

CAPSYS | CAPTURE

ExportPRO (QX) Release Module Configuration and Administration Guide

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CAPSYS

6755 EARL DRIVE, SUITE 207
COLORADO SPRINGS,
CO 80918

PHONE: (877) 322-7797

FAX: (630) 875-1101

www.capsystech.com



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PROVIDING FEEDBACK ABOUT THIS GUIDE

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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 ExportPRO Module there are three (3) steps involved. In our examples we will be using the **“Batch Profile”** method.

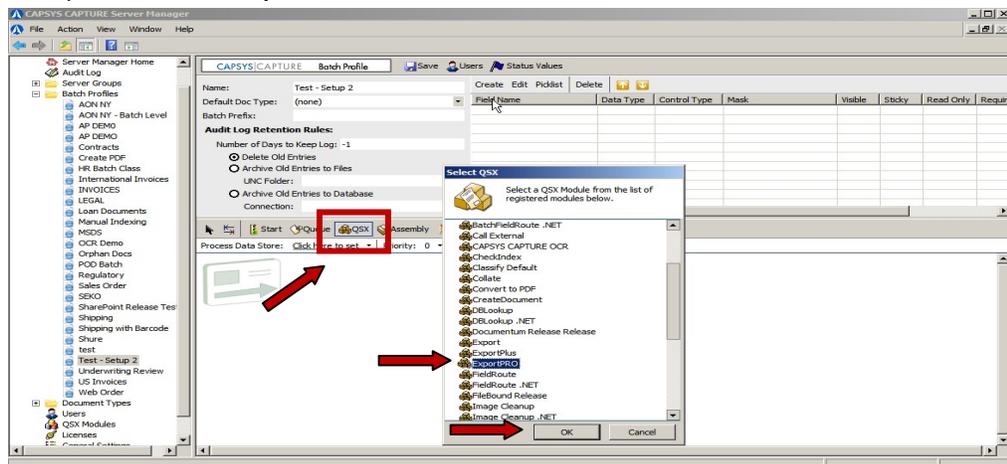
1. The first step is to create a **“Batch Profile”** or **“Document Type”** Process Map where the ExportPRO QSX can be configured, in either case the screens are completed with the same information.
2. The second step is the capture of the license from your server.
3. The third step is the setup/configuration of the module tabs that drive the flow of information that you will be processing.

ACCESSING, CONFIGURING AND USING THE QSX

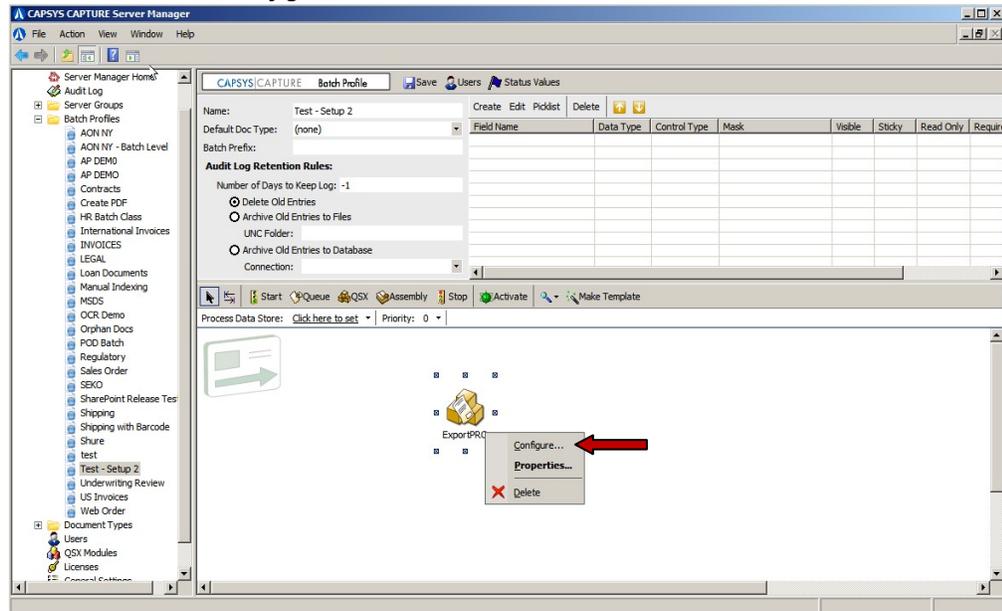
CAPTURE SERVER LICENSE – STEP 1

With your **“Batch Profile”** or **“Document Type”** open, we will move into the process of setting up and capturing your CAPSYS CAPTURE License. This step is only required to be completed once, unless there is a change to your license (In the event of a change in your license, you will be directed by the CAPSYS Support Team to access and update the necessary screens with your new license).

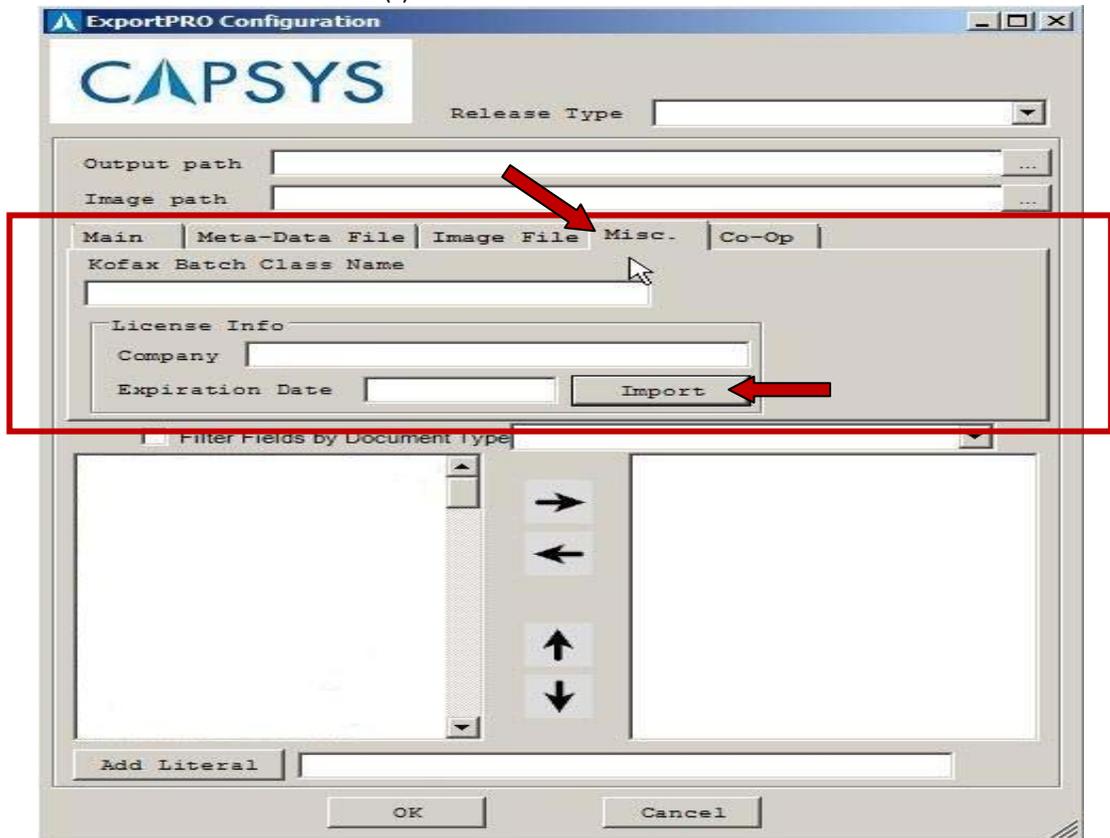
1. Place the **“ExportPro Release QSX”** on the **“Batch Profile”** or **“Document Type”** by clicking on the **“QSX Icon”** and then clicking in the process map. The QSX Selection Window will open and select **“ExportPro Release”** and then **“OK”** to continue.



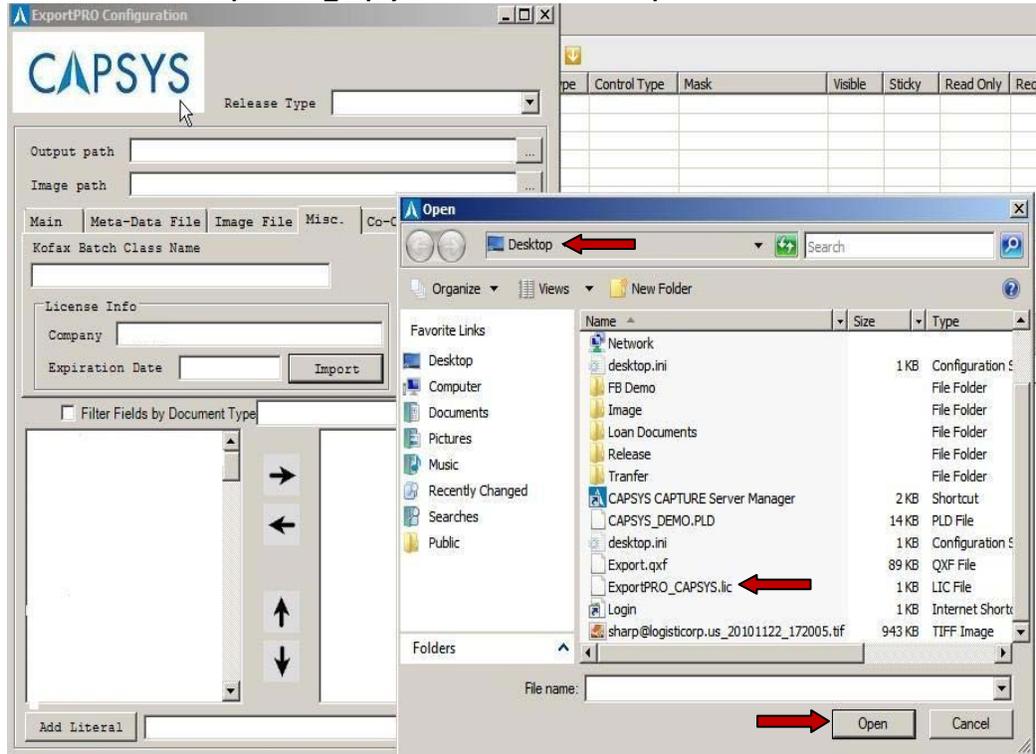
- After you have placed the **“ExportPro Release”** icon on the process map, right click on the icon and select **“Configure”**.



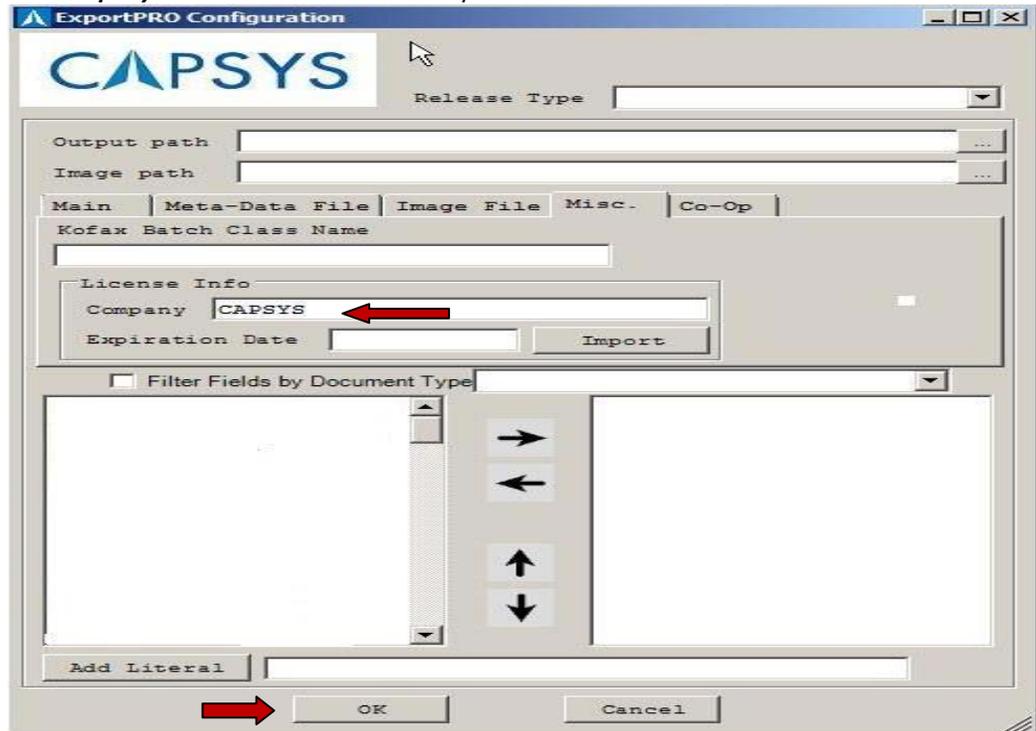
- The following dialog box will appear, select the **“Misc”** tab and then click on the **“Import”** button. The **“Misc”** tab is used for the importing of your license file, which gives access to the licensed release module(s).



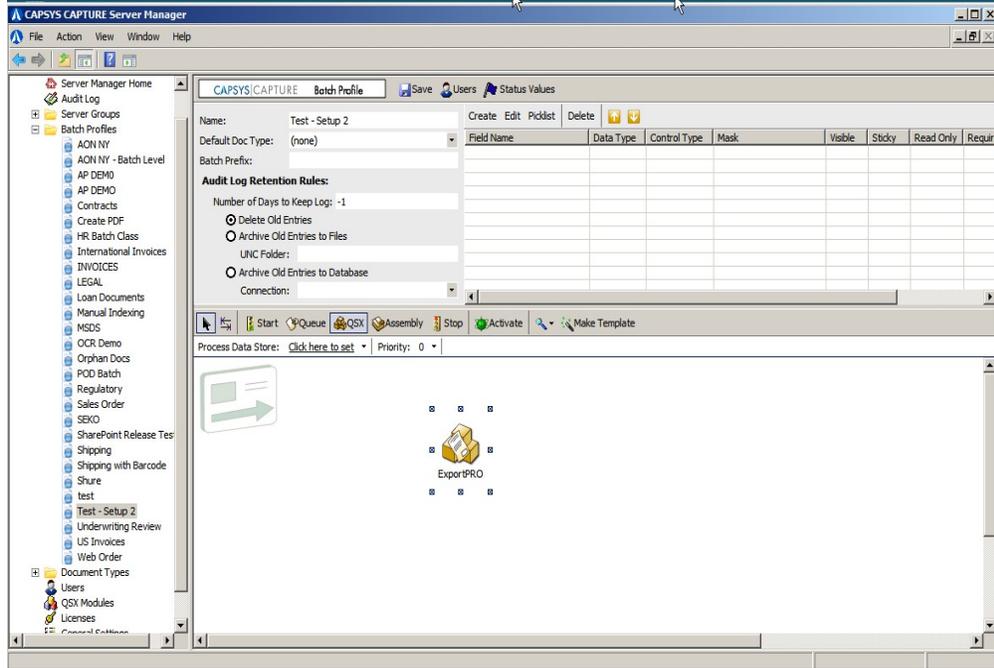
- Browse through the network for the folder containing the licenses (Company Determined) and select the **"ExportPRO_Capsys. lic"** file and select **"Open"**.



- The screen will reappear and the License Information will be populated in the **"Company"** field. Select **"OK"** to save your work.

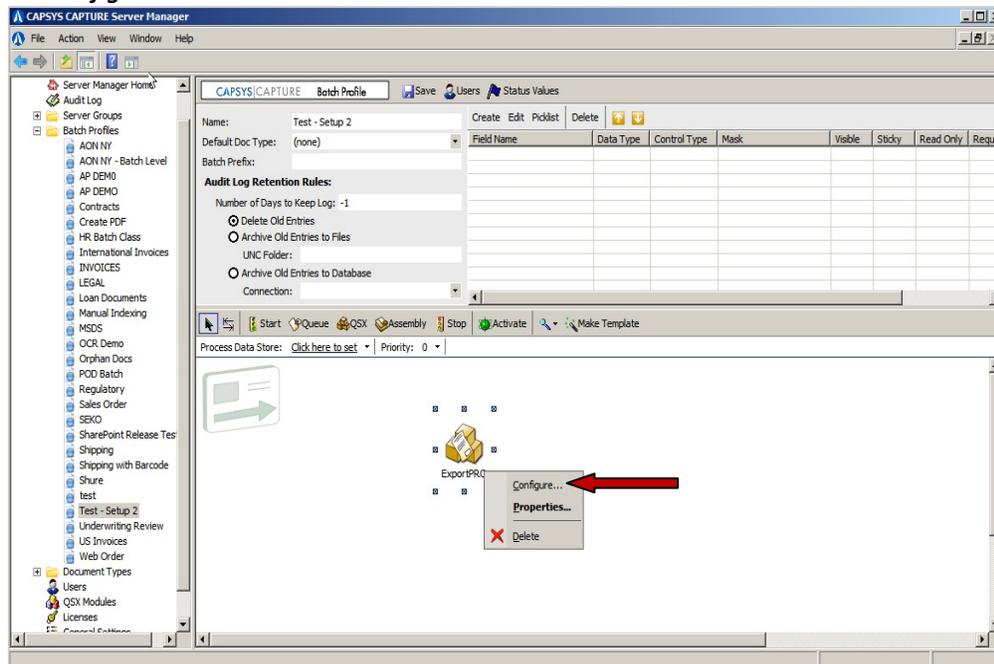


- You are now ready to begin building the remainder of the **“ExportPRO”** Configurations for your workflow.

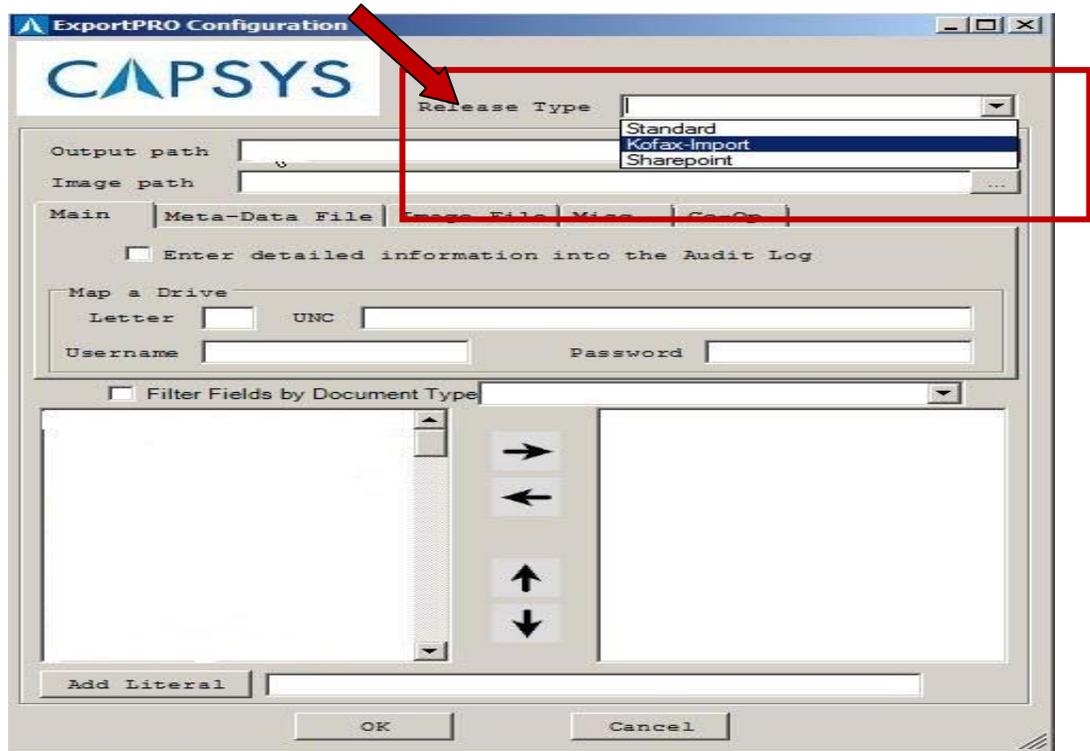


WORKFLOW SETUP – STEP 2

- To begin configuring the workflow for **“ExportPRO”** right click on the icon and select **“Configure”**.



2. 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 to you for configuration. The process to setup the **Standard** and **Kofax-Import** “**Release Types**” are similar and use the same screens, the **SharePoint** process has a different set of screens and separate documentation that can be referred to.

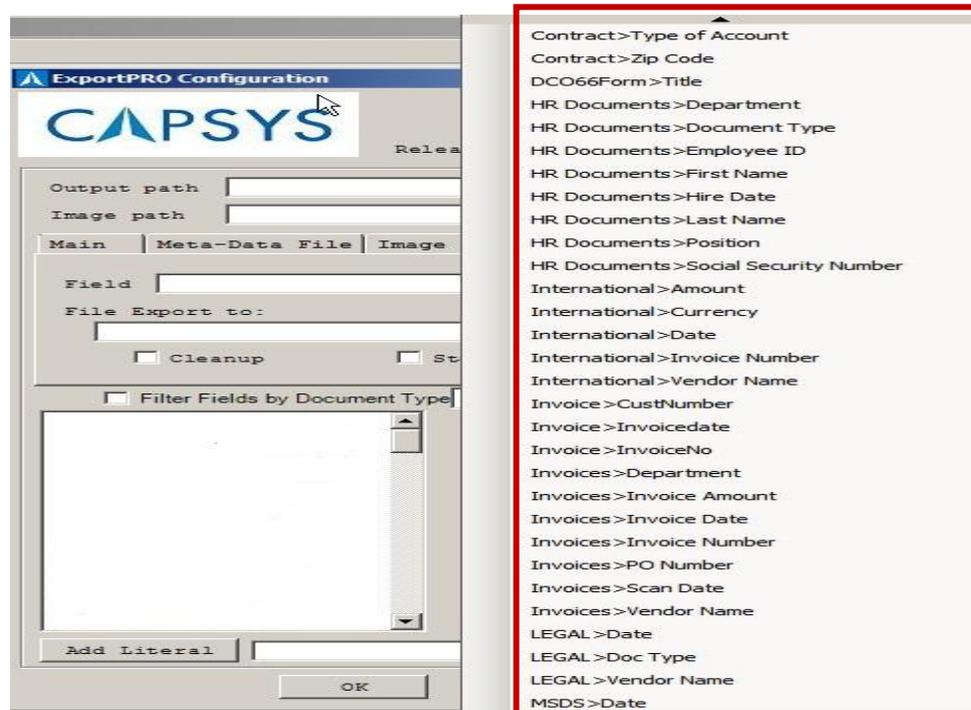


STANDARD OR KOFAX-IMPORT RELEASES

To complete the “**Standard**” and “**Kofax-Import**” Release Types you will be working through and completing information into four of the tabs on the screen above, based on the actual Release Type certain information may not be required. The tabs are Main, Meta-Data File, Image File and Co-OP.

NOTE: In some of the fields on these 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”). This option is available on the following tabs and their corresponding fields:

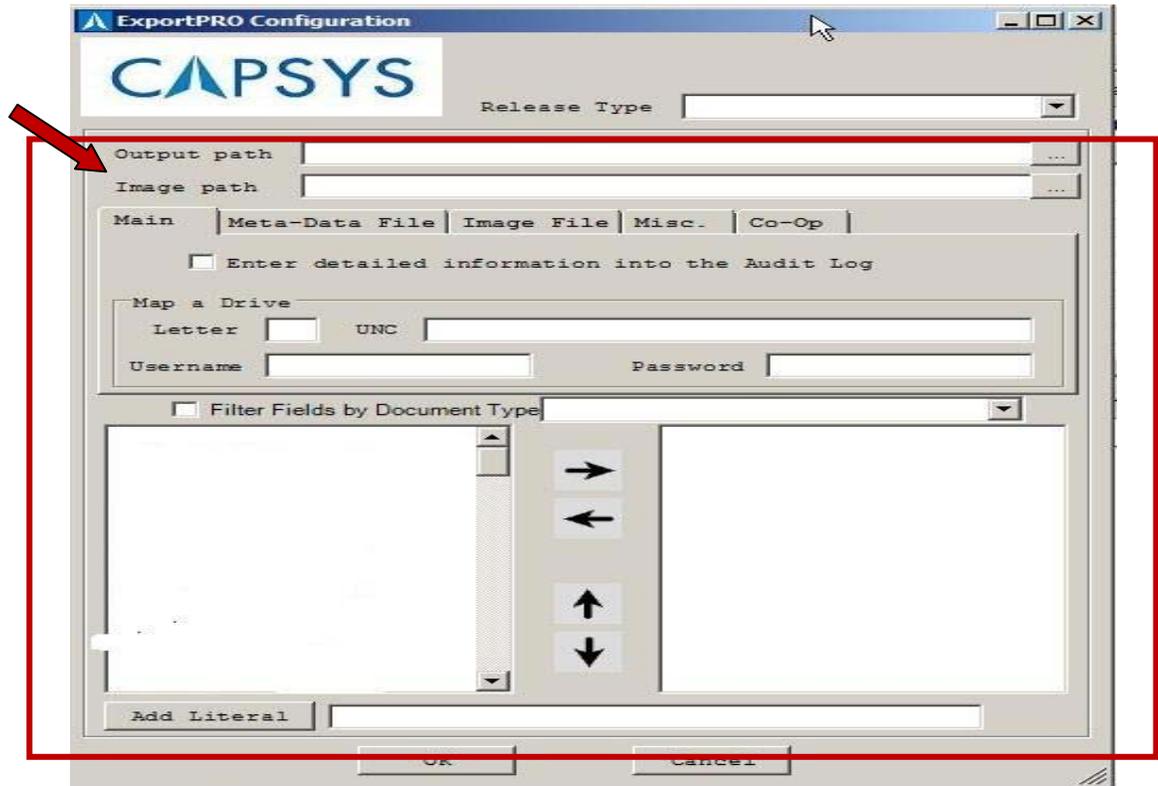
- Main Tab – Output and Image Path
- Meta Data File Tab – Fixed Name
- Image File Tab – Custom Image Filename
- Co-Op Tab – Field and File Export To



1. **"Main Tab"** location you will be completing several pieces of the configuration. These include the Output and Image Path, any special mapping related to the user and the Add Literal Function.
 - 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 (ie: C:\Users\Administrator\Desktop\Image). 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 (ie: C:\Users\Administrator\Desktop\Image). 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 only 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 (or the default/standard paths). The password will be masked in the display.

- D. **“Add Literal function”** is used to add a string to the output file. For example, you can add the image file name to the output file by using a “[file]” as the Literal. You enter the “[file]” to include the output file name from the Image File tab. You can also add only the “literal values” which some 3rd party systems require for input into their repositories (such as specific SQL tables to enter information into as part of the export process).



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 the **“File Extension”** is the extension of the output file and is most commonly a “txt” file, when using the “Standard Release Type”. When using the “Kofax-Import Release Type” a “XML” file is automatically created by ExportPro. You should use “XML” in this field to ensure that the file created has an extension on it.

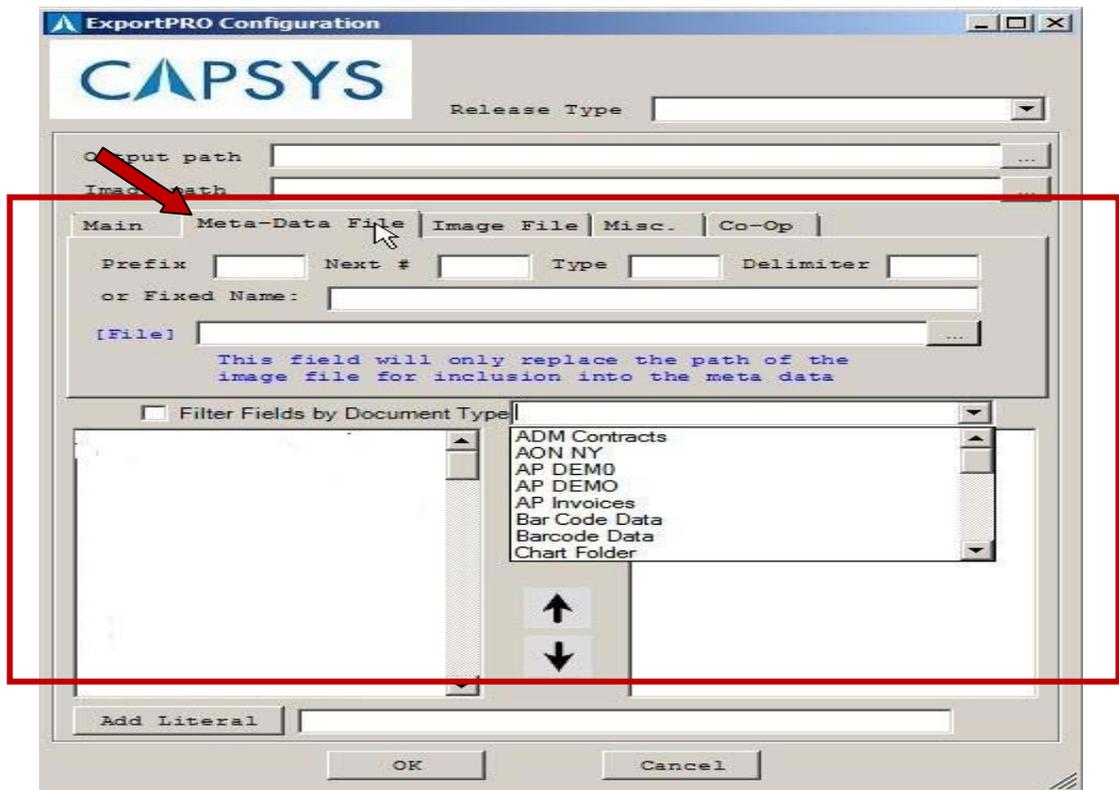
****Sample Output Text File:**

```
APPEND PAGE|hgfd|7/4/2011|gfds|||||hjhhjh|7/29/2011|CAPSYS Admin 2|||||||"Historical Journal Entries"||CAN|dfghn;
```

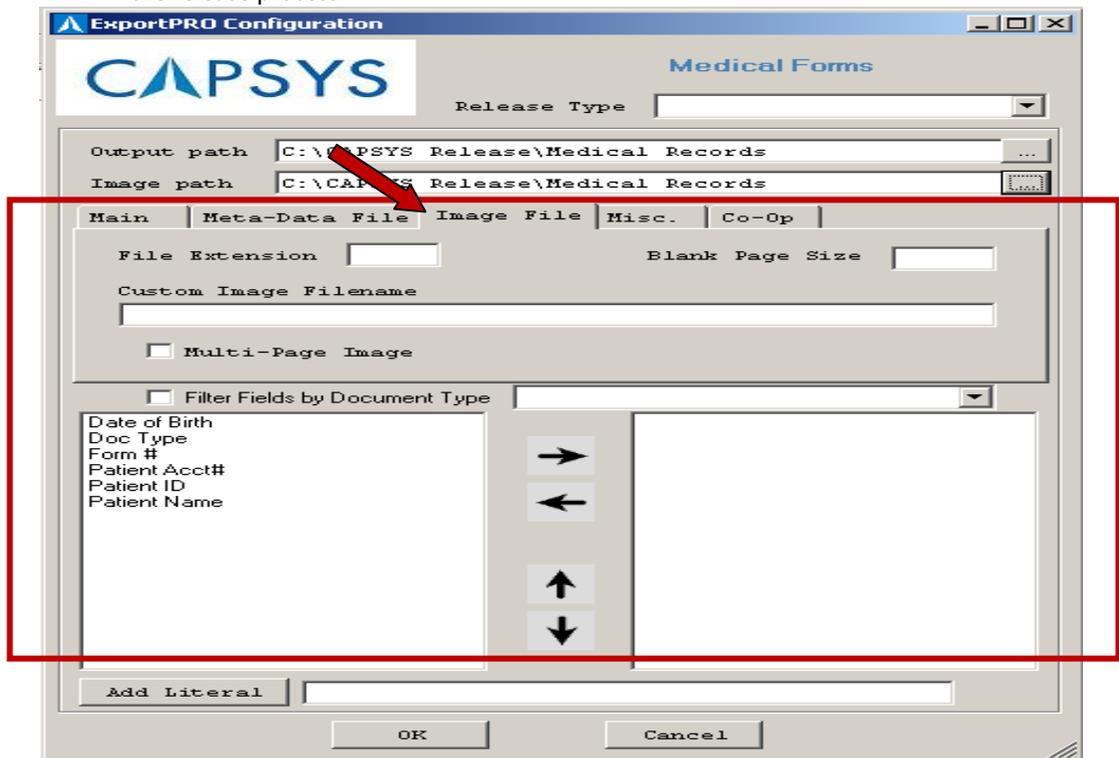
**** Sample Output XML File:**

```
<ImportSession> 1
  <Batches>
    <Batch Name="7/29/2011 9:48:03 AM CID=242"
      BatchClassName="" >
        <BatchFields>
          <BatchField Name="Container Number"
            Value="rftchj" />
          <BatchField Name="Location" Value="CAN" />
          <BatchField Name="Restatement" Value="-" />
        </BatchFields>
      </Document>
    </Document>
    <Indexes>
      <Custodian>cvbnm</Custodian>
    </Indexes>
    <Effective Date>7/4/2011</Effective
Date>
    <Indexes>
      <Entity Code>tyuiop</Entity Code>
    </Indexes>
    <JE REF #1>fghjk</JE REF #1>
    <Indexes>
      <JE REF #2>fghj</JE REF #2>
    </Indexes>
    <LEM>ophgf</LEM>
    <Indexes>
      <Misc>erghn3m,</Misc>
```

- D. **"Delimiter"** is used to separate index values inside the output file that is created, when using the "Standard Release Type". The most commonly used Delimiter is a comma (",") or a bar ("|"). When using the "Kofax-Import Release Type" there is no need to use a delimiter, even if the field is populated it will not appear in the output.
- E. **"Fixed Name"** gives you the ability to use index values or timestamps to name the text output. The **"right click"** method referenced in the **NOTE** at the bottom of Pg 7 can be used in this field. For example, a typical naming convention could be:
 @FIELD=AP DEMO>Invoice Number@TIMESTAMP=yyyyMMddHHmssff
- 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. To build your output file within the "Standard Release Type", select the desired fields and move the desired fields from the left to the right by clicking on the appropriate arrow. You can also sort the fields using the up or down arrow to create a specialized order for the data within the file. In the "Kofax-Import Release Type" this option is not available; all document fields will be included into the output file.
- H. **"Add Literal function"** is used to add a string to the output file when using the "Standard Release Type". For example, you can add the image file name to the output file by using a "[FILE]" as the Literal. You enter the "[FILE]" to include the output file name from the Image File tab. You can also add only the "literal values" which some 3rd party systems require for input into their repositories (such as specific SQL tables to enter information into as part of the export process). When using the "Kofax-Import Release Type" you cannot create custom output files, as the "XML" file format is predetermined. The file will be created using each of the fields captured during the document processing. You can however add the [FILE] so that you can include the output file name as part of the output file data.



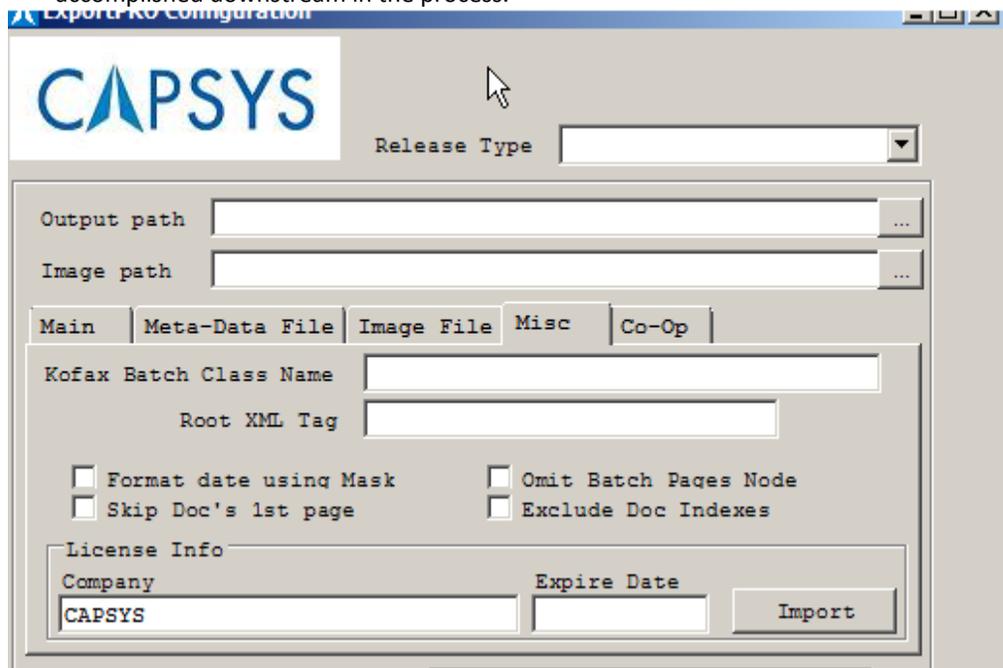
3. "Image File" tab is used to determine how you want image files to be handled during the release process.



- 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 referenced in the **NOTE** at the bottom of Pg 7 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:

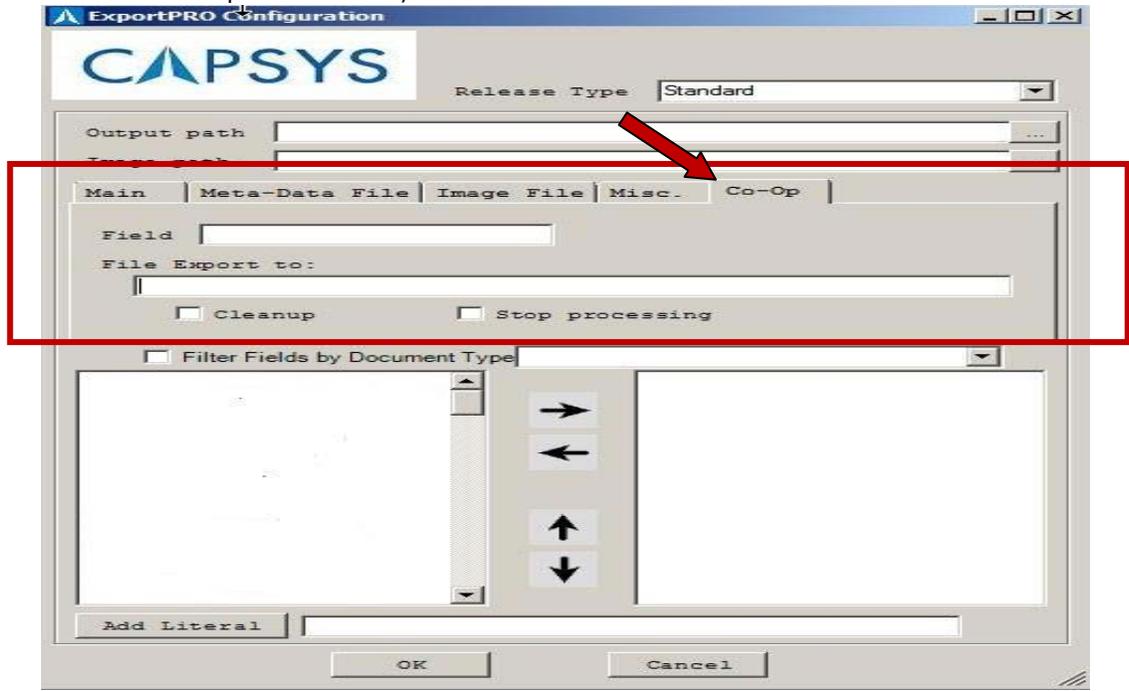
`@FIELD=AP DEMO>Invoice Number@TIMESTAMP=yyyyMMddHHmssff@.TIF`

4. The **“Misc.”** tab is used to create some unique output results that need to be accomplished downstream in the process.



- A. **“Kofax Batch Class Name”** can be input here.
- B. **“Root XML Tag”** can be input here.
- C. **“Format date using Mask”** can be selected if you need a specific output.
- D. **“Skip Doc's 1st Page”** can be selected if you would like to remove a cover or separator page that was used/needed for indexing or validation.
- E. **“Omit Batch Pages Node”** can be selected.
- F. **“Exclude Doc Indexes”** can be selected.

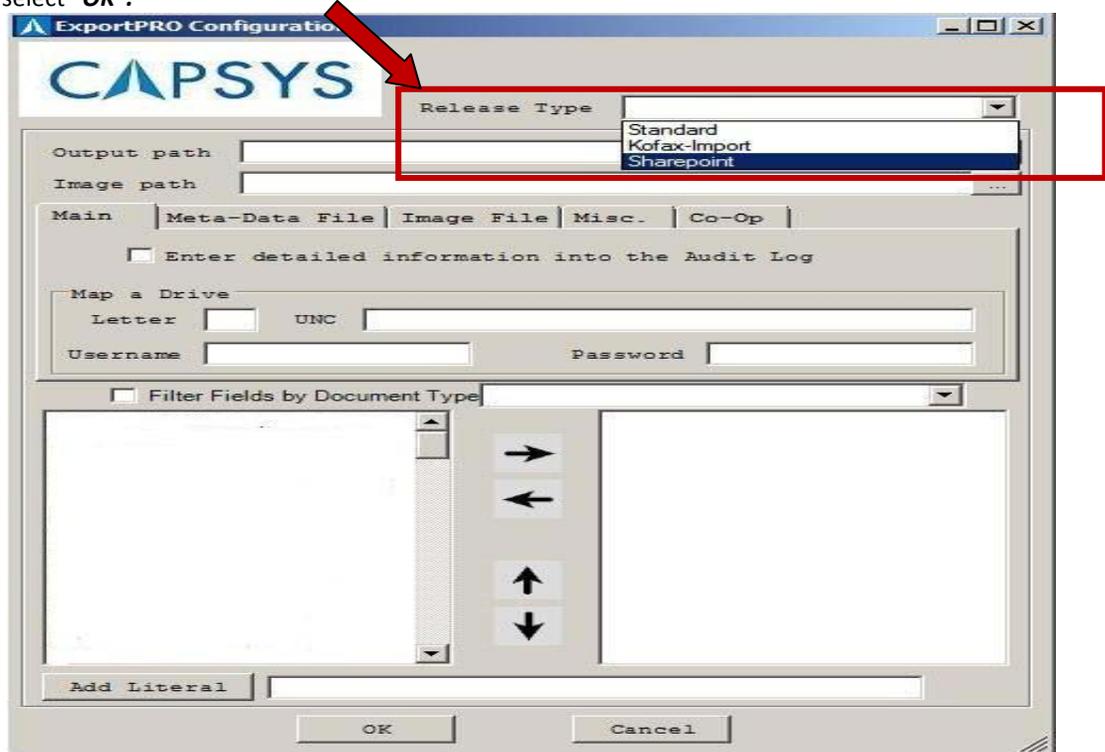
5. The **“Co-Op”** tab is used to configure files created in the CAPSYS CAPTURE OCR Module.
 Note: The Co-Op field, path and other attributes were defined in the CAPSYS CAPTURE OCR Module as detailed below (if using this feature please refer to the setup in this module).



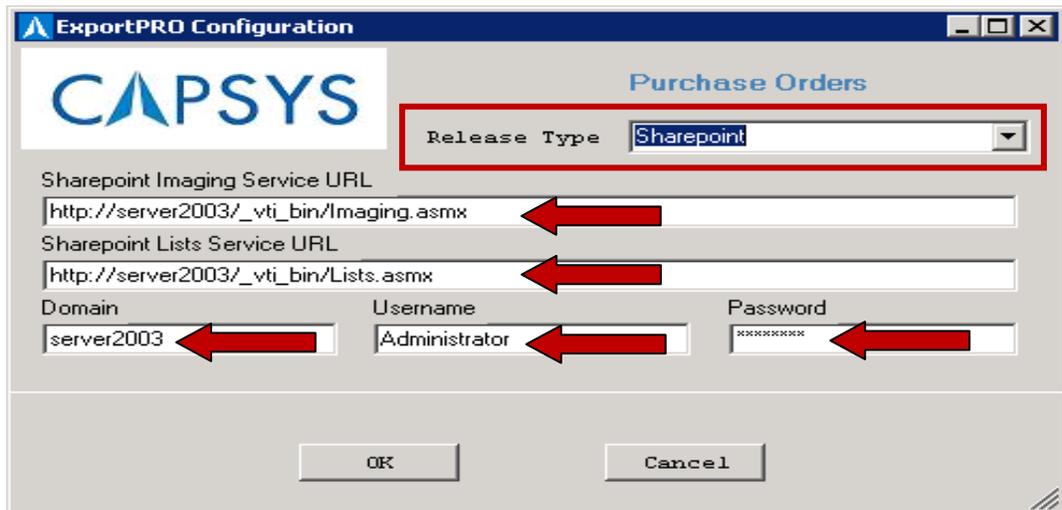
- A. The **“Field”** can be configured so you can use the filename being used in the CAPSYS CAPTURE OCR Module.
- B. The **“File Export to”** is used to detail the pathname of the file along with the file naming convention of that file. The **“right click”** method referenced in the **NOTE** at the bottom of Pg 7 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”**, and fill in the two Sharepoint Web Service URL’s and the Domain, Username and Password that should be used for these two web services, then select **“OK”**.



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”**.





HOW TO CONTACT SUPPORT

Should you require additional assistance, please contact your authorized business partner for support.

To contact CAPSYS:

support@capsystech.com
877.322.7797

To submit a support request via our Website, please visit our [Support Page](#).
Our standard support service hours are from 8am - 5pm Central Standard Time.

Please report any defects or problems that you find in the software by sending an email to the following address:
support@capsystech.com.

In the text of your email, please provide all the following information:

- Operating System and Version
- SQL Version
- IIS version (if applicable)
- Internet Explorer Version (CAPSYS CAPTURE Web)
- Detailed description of the problem
- Step to reproduce the problem (if applicable)
- Exact text of any error messages displayed
- CAPSYS CAPTURE component in which the error occurred (Server Manager, CAPSYS CAPTURE Web Client, etc.)

In addition, please attach a trace log file if one was generated. Trace logging can be turned on by setting the following registry key on the computer for which you wish to enable trace logging.

CAPSYS CAPTURE Server:

HKEY_LOCAL_MACHINE\Software\CAPSYS
TraceFile = "C:\CAPSYSTrace.log" **(Note: The path specified must exist)**

CAPSYS CAPTURE Web Server/Server Manager:

HKEY_LOCAL_MACHINE\Software\CAPSYS
IISTraceFile = "C:\CAPSYSIISTrace.log" **(Note: The path specified must exist)**

WARNING! Turning on the trace logging capability will severely impact system performance. It should be used for diagnostics only.



ABOUT CAPSYS

CAPSYS® is a leading developer of Web based, document capture and capture process management software. The company's flagship product, CAPSYS CAPTURE, can easily and efficiently capture documents from anywhere at any time around the world in a safe and secure environment while eliminating the cost and complexity of supporting additional IT hardware and software environments. CAPSYS solutions are offered both as Software as a Service ("SaaS") hosted in the convenience of our secure data center or as a traditional "on-premise" purchase. To learn more about us or about our proven products, please call 877-322-7797 or visit www.capsystech.com.



COLORADO HEADQUARTERS
6755 EARL DRIVE, SUITE 207
COLORADO SPRINGS, CO 80918

MAIN: (877) 322-7797
FAX: (630) 875-1101



WWW.CAPSYSTECH.COM