CAPSYS CAPTURE

ExportPRO (QSX) Release Module Configuration and Administration Guide

July 20**22**

Version 1.0

[Document Versioning: V1.05]



CAPSYS

6755 Earl Drive, Suite 207 Colorado Springs, CO 80918

PHONE: (877) 322-7797 FAX: (630) 875-1101 www.capsystech.com



Disclaimer	. 2
Providing Feedback about this Guide	. 2
Introduction	. 3
Configuration	.3
Accessing, Configuring and Using the QSX	. 3
Capture Server License – Step 1	. 3
Workflow Setup – Step 2	. 6
Standard or Kofax-Import Releases	. 7
SharePoint Release	14
How to Contact Support	15
About CAPSYS	16

DISCLAIMER

The information contained in this document is subject to change without notice.

CAPSYS makes no warranty of any kind with regard to this material, including, but not limited to, the implied warranties of merchantability or fitness for a particular purpose. CAPSYS shall not be liable for errors contained herein or for direct, indirect, special, incidental or consequential damages in connection with the furnishing or use of this material.

CAPSYS assumes no responsibility for the use or reliability of its software on equipment that does not meet designated minimum hardware specifications.

This document contains proprietary information which is protected by copyright. All rights are reserved. Reproduction, adaptation, or translation without prior written permission is prohibited, except as allowed under the copyright laws.

Copyright © 2010 by CAPSYS Technologies, LLC. All rights reserved. The CAPSYS logo and the CAPSYS CAPTURE logo are trademarks of CAPSYS Technologies, LLC. All other trademarks and logos belong to their respective owners.

PROVIDING FEEDBACK ABOUT THIS GUIDE

If you have comments about this guide or other CAPSYS documentation, please send an email message to <u>support@capsystech.com</u>. In your email message, please specify the document name, version # and section to which your comment applies. If you would like to receive a response to your comments, please include your name along with your contact information in the message.



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:

- A Release multi-page TIF images;
- A Release index values in a formatted text file;
- Name the exported images using index values;
- A 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).

 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.





2. After you have placed the *"ExportPro Release"* icon on the process map, right click on the icon and select *"Configure"*.

🐧 CAPSYS CAPTURE Server Mana	ger												<u> </u>	. 🗆 🗙
▲ File Action View Window	Help												-	8 ×
🗢 🤿 🔰 📅 🔢 🖬														
Server Manager Home Audit Log		NPSYS CAPTU	RE Batch Profile	Save	20	sers 🍂 Status	/alues							
🗉 🚞 Server Groups	Name:		Test - Setup 2			Create Edit I	Picklist Dele	te 🚺 💟						
E Batch Profiles	Defaul	t Doc Type:	(none)		-	Field Name		Data Type	Control Type	Mask	Visible	Sticky	Read Only	Require
AON NY - Batch Level	Batch	Prefix			-									
AP DEMO	Audit	Log Retenti	n Rules											
AP DEMO		where of David	Kanalan 1											
Contracts	Nu	O Delete Old I	o Keep Log: -1											
HP Batch Class		Archive Old	Entries to Files											
International Invoices		LINC Eolder												
TNVOICES		Archive Old	Entries to Database											
e LEGAL		Connection			-									
Loan Documents		Connection	•			•								•
Manual Indexing		Start	PQueue & OSX	Assembly	2 Stop	Activate	Q - 14 Ma	ke Template						
OCR Demo		2 Data Chara	Cirls have be used as	Drinsibur 0	-	-								_
Orphan Docs	Proces	s Data Store:	Click here to set	Phonty: 0	<u> </u>									
POD Batch														-
Regulatory														
Sales Order					1 6	8 8								
StarePoint Pelease Tes					6									
Shipping														
Shipping with Barcode					4	~								
Shure					Expor	Confi	aure <	1	1					
🧃 test						-			-					
Test - Setup 2						FIOF	ciucs							
US Invoices						X Delet	e							
Web Order														
🗉 🚞 Document Types														
Users														
QSX Modules														
Ø Licenses	-													-
· · · · · · · · · · · · · · · · · ·														►

3. 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).

A ExportPRO Configuration	
Output path Image path	
Main Meta-Data File Image File Misc. Co-Op Kofax Batch Class Name License Info Company Expiration Date Import	
Filter Fields by Document Type	
Add Literal	
OK Cancel	



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

A ExportPRO Configuration	<u>_ ×</u>							
	_	ive pe	Control Type	Mask	Visibl	e Sticky	Read Only	Rei
Output path								×
Kofax Batch Class Name	Desktop	-		🔻 🔯 Se	arch			9
	🕛 Organize 🔻 🏢 Vie	WS	🔹 📑 New Fo	der				0
Company	Favorite Links		Name 🔺		- s	iize 🚽	Туре	
Expiration Date Import	Desktop Computer Documents Pictures Music		desktop.ini FB Demo Image Loan Docum Release Tranfer	ents		1 KB	Configuration File Folder File Folder File Folder File Folder File Folder	15
	 Recently Changed Searches 		CAPSYS CAP	PTURE Server Manager MO.PLD		2 KB 14 KB	Shortcut PLD File	
	J Public		desktop.ini			1 KB 89 KB	Configuration QXF File	15
•			ExportPRO_	CAPSYS.lic	5 tif	1 KB 1 KB 943 KB	LIC File Internet Sho	rtx
+	Folders	^			brut		La	
Add Literal	File n	ame:				Open	Cancel	

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

ExportPRO Configuration	
	-
Output path	
Image path Main Meta-Data File Image File Misc. Co-Op Kofax Batch Class Name	
License Info Company CAPSYS Expiration Date Import	-
Filter Fields by Document Type	
Add Literal	
OK Cancel	



6. You are now ready to begin building the remainder of the *"ExportPRO"* Configurations for your workflow.

▲ CAPSYS CAPTURE Server Manag	jer			47			4				-	
▲ File Action View Window H	Help											a ×
🔶 🔿 🞽 🖬 🛛 🖬												
Audit Log	CAPSYS CAPTU	IRE Botch Profile 🛃 Save	20	sers 🍂 Status Values								
🕀 🚞 Server Groups	Name:	Test - Setup 2		Create Edit Picklist	Delete	· 🖸 💟						
E 🚞 Batch Profiles	Default Doc Type:	(none)		Field Name	1	Data Type	Control Type	Mask	Visible	Sticky	Read Only	Require
AON NY - Batch Level	Batch Prefiv:	(init)		1.7.000.000								
AP DEMO	Audit Lee Detent	ing Bulan								-		
AP DEMO	Audit Log Retent	ion kules:										
Contracts	Number of Days	to Keep Log: -1										
Create PDF	O Delete Old	Entries										
HR Batch Class	O Archive Oid	I Entries to Hies										
INVOICES	UNC Folde											
LEGAL	O Archive Old	Entries to Database								-		
Loan Documents	Connection	1:		•								•
Manual Indexing	K K Start		1 Stor	Activate Q + 1	Make	Template						
MSDS		O docor Modow Aronemony	3 500	Concordice 1	Automo	rempione						
Orphan Docs	Process Data Store:	Click here to set Priority: 0	•									-
POD Batch												-
Regulatory												
Sales Order		8		8 8								
je seko			1									
SharePoint Release Tes			. Co									
Shinning with Barcode			0	2								
Shure			Ехро	'tPRO								
🧉 test		8		8 8								
Test - Setup 2												
Underwriting Review												
Web Order												
T C Document Types												
🕹 Users												
🙀 QSX Modules												
Ø Licenses	-											-
1 Conversi Cottinan	•											Ŀ

WORKFLOW SETUP - STEP 2

1. 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.

	Release 1	rype Sta	ndard	
Output path		Kof	ax-Import	
Tmage path		Isna	arepoint	
image pacin	21	i.	2	
Main Meta-Data Fi	le Trage File	Mico	- co-op	
I Enter detaile	d information	into the	Audit Log	
Map a Drive				100
Letter UNC				
Detter ONC				
Username		Passwo	rd	
Username		Passwo	rd 🗌	
Username Filter Fields by Doo	cument Type	Passwo	rd	
Username Filter Fields by Doo	sument Type	Passwo	rd	
Username		Passwo	rd	
Username Filter Fields by Doc		Passwo	rd	
Username Filter Fields by Doc	sument Type	Passwo	rd	
Username Filter Fields by Doo	sument Type	Passwo	rd	
Username Filter Fields by Doo	sument Type	Passwo	rd	
Username Filter Fields by Doc	sument Type	Passwo	rd	
Username Filter Fields by Doc	zument Type → ←	Passwo	rd	
Username Filter Fields by Doo	sument Type	Passwo	rd	
Username Filter Fields by Doo	sument Type	Passwo	rd	
Username Filter Fields by Doc	sument Type	Passwo	rd	
Username Filter Fields by Doc	zument Type → ←	Passwo	rd	

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 <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 (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).

	Release Typ	e	
Output path			
Main Meta-D	ata File Image File	Misc. Co-Op	
Enter o	detailed information in	nto the Audit Log	
Map a Drive			
Letter	UNC	1	
Username		Password	
Filter Field	is by Document Type		<u> </u>
	$\exists \rightarrow$		
~	T		
13 HR			
	Ť		

- 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|||hjhhijh|7/29/2011|CAPSYS Admin 2|||||||"Historical Journal Entries"||CAN|dfghn

** Sample Output XML File	
KimportSession> [
Chatteness	Namo-#7/20/2011 0.48.02 DM CTD-242#
BatchClassNames!!!	Mane- //25/2011 5.10.05 MA CID-212
Daconciassivane-	Batobrialdes
2	ZetchField Name="Container Number"
Value=""ftobi" />	Contracted Mane Contracted ManDer
Value- 110gnj //	<pre> / RatchField Name="Location" Value="CIN" /></pre>
	<pre></pre>
	/BatchFielda>
	<indexes></indexes>
	<custodian>cvbnm</custodian>
	<indexes></indexes>
	<effective date="">7/4/2011</effective>
Date>	
	<indexes></indexes>
	<entity code="">tyuiop</entity>
	<indexes></indexes>
	<je #1="" ref="">fghjk</je>
	<indexes></indexes>
	<je #2="" ref="">fghj</je>
	<indexes></indexes>
	<lem>ophgf</lem>
	<indexes></indexes>
	<misc>erghnjm, </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=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. 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 be 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.



Opput path	Releas	е Туре	
Main Met Prefix or Fixed N [File] The in	a-Data File Image F Next # ame: is field will only r age file for inclusi	Type Co-Op Type Delimiter	
Filter	Fields by Document Type	DM Contracts ON NY P DEM0 P DEMO P Invoices ar Code Data arcode Data hart Folder	

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

▲ ExportPRO Configuration
CAPSYS Medical Forms Release Type
Output path C:\/PSYS Release\Medical Records Image path C:\CAP \S Release\Medical Records
Main Meta-Data File Image File File Extension Blank Page Size Custom Image Filename Multi-Page Image Filter Fields by Document Type Date of Birth Doc Type Form # Patient Acct# Patient ID Patient Name
Add Literal OK Cancel



- 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 DEM0>Invoice Number@TIMESTAMP=yyyyMMddHHmmssff@. TIF

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

CAPSYS Release Type	•
Output path	
Image path	
Main Meta-Data File Image File Misc Co-Op	
Kofax Batch Class Name Root XML Tag	
Format date using Mask Omit Batch Pages Node Skip Doc's 1st page Exclude Doc Indexes	
License Info Company Expire Date CAPSYS Import	

- 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 ExportPRO Configuration	
CAPSYS Release Type Standard	
Output path	
Main Meta-Data File Image File Misc. Co-Op	
File Export to:	
Filter Fields by Document Type	_
Add Literal	
	111

- 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"*.

utput path	Release	Type Stand Kofax Share	lard -Import point	
ain Meta-Data Enter deta Map a Drive Letter U	File Image Fi iled informatio	le Misc. on into the	Co-Op Audit Log	
Filter Fields by	Document Type	*		
		†		

 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".

Kerner Configuration		-	. 🗆 🗙
CAPSVS		Purchase Orders	
CRISIS	Release Type	Sharepoint	•
Sharepoint Imaging Service URL			
http://server2003/_vti_bin/Imagin	ng.asmx		
Sharepoint Lists Service URL			
http://server2003/_vti_bin/Lists.a	asmx		
Domain U	Isername	Password	
server2003	Administrator	******	
OF	ζ	Cancel	
			///

CAPSYS CAPTURE Configuration and Administration Guide CAPSYS CAPTURE ExportPRO QSX



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 <u>Support Page</u>. 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 <u>www.capsystech.com</u>.



COLORADO HEADQUARTERS 6755 EARL DRIVE, SUITE 207

COLORADO SPRINGS, CO 80918

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

CAPSYS

WWW.CAPSYSTECH.COM