonly a "txt" file.

   D. **"Delimiter"** is used to separate index values inside the output file that is created. The most commonly used Delimiter is a comma (",") or a bar ("|").

   E. **"Fixed Name"** gives you the ability to use index values or timestamps to name the text output. The **"right click"** method can be used in this field. For example, a typical naming convention could be:
   @FIELD=AP DEM0>Invoice Number@TIMESTAMP=yyyyMMddHHmmssff

   F. **"File"** is an option that can be set to replace the path of the image file for inclusion into the Metadata.

   G. **"Filter Fields by Document Type"** check box is used to limit the available Document Type fields to the applicable Document Types for this output file (to narrow the Document Type choices from the aggregate list of all Document Types defined in the system). This would only apply when adding ExportPRO at the Batch level.

3. **"Image File"** tab is used to determine how you want image files to be handled during the release process.

   A. The File Extension does not need to be completed.

B. The Blank Page Size is not used for this step.
C. Custom Image File Name is used to create a unique naming convention for your output file. The *"right click"* method can be used in this field.
D. The *"Multi-Page Image"* checkbox should be checked when you want a multi-page TIF as opposed to a single-page TIF.
E. The *"Custom Image File Field"* is used to name the Image File and must be completed. If you right-click on the field it will provide an option to select the document type fields or the specific system values. To add your own Literal String, type the "@" followed by the string. This would be required for the file extension. For example, a typical naming convention could be:
   @FIELD=AP DEM0>Invoice
   Number@TIMESTAMP=yyyyMMddHHmmssff@. TIF

4. **"Co-Op"** tab is used to configure files created in the CAPSYS CAPTURE OCR Module.
   Note: The Co-Op field, path and other attributes were defined in the CAPSYS CAPTURE OCR Module as detailed below (if using this feature please refer to the setup in this module).
   A. The *"Field"* can be configured so you can use the filename being used in the CAPSYS CAPTURE OCR Module.
   B. The *"File Export to"* is used to detail the pathname of the file along with the file naming convention of that file. The *"right click"* method can be used in this field.
   C. Check the *"Cleanup"* box when a PDF file has been exported, and to remove that PDF file from temporary storage.
   D. Check the *"Stop Processing"* box when all you need to do is export a PDF file, meaning there is no other ExportPro processing to be performed. (ie: no index export, no special processing).

SharePoint Release

Select *"SharePoint"* as the *"Release Type".*
1. Complete the *"Sharepoint Imaging Service URL", "Sharepoint Lists Service URL", "Domain", "Username" and "Password"* Fields and select *"OK"*. If you are not aware of the Sharepoint Web Service information, contact your system administrator. Once this configuration is completed the documents should be released to *"SharePoint"*.