Content Manager

Software Version 24.3

Kofax Capture Template

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Introduction

Kofax Capture integration with Content Manager is designed to meet large, centralized, high-volume scanning and storage requirements.

Kofax Capture enables you to set up batch processes for documents that are to be scanned. You can select and extract the appropriate indexes from the scanned documents. The document images and their respective indexes are then stored within Content Manager for future retrieval, Workflow and long-term storage requirements.

Kofax Capture uses the Content Manager Software Development Kit (SDK) to access the Content Manager features.

Kofax Capture uses a COM component to configure the process for a document class/batch class pair that exports document index data to Content Manager, which is updated using the Content Manager SDK.

This connector exports images and full-text OCR files to the Content Manager database. Content Manager comes with the appropriate export connector that can be imported into Kofax Capture.

Document classes can be defined within Kofax Capture. They provide a convenient mechanism for associating the same group of index fields to multiple form types.

You can define a document class and then add one or more form types to it. Then you can associate a set of index fields to the document class.

The same set of index fields will be shared across all the form types defined for the document class.

The scope of this document

This document describes the steps to achieve a basic integration between the two products. This document assumes that Kofax Capture and Content Manager are installed.

There are three components to this integration:

- Specify the batch and document index settings to be used for the integration within Kofax Capture Administration

- The process of scanning images and performing Content Manager index validation within Kofax Capture Batch Manager

- The final process of exporting document images to Content Manager and automatically attaching them to the records created using the Content Manager Control Panel within Kofax Capture Batch Manager

Setting up Kofax Capture

Before attempting to configure document classes for Content Manager or exporting, install these applications:

- Kofax Capture stand-alone or on a server
- Content Manager

The Content Manager client is required for validation or verification and export.

See **CM24.3_Spec.pdf** for detailed system requirements for Content Manager Kofax Capture integration.

Export connector installation

The following section contains information about setting up the **Kofax Capture for Content Manager** export connector.

For additional information regarding Kofax Capture document classes and index fields, refer to Kofax Capture Help.

1. Run the Content Manager export connector **CM_Kofax_x86.msi** on the export computer

2. Start **Kofax Capture > Administration**

3. On the **Tools** tab, select **Export Connectors**

4. Click **Add** to use the **Open** dialog

5. Select the file **TRIM[number].inf** in the folder **C:\Program Files\Kofax\Capture\Bin** and click **Open**.

   For example, Kofax 11, the file name would be **TRIM11.inf**.

   A dialog with a list of export connectors to choose from appears.

6. Select **Content Manager Export Connector** and click **Install**.

   A message box displays **Registration Complete**.

   The Content Manager export connector is now available for use with your document classes.

7. Click **OK** to close the message box

8. Click **Close** to close the **Add Export Connectors** dialog

9. Click **Close** to close the **Export Connector Manage**r dialog

10. On the Kofax button in the top left corner of the Quick Access toolbar, click **Exit** to close **Kofax Capture > Administration**

> **NOTE:** The installation procedure should correctly register all the export connector files.

However, if, when running a batch process, you see a message such as **Unable to find CLSLID for ProgID tsjASCOCX.TRIMControl**, then you will need to manually register the file in the message. In this example, register the file **tsjASCOCX**.

Installing the Content Manager Control Panel

Repeat the installation procedure for validation/verification computers that will use the **Content Manager Control Panel**.

See Verification / Validation.

NOTE: This step is only required if different computers are used for validation/verification and export.

Importing Content Manager field types

The Content Manager integration relies upon predefined field types that must be present in your Kofax Capture database. These field types are part of a sample batch class called **Content Manager Batch Template**, which has been provided for your convenience.

Follow these steps to import the fields:

1. Start **Kofax Capture > Administration**

2. On the Home tab of the toolbar ribbon, click **Import**.

   The **Open** dialog appears.

3. Select the file **Content Manager Kofax Template.cab** in the **C:\Program Files\Kofax\Capture\Export** folder and click **Open**.

   The **Import/Export** dialog appears and the package is unpacked.

4. Click **OK** when the message **Completed** appears

5. In the **Import** dialog, select **Content Manager Batch Template** from **Available Batch Classes** and click **Add**

6. Select either **Do not import duplicates** or **Replace duplicates with items imported**.

   The option **Do not import duplicates** ensures that the work done to date will not be overwritten.

7. Click **Import**.

   The import progress log appears.

8. Click **OK** when the import is complete.

   The **Content Manager Batch Template** appears on the **Batch** tab of the **Definitions** window.

9. Use **Exit** on the **Kofax** button to close Kofax Capture Administration

During the import stage, a number of field types are imported which have a prefix of **CM_** to the field name, for example, **CM_title** and **CM_Date created**.

The description of each field indicates the Content Manager record field that these types refer to. You can create new fields on your document class that use these imported field types to automatically pass the contents from the document to the appropriate Content Manager record field.

Defining the location of the scanned image

For Kofax Capture to process scanned images into Content Manager, you need to define a folder.

You can change it when processing a batch.

1. Start **Kofax Capture > Administration**

2. In the **Batch** tab of the **Definitions** window, select the **Content Manager Batch Template** and click **Properties**.

   The **Batch Class Properties** dialog appears.

3. On the **General** tab, if the path in the field **Image folder** is incorrect, type the full path of the location of the scanned documents or use **Browse** to select the folder

4. Click **OK** to save the location and close the properties

5. Use **Exit** on the **Kofax** button to close Kofax Capture Administration

Defining a document class

The sample batch class includes a sample document class called **Records Manager Document Template**. It represents a common type of document that may be scanned and stored as a record in Content Manager. It also demonstrates how to use the predefined field types.

You can modify this document class to suit your needs. If you need multiple document classes for different kinds of records, you can re-import and modify the sample batch and document classes as many times as you need to.

Guidelines for creating document classes for use with Content Manager

- Each import requires unique names for the batch and document templates (select template, then press **F2**); otherwise, the import process overwrites the existing templates

- Mandatory fields - every document class that is to be used to create Content Manager records must have two mandatory hidden fields in addition to the index fields that will be associated with the documents of this class.

   These mandatory fields are **CM_RecordUri** and **CM_RecordId**, and each must have a field type of the same name. The **Hidden** property of each field must be set to **True**, and all other properties should be set to **False**.

   See the first two field entries in the Content Manager document template shown above.

   The field references **CM_RecordUri** and **CM_RecordId** are case sensitive – you should spell them exactly as above.

   Name changing is not acceptable for mandatory fields.

- Index fields - when your document class includes the mandatory fields, you can add other fields to the document class to automatically pass data entered or captured through Intelligent Character Recognition at the validation stage to the Content Manager record created for each

document.

For example, if your document class includes an index field representing a title for the document, you can have the value of the field automatically sent to the Content Manager Record Title field when you create the record.

This is particularly useful if the title has been automatically captured from the scanned document using ICR.

Viewing or modifying the existing index fields

1. **Start Kofax Capture > Administration**
2. In the **Batch** tab of the **Definitions** window, expand the **Content Manager Batch Template**
3. Select the document class, for example, **CM Document Template** and click **Properties**.

   The **Document Class Properties** dialog appears.

   The existing field type and index fields within the class appear on the **General** tab.
4. Click on the field type to change
5. Click on the column to modify and make your changes
6. Repeat for each column to modify
7. Repeat for each row to modify

   > **NOTE:** Name changing is not acceptable for the field Internal Barcode.

8. When you have completed your changes, click OK to close the properties
9. Use **Exit** on the **Kofax** button to close Kofax Capture Administration

Adding a new field type

1. Start **Kofax Capture > Administration**
2. In the **Batch** tab of the **Definitions** window, expand the **Content Manager Batch Template**
3. Select the document class, for example, **Content Manager Document Template** and click **Properties**.

   The **Document Class Properties** dialog appears.

   The existing field type and index fields within the class appear on the **General** tab.
4. Click **New Field Type…**
5. Type a name, following these instructions:

   - The field name should be **CM_** and then the exact name of the Additional Field.

     This is very important. If the name of the field does not match the name of the Additional Field, it will not work.

- You should ensure that you only use each **CM_** field type no more than once on each document class.

  The exception to this is the **CM_notes** field. If you have several document fields using this type, the contents of each will be passed to the **Notes** field on the Content Manager record, where the contents of each field will be preceded by the field name that you have chosen. If more than one **CM_notes** field is used, then each must have a unique name.

6. Fill in the field **Description** with a description of your choosing

7. Select a **Data Type**.

   See below for tips on matching data types.

   > **NOTE:** You cannot delete a field type once it has been created.

8. When you have completed your changes, click **OK** to close the properties

9. Use **Exit** on the **Kofax** button to close Kofax Capture Administration

Matching data types

- The Content Manager export connector for Kofax Capture supports all Content Manager Additional Fields **EXCEPT** date and time combined fields.

  Kofax has a separate data type for date and time.

- For Additional Fields of type **Decimal** or **Currency**: use **DECIMAL** or **NUMERIC** data type.

  Ensure the digits and decimal places are equal or less than that set in the Additional Field in Content Manager (1 to 15 digits, no negative numbers).

- For Additional Fields of type **Boolean**: use **VARCHAR** data type.

  Ensure the data read from the form is either **TRUE/FALSE**, **YES/NO** or **1/0**.

- For Additional Fields of types **String or Text**: use **VARCHAR** data type.

  Ensure the number of characters is equal or less than the field length set in the Additional Field in Content Manager (up to 254 characters)

- For Additional Fields of types **String or Text** based on **Lookup Sets**: use **VARCHAR** data type.

  Ensure the number of characters is equal or less than the field length set in the Additional Field in Content Manager (up to 254 characters)

- The data read from the form needs to match the case sensitivity of the values in the Lookup Set exactly or it will not register correctly when the record is created in Content Manager and a blank value will be used instead.

- For Additional Fields of Date: use **Date**.

- For Additional Fields of **Number** or **Large Number**:

  - use **INTEGER** - from Kofax: Numeric value with the number of numeric digits equal to 10, and the number of decimal places equal to 0 The range is -2,147,483,648 to 2,147,483,647.

    ◦ use **SMALLINT** - from Kofax: Numeric value with the number of numeric digits equal to 5, and the number of decimal places equal to 0 The range is -32,768 to 32,767.

Adding or deleting index fields

To add or delete an index field, see the Kofax Capture Help file.

OCR

Enabling OCR in the batch process

Some document classes may need to be set up with Optical Character Recognition (OCR) enabled.

Setting up OCR for a document class

1. Start **Kofax Capture > Administration**
2. In the **Batch** tab of the **Definitions** window, expand the **Content Manager Batch Template**
3. Select the document class, for example, **CM Document Template** and click **Properties**.
4. The **Document Class Properties** dialog appears.
5. Select the **OCR** tab
6. Select **Enable OCR full text**
7. Click **OK** to close the properties dialog
8. Right-click **Content Manager Batch Template** and click **Properties**.
9. The **Batch Class Properties** dialog appears.
10. Select the **Queues** tab
11. From **Available Queues**, select **OCR Full Text** and click **Add** to move it to **Selected Queues**
12. Click **OK** to close the properties dialog
13. Use **Exit** on the **Kofax** button to close Kofax Capture Administration

You can now attach OCR text renditions to a record.

Setting up OCR full text configuration

OCR full text configuration does not work with the default output format.

To change it:

1. Start **Kofax Capture > Administration**
2. In the **Batch** tab of the **Definitions** window, expand the **Content Manager Batch Template**
3. Select the document class, for example, **CM Document Template** and click **Properties**.
4. The **Document Class Properties** dialog appears.
5. Select the **OCR** tab.

6. Select **Enable OCR full text** if not already selected

7. In the **Recognition Profiles** field, select **Kofax Advanced OCR Full Text**

8. Click **Edit**

9. The **Recognitions Profiles** dialog appears.

10. Towards the bottom of the dialog, click **Output…**

11. The **Advance OCR Output Format** dialog appears.

12. In the **Output Format** field, select **Rich Text Format (.rtf)**, **Microsoft Word (*.doc)** or **Microsoft Excel (*.xls)**

13. Click **OK** to close the **Advance OCR Output Format** dialog

14. Click **Close** to close the **Recognitions Profiles** dialog

15. Confirm the changes and save your profile

16. On the **Properties** window, change the **Recognition Profiles** field to display your profile

17. Click **OK** to close the properties dialog

18. Use **Exit** on the **Kofax** button to close Kofax Capture Administration

Using the batch class

When you are finished with setting up your document classes within the Content Manager batch class, use the following steps to set up and publish the class:

1. Set up the export connector for each document class

2. Validate each document class script

3. Publish the batch class

Setting up the export connector for a document class

1. Start **Kofax Capture > Administration**

2. In the **Batch** tab of the **Definitions** window, expand the **Content Manager Batch Template**

3. Select the document class, for example, **CM Document Template**

4. On the **Home** tab of the toolbar ribbon, click **Export Connectors**

5. The **Export Connectors** dialog appears.

6. From the list of **Available Export Connectors**, select **Content Manager Export Connector** and click **Add** to add it to the list **Assigned Export Connectors** or click **Setup** if it is in that list already.

7. The **Content Manager Setup Script** dialog appears.

8. On the **Record Manager** tab, click **Select database** to choose the dataset the integration should use.

9. The Open **Content Manager Dataset** dialog appears.

10. Select a registered dataset and click **OK** to close the **Open Content Manager Dataset** dialog

11. On the **Content Manager** tab, click **Select record type** to choose the default Record Type the integration should use when creating records from scanned documents.

12. The **Select from Record Types** dialog appears.

13. Only those Record Types set up for electronic documents appear in the list.

14. Choose one and click **OK** to close the **Select from Record Types** dialog

15. Optional: Check the **Use Content Manager Index Fields** option to force the integration component to automatically transfer the values of the Content Manager index fields on this document class to the created Content Manager record, i.e. those index fields with a type name prefixed with **CM_**.

    > **NOTE:** If your document class does not use any index fields specified as one of the predefined CM_ types, clearing this option improves performance slightly.

16. Optional: Select the option **Allow user to change** to allow the validation users the ability to change the Record Type when they are creating records, rather than going with the default Record Type

17. If this option is not selected, the default Record Type name must be validated by connecting to Content Manager

18. Optional: The **General** section of the **Content Manager** tab enables the administrator to determine whether or not the Content Manager control panel will initially be visible to the validation user.

    - Choose **Automatically invoke Record creation** so the control panel will not be visible and the **Create Record** dialog will appear automatically.

    - Choose **Show Integration Control Panel** so the control panel will be visible, and the **Create Record** dialog will appear only when the user clicks **Create Record** on the control panel.

19. Optional: The **Event Monitor** section enables the administrator to determine whether the event monitor on the Content Manager control panel will be visible. These options are only available when the option **Show Integration Control Panel** is selected.

    - Choose **Show** so the Event Monitor is initially visible. The user can hide it.

    - Choose **Hide** so the Event Monitor is not initially visible. The user can display it.

    - Choose **Disable** so the Event Monitor is not visible. The user cannot display it.

20. Optional: The **Queues** section enables the administrator to choose the batch processing stage the control panel is used for creating Content Manager records.

    - Choose **Validation** so that the records will be created during the validation stage.

      Select this option if the batch will not use the verification stage.

    - Choose **Verification** so that the records will be created during the verification stage.

      Select this option if the batch will use the verification stage.

21. Optional: The **Record Policy** section enables the administrator to determine what options are available when creating Content Manager records from the documents in a batch.

    - Choose **Allow user to selectively create Records** so that no warning appears when the user does not create a record for each document.

      Ensure another option is selected to be prompted to create a Content Manager record.

    - Choose **Warn if Record is not created** so that a warning appears when the user does not create a record for each document.

    - Choose **Require a Record for every document** so that an error message appears when the user does not create a record for each document and the batch will not be completed until all records are created.

22. Change to the **Document type** tab.

23. The **Export Images As** section enables the administrator to choose the format to save the exported images as.

24. For **Image Type**, choose one of the following options:

    - **Multipage TIFF - CCITT Group4** - default
    - **Multipage TIFF - CCITT Group3**
    - **Multipage TIFF - Uncompressed**
    - **Multipage TIFF - CCITT Group 3/2D**
    - **Multipage TIFF - JPEG Compression**
    - **JPG - JPEG Compression**
    - **PDF – Multipage TIFF**
    - **Kofax PDF**

25. For **Export Folder**, click **Browse**, select a folder, and then click **OK**.

    The images will be deleted from this folder after being exported to Content Manager.

    The **Browse** button is not available for **Kofax PDF**.

    - Choose **Skip First Page** to not export the first image in the document, for example, because it is a separator sheet

    - Choose **Export OCR Full Text** to export an additional **.txt** file with the text that was scanned and recognized.

      This option enables you to index the image text and therefore make it searchable.

26. When your changes are complete, click **OK** to close the **Content Manager Setup Script**.

27. Use **Exit** on the **Kofax** button to close Kofax Capture Administration

> **NOTE:** Always remember to re-publish your batch class after making changes to the export connector settings, or they will not be used.

Validating the document class script

1. Start **Kofax Capture > Administration**

2. In the **Batch** tab of the **Definitions** window, expand the **Content Manager Batch Template**

3. Select the document class, for example, **CM Document Template**

4. On the **Home** tab of the toolbar ribbon, click **Validation Script**

5. The **Document Validation Script** dialog appears.

6. Make sure **Document classes** and **Script name** are both set to **CM Document Template**

7. Click **Create** to open the editor.

8. The SBL editor appears.

9. Click the **Check** (√) button in the toolbar.

10. The script should compile without error and it should state in the status bar at the bottom of the SBL editor that the script compiled successfully.

11. On the **File** menu, click **Exit** to close the SBL editor

12. Click **Close** to close the **Document Validation Script** dialog

13. Use **Exit** on the **Kofax** button to close Kofax Capture Administration

Publishing the batch class

1. Start **Kofax Capture > Administration**

2. In the **Batch** tab of the **Definitions** window, expand the **Content Manager Batch Template**

3. On the **Home** tab of the toolbar ribbon, click **Publish**

4. The **Publish** dialog appears.

5. Click **Validate**.

6. This option validates the selected batch class. The validation process runs stringent checks on your batch class selections.

   The results of the validation process appear in the **Results** box.

   There should be 0 warnings and 0 errors.

   > **NOTE:** Validating your batch classes is a good way to check your selections as the batch classes are created. It might be especially useful when you are editing a batch class and are not ready to make it available for use. You can validate the batch class as you make your changes to troubleshoot possible problems.

7. Click **Publish**.

8. This option checks the batch class selections and publishes the selected batch class.

   The results of the publishing process appear in the **Results** box.

There should be 0 warnings and 0 errors.

9. If there are errors, the batch class will not be available to users for creating batches. Correct the problems and republish.

10. Click **Close** to close the **Publish** dialog

11. Use **Exit** on the **Kofax** button to close Kofax Capture Administration

After the batch class has been published successfully, new batches can be created based on this batch class. The setup is now complete.

Validation / Verification

This section describes the use of the Content Manager control panel to interactively create Content Manager records.

The appearance and behavior of the Content Manager control panel is determined by the settings in the export connector setup described earlier. Depending on the option you selected during setup, the control panel may appear in the validation stage or the verification stage.

The behavior described below is the same in either case.

Logging in to Content Manager

1. Start the program **Kofax Capture > Batch Manager**

2. On the **Home** tab of the toolbar ribbon, click **Create**.

3. The **Create Batch** dialog appears.

4. On the **General** tab, choose a batch class.

   Content Manager Batch Template should be already selected.

5. In the field **Name**, type a description of the job, click **Save** and then click **Close**.

6. The batch appears in the **Kofax Capture Batch Manager** window.

7. On the **Home** tab of the toolbar ribbon, click **Process**

Content Manager Control Panel

If you selected the option **Show Integration Control Panel** in the Content Manager export connector setup, then the control panel appears next to the list of index fields.

You can move the control panel to another position or have it float as a window by placing the mouse pointer just outside the border of the panel and dragging it to a new position. The panel will remain in the new position in subsequent sessions. You can also hide or show the Control Panel using the menu command **View > Toolbars > Content Manager Control Panel**.

- **Record Number** – the Content Manager record number

- **Record Type** – the Content Manager Record Type to use for new Content Manager records. Determined by what was selected in the **Content Manager Setup Script** dialog.

You can choose a Record Type if the option **Allow user to change** was selected in the **Content Manager Setup Script** dialog.

- **Select record type** - to select a Content Manager Record Type.
  Only Record Types set up to use a document store appear in this field.

- **Connection Status fields** - display information about the connection to the Content Manager SDK

- **Event Monitor** – select to turn the event monitor on.
  The event monitor logs activity that the control panel is performing.

Creating a record for the current document

1. **Create Record** - displays the Content Manager **New Record** dialog

   > **NOTE:** If you selected the export connector setup option Automatically Invoke Record Creation, the dialog appears before the document closes, without having to click the button on the panel.

   The integration automatically sends the field values in index fields with a CM_ type to the corresponding field on the Content Manager record, including those fields that are not appearing on the Record Creation dialog.

   You can add or modify the values on the form using all of Content Manager's standard search and lookup features.

2. To confirm the details and create the record within Content Manager, click **OK**.

   After the record has been created, the integration saves the record identifier on the Kofax Capture document and it appears in the **Record Number** field in the Content Manager control panel.

   The integration also updates the **CM_** type document index fields that were modified in the **Content Manager New Record** dialog.

   > **NOTE:** Limitation - the Content Manager control panel may appear even when not using the Content Manager export connector. Kofax Capture writes some registry keys when using an export connector, and does not remove them when using another export connector.

Export

This section describes the export phase and module, which is part of the Kofax Capture product and is not specific to this export connector.

To execute the export connector:

1. On your computer, click **Start** and in the Kofax Capture program group, click **Export**.

   The **Export** screen appears and shows the progress of the process.

   If an error occurs during export, a document will only ever be exported once.

   Re-processing a batch after quality control does not result in duplicate documents or batches.

The Content Manager export connector processes the batch by attaching the exported document image files to the records created during the validation or verification stage.

Configuration for barcode recognition

Many organizations distribute their mail directly to the recipients, without routing it through the scanning room first.

In this case, the recipients should be able to register their mail in Content Manager, print out a label or cover sheet for their document and then hand it over to the scanning room later.

These scanning operators do not have to create records in Content Manager any more, but merely assign their images to the existing records.

The Content Manager export connector makes this process easy; it recognizes record barcodes.

This section describes the configuration of the export connector for this type of operation.

Export setup steps

You can use the **Content Manager Setup Script** dialog to configure the export connector to never present the scanning staff with a Content Manager New Record form when all barcodes are valid Content Manager records.

1. See Export setup on how to show the dialog

2. Select the Content Manager dataset and default Record Type

3. Select the options:
   - **General - Automatically invoke Record creation**

   - **Queues – Validation**

   - An option under **Records Policy**

   - An image type in the **Document Type** tab

Export setup steps

Delete this text and replace it with your own content.

Index field setup

The Content Manager barcode must be scanned to an index field on the document class called **CM_ Internal Barcode**.

This field must be of the type **CM_Internal Barcode**. The index field and field type are part of the sample Content Manager batch class import.

To create the field type manually, make it a field of the type **VARCHAR** with a length of 10 characters.

The **CM_Internal Barcode** field is the only field that you need to configure in addition to the fields **CM_RecordUri** and **CM_RecordId** because the record's metadata has already been created by the mail recipient.

Configuring the barcode area as an indexing zone

For Kofax Capture to read the barcode into the **CM_Internal Barcode** indexing field, you need to set up an indexing zone:

1. Create a sample page by right-clicking the form type and clicking **Add Sample Pages**

2. Select a **.tif** file to be the basis of the page, click **OK**

3. Select the sample page you have created and click **Create Index Zone** in the toolbar at the top

4. In the page area, click and drag to select the area where the barcodes are attached to the documents or located on the cover sheet

   The **Create Index Zone** dialog appears.

5. In **Associated field**, select **CM_Internal Barcode**

6. Select **Auto recognition** and in **Recognition profiles**, select **Kofax 3 of 9 Bar** Code and click **OK**

7. Right-click your batch class, click **Properties** and in the **Queues** tab and make sure that **Recognition Server** is in the list **Selected Queues** on the right

8. Publish your batch class

Executing the record barcode recognition script

The above configuration reads the barcode in the indexing zone during the recognition queue execution and transfers the value of the barcode as text to the Internal Barcode field in Content Manager.

At validation time, the Content Manager export connector recognizes the presence of the Internal Barcode field and, rather than presenting a New Record form, it searches for the record with the same barcode.

If it finds the record, it stores its URI and record ID so that it can export the image against that record.

If it does not find a record with that barcode, it displays a message and then provides the operator with a Content Manager New Record form.

It is a good idea to display the barcode field to the operator so that they can check that Content Manager has recognized a valid code, i.e. an R followed by nine digits and the database identifier.

To make the process even easier, the Content Manager barcodes could be printed with the code in plain text below the barcode.

Technical support

Kofax Capture resellers are responsible for providing first level technical support directly to their customers.

To obtain technical support for the export connector or to report software errors, please contact your Kofax Capture Reseller (ACR).

Prior to contacting support, please ensure you have completed the following steps:

- You have read this document
- You have installed and set up Content Manager
- You have installed and set up Kofax Capture
- You have installed and set up the Content Manager export connector
- You have recorded and trapped all error messages in the Kofax Capture error log

Feature requests

This export connector has been designed to meet the majority of customer requirements.

Feature requests should be sent to Kofax through your Kofax Capture reseller.