Capture

Capture Installation Guide

Release 5.0

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About This Manual

The *FileNet Capture Installation Guide* describes procedures for installing the Capture Desktop and Capture Professional software, version 5.0. This manual also provides guidelines for configuring the FileNet system to work with Capture Desktop or Capture Professional.

Note If you are upgrading or converting a workstation from an earlier release of Capture, refer to for specific instructions.

This manual makes the following assumptions:

- You are familiar with general PC operations and basic Windows commands.

- You are familiar with configuring and installing peripheral components if you are performing your own hardware integration.

Manual Content

This manual includes the following information:

- Hardware and software requirements for the workstation.

- FileNet system and network compatibility for Capture Desktop and Capture Professional.

- An overview of required hardware and software installation procedures you must perform before installing Capture Desktop or Capture Professional on a workstation.

- A procedure for configuring the Content Services software to work with the Capture workstation.

- A procedure for configuring the Content Engine software to work with the Capture workstation.

- A procedure for configuring the Image Services server software to work with the Capture Professional workstation.

- Procedures for installing Capture Desktop and Capture Professional software for scanning and non-scanning workstations.

- A procedure for silent install of Capture Desktop and Capture Professional software.

For information on installing Capture on a workstation where a previous release of Capture has already been installed, refer to for specific instructions.

Release Notes and Documentation Updates

The Release Notes contain important information about the current release of Capture not included in this manual or in the online help and can be found on the FileNet website **http://www.css.filenet.com**.

Related Documentation

This section lists other documentation to refer to when installing and using your Capture workstation.

Refer to the Getting Started Technical Notes (*Capture Desktop Getting Started Guide* and the *Capture Professional Getting Started Guide*) for a brief tutorial on your Capture product.

Refer to the *Capture Administrator's Guide* for instructions on how to select components for each of the Capture Professional workstations in your facility, and other system-wide configuration suggestions.

For information about FileNet Image Services software, refer to the *Image Services System Administrator's Handbook*, and *Image Services System Administrator's Companion.*

For information about FileNet Content Services software (formerly called IDMDS or IDM Document Services), refer to the appropriate *Content Services Installation Guide.*

For information about FileNet Content Engine software, refer to the *FileNet P8 Installation and Upgrade Guide*.

A complete online help system is also provided for each product.

Note   You can display the software release version and patch level from the application software About box. To display the About box, select the Help option from the main menu, then click About.

FileNet Training

FileNet provides various forms of instruction. Please visit the Global Learning Services in FileNet's Customer Center area at www.filenet.com.

Comments and Suggestions

FileNet invites all customers to communicate with the Documentation group on any question or comment related to FileNet manuals and online help. Send email to docs@filenet.com. We will make every effort to respond within one week. Your suggestions help us improve the products we deliver.

1
Requirements

This chapter details the workstation requirements for Capture Desktop and Capture Professional. In some cases, both a minimum and a recommended requirement are provided. Use the recommended requirement for best performance.

Both Capture Desktop and Capture Professional systems can have two types of workstations – a scanning workstation and a non-scanning workstation.

- A scanning workstation typically consists of a computer and a scanner attached through a scanner-interface controller. These workstations may also include the File Import component to bring files into the system for processing. An optional Doc Processing package is available for features such as image enhancement and bar code recognition.

- A non-scanning workstation is typically used to perform functions such as image verification, document assembly, indexing and committal. Non-scanning workstations may also use the optional Doc Processing package for image enhancement and other processing features.

Capture Desktop workstations may be connected to a FileNet Content Services (CS) library or a FileNet Content Engine (CE) library. The workstations may also share access to a Shared Content Services

or Shared Content Engine library with other workstations, permitting distributed processing.

Capture Professional workstations may be connected to an Image Services (IS) library, a Content Engine library, or a Content Services library, and may also communicate with other workstations in a distributed processing environment. Capture Professional allows multiple workstations to access the images and allows the system administrator to distribute processing in a way that works best for a particular operation. For more information on how to customize the installation for your facility, refer to the *Capture Administrator's Guide*.

Workstation Requirements

Hardware Requirements

System Requirements

Following are the minimum hardware requirements for a Capture workstation:

- 1GHz Pentium computer (minimum)
  2GHz Pentium computer, or higher, recommended

- 512 MB memory (minimum), 1G memory recommended. Additional memory may be required for processing color JPEG images or large batches

Note   Current customers upgrading to Capture 5.0 are not required to purchase new hardware to meet these guidelines. However, hardware upgrades may be required for performance issues.

- CD drive for installation media

- 16-bit color mode (minimum) and a graphics monitor with minimum resolution of 1024 x 768 pixels

In addition, scan workstations require a scanner and compatible scanner interface card (see "Scanner Requirements" on page 19 for specific information).

Note   As of the Capture 4.0 GA release, Kofax hardware and the optional software Doc Processing package (also from Kofax) are only supported on single-processor computers. Performance or functionality issues that occur if a Kofax board is used on a dual-processor system may only be addressed if they can be reproduced on a single-processor configuration. Refer also to the updated Capture Release Notes posted on www.filenet.com and to information from Kofax at www.kofax.com for updates to this requirement.

Approximate Disk Space Usage Requirements

Disk space requirements will vary depending on the options selected and scanner package installed. Also, the values below do not include storage requirements for images and configuration objects stored locally on the workstation.

Software	Disk Space Usage (approximate)
Capture Desktop	240 MB
Capture Professional, Scan	260 MB
Capture Professional, Fax Entry	190 MB
Capture Professional, File Import	190 MB
Optional Software Doc Processing	20 MB

Operating System Requirements

Capture workstations require one of the following:

- Windows 2000 with Service Pack 2 (or later) installed.

- Windows XP Professional.

Additional Software Requirements

Internet Explorer

Capture requires a minimal installation of Internet Explorer 6.0 or later.

SQL Server - Client Software

Shared repositories and the shared statistics database require SQL Server 2000 with Service Pack 2 or later.

Oracle Server - Client Software

Shared repositories and the shared statistics database require Oracle 9i Release 2 or later.

IDM Desktop Requirements for Capture Workstations

You can Install IDM Desktop 3.3 or later and configure your libraries or repositories before or after installing Capture. To install IDM Desktop and configure your libraries, refer to the *IDM Desktop Administrator's Help* and *IDM Desktop Help*. Be sure to restart your workstation immediately after installing IDM Desktop. See also for more information.

Note   You can install IDM desktop at any time. However, if you are connecting to an IS or CS repository, you must install IDM desktop before configuring Capture Manager.

Content Services Requirements for Capture Workstations

If your Capture Workstation is connected to a Content Services server, you must use the correct version of IDM Desktop to access the CS repositories.

Refer to the IDM Desktop documentation and release notes for information on supported releases. Refer to the information posted in the Capture Compatibility and Dependency section of the FileNet CSS Web site for the latest updates.

Before you install Capture, your Content Services system administrator should make sure that all necessary upgrades and patches have been installed to accommodate the Capture software. Note that Capture requirements may be superseded by IDM Desktop requirements.

Content Engine Requirements for Capture Workstations

To be used with Capture workstations, your Content Engine server must be running Content Engine 3.0 or later.

Refer to the FileNet P8 documentation and release notes for additional information on supported releases.

Before you install Capture, your Content Engine system administrator should make sure that all necessary upgrades and patches have been installed to accommodate the Capture software.

Records Manager Requirements for Capture Workstations

Capture Professional supports Records Manager release 3.5 or later.

Image Services Requirements for Capture Professional Workstations

Professional only

To be used with a Capture Professional workstation, your Image Services server must be running the Image Services release required by IDM Desktop.

Refer to the IDM Desktop documentation and release notes for information on supported releases. Refer to the information posted in the Capture Compatibility and Dependency section of the FileNet CSS Web site for the latest updates.

Before you install Capture Professional, your Image Services system administrator should make sure that all necessary upgrades and patches have been installed to accommodate the Capture software.

Scanner Requirements

Capture communicates with the scanner through software toolkits from Pixel Translations or Kofax Image Products. These toolkits, in turn, require specific scanner interface cards and scanner drivers. Support for a specific scanner depends upon the precise combination of toolkit, driver, and interface card used, as follows:

Support through Pixel Translations (ISIS) Drivers

The Pixel Translations toolkit requires ISIS drivers and SCSI interface cards. Pixel Translations currently tests their software with the following SCSI cards from Adaptec:

- AHA-2930, AHA-2940, and AHA-29160. These require a PCI bus slot in the scan station. Note that there are several different models in the 2930 and 2940 families (Ultra, U2, U2W, etc.), and that you should consult with your scanner vendor for specific recommendations.

The above list is subject to change, as is the list of scanners supported with the above cards. Refer to the Pixel Translations web site at www.pixtran.com and to the Adaptec web site at www.adaptec.com for updates and additional information. Contact your scanner vendor for updates to the scanner driver. Capture 5.0 is compatible with any ISIS driver that is based on the Pixel Translations ISIS 7.0 toolkit.

Support through Kofax Image Products Interface Cards

Note	Kofax assumes that users will log on to scan stations as Administrators. Scan users without Administrator rights may be restricted from making changes to the workstation configuration. Kofax requires Administrator rights to use VRS.

Capture is currently compatible with the following interface cards from Kofax: Adrenaline cards, including the 450, 650, 650i, 850 and 1700 families. These require a PCI bus slot in the scan station. These cards are available with either SCSI connections (e.g., 450, 650, 650i, 850S and 1700S) or video connections (850V and 1700V).

Kofax provides a runtime toolkit for the Adrenaline cards.

Note	The optional Doc Processing package cannot be installed on a system with a Kofax Virtual ReScan (VRS) scanner.

Support for TWAIN-compliant devices

TWAIN-compliant devices are supported on Windows 2000 only.

Note	If your scanner has both a TWAIN and an ISIS driver, use the ISIS driver. FileNet supports ISIS drivers when both are available.

Support Considerations

FileNet will endeavor to resolve software issues with its application software, Capture Professional and Capture Desktop, when used with

either the Pixel ISIS SCSI scanner driver software or the Kofax Adrenaline scanner driver software.

Support for scanner hardware, computer interface boards, and the scanner driver software is the responsibility of the manufacturers or developers of those items, not FileNet. FileNet is responsible for its application software products only.

2
Workstation Setup

Before you install the Capture software, set up your workstation using the procedures in this chapter. After you have set up the workstation, refer to the following chapter to configure your library (repository) if necessary:

- Chapter 3, "Configuring your Server for Capture," on page 30

After you complete all workstation setup requirements, you may want to install IDM Desktop for IS and CS libraries, as directed in the following chapter:

- Chapter 4, "Installing IDM Desktop," on page 46

To install the Capture software, refer to one of the following chapters:

- Chapter 5, "Installing Software for Capture Desktop Workstations," on page 49

- Chapter 6, "Installing Software for Capture Professional Scanning Workstations," on page 86

- Chapter 7, "Installing Software for Capture Professional Non-Scanning Workstations," on page 120

What You Need to Know

This chapter provides worksheets you can use to record configuration information for each workstation.

- For workstations connected to Content Services libraries, see the "Content Services Workstation Configuration Worksheet" on page 24.

- For workstations connected to Content Engine libraries, see the "Content Engine Workstation Configuration Worksheet" on page 25

- For workstations connected to Image Services libraries, see the "Image Services Workstation Configuration Worksheet" on page 26.

Before you begin the installation process, record the information for your workstation on the appropriate worksheet. You must have library information for each Content Services library you want to configure.

Content Services Configuration Worksheet

Use this worksheet to record information about the workstation, the Content Services server or library, the scanner and scanner controller configuration.

Content Services Workstation Configuration Worksheet

Windows Administrator Login name and password	
Scanner manufacturer	
Scanner model number	
Scanner interface controller type	
CD Key (xxx-xxxxxxx)	
Folder for Capture file installation	
For each Content Services library, you will need the following (note that the Host Machine and the Name of Host Machine need not be the same, and Content Services names are case sensitive):	
Default Library Name	
Name of Host Machine	
Host Machine	
Database Type	
User login name and password for each library you will log on to	
For Shared: Data Source Name (DSN)	
SQL Server Name	
(SQL) Data Base Name	
(SQL) Data Base Login	
Oracle TNS Server Name	
(Oracle) Data Base Name	
(Oracle) Data Base Login	

Content Engine Configuration Worksheet

Use this worksheet to record information about the workstation, the Content Engine server or library, the scanner and scanner controller configuration.

Content Engine Workstation Configuration Worksheet

Windows Administrator Login name and password	
Scanner manufacturer	
Scanner model number	
Scanner interface controller type	
CD Key (xxx-xxxxxxx)	
Folder for Capture file installation	
For Content Engine systems, you will need the following from your CE administrator:	
Content Engine Domain name	
Content Engine Domain Login to add workstation to the domain	
Default Library Name (Object Store) for each CE library	
For Shared systems: Data Source Name (DSN)	
SQL Server Name	
(SQL) Data Base Name	
(SQL) Data Base Login	
Oracle TNS Server Name	
(Oracle) Data Base Name	
(Oracle) Data Base Login	

Image Services Configuration Worksheet

Use this worksheet to record configuration information about the workstation, Image Services server, scanner and scanner controller before you install software.

Image Services Workstation Configuration Worksheet

Windows Administrator Login name and password	
Scanner manufacturer	
Scanner model number	
CD Key (xxx-xxxxxxx)	
Scanner interface controller type	
Folder for Capture file installation	
Domain and organization names for the Image Services server (note that domain and organization names are case sensitive)	
Default Batch Service, if applicable (Bes, Bes1, Bes2, etc.)	
Login name	
Password	
For Offline or Shared Offline: Data Source Name (DSN)	
SQL Server Name	
(SQL) Data Base Name	
(SQL) Data Base Login	
Oracle TNS Server Name	
(Oracle) Data Base Name	
(Oracle) Data Base Login	

Workstation Setup Checklist

Perform the installation procedures in the sequence shown. When indicated, verify the installation was successful by performing the test described at the end of the procedure.

1 Ensure that the workstation meets the minimum hardware requirements listed in "Workstation Requirements" on page 14. Install all PC hardware according to the manufacturer's instructions.

2 Complete a "Content Services Workstation Configuration Worksheet" on page 24, a "Content Engine Workstation Configuration Worksheet" on page 25, and/or an "Image Services Workstation Configuration Worksheet" on page 26 for each workstation.

3 Before installing Windows, install your network interface card in the workstation PC and connect the card to the network cabling. The Windows software will install the appropriate driver for the card.

4 Install and test Windows according to the Windows documentation.

5 Verify that the PC boots correctly, Windows runs properly, and there are no device conflicts (evidenced by an error or warning messages at boot time). Remedy all device conflicts before proceeding.

6 Power off the computer, and then install the scanner interface card in the computer. (This step is not required for Capture Professional non-scanning workstations unless you are using a hardware accelerator for Document Processing functions.) Refer to the manufacturer's literature for information on board handling precautions, and switch and jumper setting instructions. Make a note of the settings selected for switches and jumpers.

Note Your computer may automatically assign an I/O address and IRQ for plug-and-play boards. You will not need to configure hardware for these boards. If, however, your workstation does not automatically detect the board, you must install supporting software and configure the board manually.

7 Install the SCSI driver software or your board manufacturer's software for your interface card.

Note If you are using a Kofax board, you must install current Kofax toolkit hardware runtime files. Runtime files are available from the Kofax website www.kofax.com.

8 If you received a hardware key with your Advanced Doc Processing package, install it now.

9 Contact your Content Services, Content Engine, or Image Services system administrator to request any needed configuration changes on the server. See Chapter 3, "Configuring your Server for Capture," on page 30.

10 Install IDM Desktop on the workstation before you install Capture. For more information see Chapter 4, "Installing IDM Desktop," on page 46.

11 For CE libraries, join the workstation to the domain of the Active Directory and establish CE client connectivity. For more information, see "Installing Content Engine" on page 32.

12 After you have completed the workstation and server setup, proceed to the appropriate installation chapter for the workstation:

- To install a Capture Desktop workstation, go to Chapter 5, "Installing Software for Capture Desktop Workstations," on page 49.

- To install a Capture Professional scanning workstation, go to Chapter 6, "Installing Software for Capture Professional Scanning Workstations," on page 86.

- To install a Capture Professional non-scanning workstation, go to Chapter 7, "Installing Software for Capture Professional Non-Scanning Workstations," on page 120.

13 If you are installing an optional third-party fax package, install Capture first, then install the fax application, following the third-party instructions.

Installation Notes for Kofax Controller Cards

Kofax Source Manager (KSM)

When you install a Kofax board, you must enter a source name in the Configured Source field as you configure the Kofax Source Manager (KSM). After you install Capture, when you select a scanner, select the source name you configured.

Kofax Hardware Runtime Files

When you install a Kofax board, you must install current Kofax toolkit hardware runtime files. Runtime files are available from the Kofax website at www.kofax.com.

Note If you are upgrading from a previous version of Capture, you may need to update the runtime files to a newer version.

3

Configuring your Server for Capture

Before you install the Capture software, you must ensure that your repository or server (library) is configured properly.

If you are connecting to a Content Services library, see "Installing Content Services" on page 31.

If you are connecting to a Content Engine library, see "Installing Content Engine" on page 32.

If you are connecting to a Image Services repository, see "Installing Image Services for Capture Professional" on page 34.

If you are connecting to a Shared repository, you must install the appropriate Relational Database Management Software (RDBMS) Server, and create a database and a Data Set Name (DSN) for each shared repository. See "Configuring SQL Server for Shared Repositories" on page 38 or "Configuring Oracle Server for Shared Repositories" on page 42.

Installing Content Services

If you have not yet installed your Content Services software, do so before proceeding with the IDM Desktop and Capture installations. Configure the Content Services software on the server (library) to which Capture connects, and make sure that it is working properly before proceeding.

See "Content Services Requirements for Capture Workstations" on page 17, as well as the release notes for specific version and service pack requirements.

When using Capture Professional, you must create a document class on the Content Services library called "Indexless." Security must not restrict access to the Indexless document class.

When you have finished installing and configuring the Content Services library, continue with Chapter 4, "Installing IDM Desktop," on page 46 to install IDM Desktop on your workstation**.**

Installing Content Engine

If you have not yet installed your Content Engine software, do so before proceeding with Capture installations. Configure the Content Engine software on the server (library) to which Capture connects, and make sure that it is working properly before proceeding.

See "Content Engine Requirements for Capture Workstations" on page 18, as well as the release notes for specific version and service pack requirements. Refer to the *FileNet P8 Installation Guide* to install Content Engine.

To install the Content Engine software you must join an active directory domain and establish Content Engine client connectivity. These two steps are discussed below.

Join Active Directory Domain

Before you install Capture, each workstation must join the domain of the Active Directory.

1 Select Settings/Control Panel from the Windows Start menu.

2 Select System to display the System Properties dialog box.

3 Select the Network Identification tab on Windows 2000 systems, or the Computer Name tab on XP systems.

4 Click the **Properties** button on Windows 2000 systems, or the **Change** button on XP systems.

5 Under the **Member of** section, select the **Domain** radio button and enter the CE server domain name. Click **OK**. The system display a user name and password prompt.

6   Enter the domain user name and password and click **OK**. The system displays a acknowledgement, and then a reminder to restart the computer. Click **OK** to clear each message, but leave the System Properties dialog box displayed.

7   Do not restart the computer. Select Settings/Control Panel from the Start menu, then select Users and Passwords on Windows 2000 systems, or User Accounts on XP systems.

8   Click **Add** to display the Add New Users dialog box.

9   Enter the CE user name and domain name you used in steps 6 and 5. Click **Next**.

10   Select the **Other** radio button and Administrators from the list. Click **FInish**.

11   Click **OK** twice and then click **Yes** to restart the computer.

Establishing Content Engine Client Connectivity

After you have connected the capture station to the Windows domain, complete the following steps.

1   Install the P8 Content Engine Client Connectivity modules from the P8 Content Engine software CD by selecting the custom installation option. The version of the Content Engine client modules must match that of the Content Engine Server.

2   When prompted for the P8 domain, enter the name of the P8 domain associated with the Content Engine. The setup procedure may reboot.

3   Apply the latest Content Engine patches. The version of the patches must match that of the Content Engine Server.

Note   For a list of which Content Engine versions are supported by Capture 5.0, see the FileNet Capture-Print-Fax Products dependency matrix on the FileNet CSS website **http://www.css.filenet.com**.

Installing Image Services for Capture Professional

If you have not yet installed your Image Services server, do so before proceeding with the IDM Desktop and Capture installations. Configure the Image Services software on the server to which Capture Professional connects, and make sure that it is working properly before proceeding. A checklist for setting up a FileNet system is available in the Introduction chapter of the *System Administrator's Handbook*, under "New FileNet System Setup."

See "Image Services Requirements for Capture Professional Workstations" on page 18, as well as the release notes for specific version and service pack requirements. Refer to the *Image Services (IDMIS) Installation Guide* and *Administrator's Guide* to install Image Services.

After you configure your Image Services software for Capture Professional, refer to Chapter 4, "Installing IDM Desktop," on page 46.

Configuring an Existing Image Services Server for Capture

When using Capture Professional with an existing Image Services server (library), you must create a document class on the Image Services server called "Indexless." Security must not restrict access to the Indexless document class.

Capture Professional automatically creates, installs and populates the Config folder in BES (used by Capture Professional to store configuration files) on the Image Services server. For more information on the Config folder, see Chapter 3, "Making a Backup Copy of the Image Services Config Folder," on page 37.

Configuring a New Image Services Server for Capture

Once the server is operational, prepare it for use with Capture Professional as follows:

- Create document classes for use with Capture Professional using the Database Maintenance application. A document class with the name of "Indexless" is required as a minimum. ("Indexless" must be spelled and capitalized exactly as shown.) Security must not restrict access to the Indexless document class.

- Create indexes

Setting up document classes and indexes is described in the "Database Maintenance" chapter of the *System Administrator's Handbook*.

Using an Image Services Server on a Different Subnet

If you will be accessing an Image Services server on a subnet that is different from the one your workstation is on, add an entry like the following to the hosts or lmhosts file:

xxx.xxx.xxx.xxx <domain> <domain>-<organization>-nch-server

Where:

xxx.xxx.xxx.xxx is the IP address of the Image Services server

domain is the Image Services server domain name

organization is the organization name selected for the Image Services server during the initial installation. (Typically the organization is filenet.)

For example, your entry might look like this:

10.1.20.123 mysystem mysystem-filenet-nch-server

Note that domain names are limited to lowercase and alphanumeric characters.

For more information on Image Services access, contact your Image Services System Administrator.

Making a Backup Copy of the Image Services Config Folder

If you have installed Capture Professional and created or modified the configuration content in the Config folder on the server, performing certain maintenance procedures on the server (such as the bes_clean utility) will delete everything in the Config folder. If you want to keep your configuration, back up your BES Config folder to your local repository before executing the server maintenance utility. For example, the bes_clean utility deletes everything in BES Cache, including all Setting, Template and Capture Path objects and files in the Config folder. After completing the server maintenance, copy the files and objects that you saved in the local repository back to the Config folder.

Refer to the procedure titled "Backing Up the BES Config Folder on the Remote Repository" in the *Capture Administration Guide* for details.

Configuring SQL Server for Shared Repositories

If you have not yet installed your Microsoft SQL Server, do so before proceeding with the IDM Desktop and Capture installations. Create a database for each shared repository.

Creating a Data Source Name for a Shared Repository

You must create a Data Source Name (DSN) to the appropriate SQL Server database on each workstation that will use the shared repository.

1 Start the Microsoft ODBC Administrator tool. (ODBCAD32.exe).

2 Select the System tab.

3 Click the **Add** button.

4 From the list of available ODBC database drivers, select **SQL Server**.

Note If SQL Server does not appear on the list, cancel out of the Administrator and install the necessary SQL Server Client Libraries on the workstation.

5 Click the **Finish** button to start the New Data Source wizard.

6 On the first screen of the wizard, enter the DSN string you want to use in the **Name** field, and the name of the PC running SQL Server in the **Server** field. Select how SQL Server should verify authenticity (Windows NT or SQL Server login). Click **Next**.

7 On the second screen of the wizard, select the appropriate authentication method and click the **Client Configuration** button.

8 Verify the following settings:

Server Alias: the name of the PC running SQL Server

Network libraries: select TCP/IP

Server Name: the same as **Server Alias**

Assure that the **Dynamically determine port** check box is selected.

Click **OK**.

9 Select the **Connect to SQL Server to obtain...** check box.

Enter the account name in the **Login ID** field.

Enter the password set up by your SQL system administrator in the **Password** field.

Click **Next**.

Note If you are using Windows NT authentication, these fields will be greyed out and you need not enter the information.

10 On the third screen of the wizard, select **Change the default...** and choose the database created for the shared repository from the list.

Select **Use ANSI quoted...**

Select **Use ANSI nulls.**..

Click **Next**.

11 On the fourth screen of the wizard, select **Perform translation...** and click the **Finish** button.

12   On the fifth screen of the wizard, click the **Test Data Source** button. If the system does not display a message that tests have completed successfully, repeat the procedure.

13   Verify that the new DSN is now listed on the System DSN tab.

Configuring SQL Server for Shared Statistics Database

If you have not yet installed your Microsoft SQL Server, do so before proceeding with the IDM Desktop and Capture installations. Create a database for the shared statistics database.

Creating a Data Source Name for the Shared Statistics Database

You must create a Data Source Name (DSN) to the appropriate SQL Server database on each workstation that will use the shared statistics database.

1   Start the Microsoft ODBC Administrator tool. (ODBCAD32.exe).

2   Select the System tab.

3   Click the **Add** button.

4   From the list of available ODBC database drivers, select SQL Server.

Note   If SQL Server does not appear on the list, cancel out of the Administrator and install the necessary SQL Server Client Libraries on the workstation.

5   Click the **Finish** button to start the New Data Source wizard.

6   On the first screen of the wizard, enter the DSN string you want to use in the **Name** field, and the name of the PC running SQL Server in the **Server** field. Select how SQL Server should verify authenticity (Windows NT or SQL Server login). Click **Next**.

7   On the second screen of the wizard, select the appropriate authentication method and click the **Client Configuration** button.

8   Verify the following settings:

    Server Alias: the name of the PC running SQL Server

    Network libraries: select TCP/IP

    Server Name: the same as **Server Alias**

    Assure that the **Dynamically determine port** check box is selected.

    Click **OK**.

9   Select the **Connect to SQL Server to obtain...** check box.

    Enter the account name in the **Login ID** field.

    Enter the password set up by your SQL system administrator in the **Password** field.

    Click **Next**.

Note   If you are using Windows NT authentication, these fields will be greyed out and you need not enter the information.

10   On the third screen of the wizard, select **Change the default...** and choose the database created for the shared repository from the list.

Select **Use ANSI quoted...**

Select **Use ANSI nulls..**...

Click **Next**.

11 On the fourth screen of the wizard, select **Perform translation...** and click the **Finish** button.

12 On the fifth screen of the wizard, click the **Test Data Source** button. If the system does not display a message that tests have completed successfully, repeat the procedure.

13 Verify that the new DSN is now listed on the System DSN tab.

14 After you have installed IDM Desktop and Capture Professional, start Capture Manager and click the **Statistics** button to display the Statistics Control dialog box. Ensure the **Enable Statistics** check box is selected and click **OK**.

15 Close Capture Manager and start Capture Professional. Select Report Setup from the File menu. Select the Database Tab. Enter the Data Source Name of the statistics database in the **DSN** field. (You can find the Data Source Name in the Name field of the Microsoft SQL Server DSN Configuration dialog box.) If you are using SQL authentication, enter the SQL User ID and Password. Click **OK**.

Configuring Oracle Server for Shared Repositories

Ensure that the Oracle Server software is installed.

On each workstation, install the Oracle 9i Client software (including the Oracle Windows Interfaces) along with the following patches:

- OUI Patch 2878462

- OLEDB Patch 3262468 (this patch must include ODBC driver 9.2.00.54)

Complete these Oracle installation steps before proceeding with the IDM Desktop and Capture installations. In the following section, you create a database for each shared repository.

Creating a Data Source Name for a Shared Repository

You must create a Data Source Name (DSN) to the appropriate Oracle Server database on each workstation that will use the shared repository.

1   Start the Microsoft ODBC Administrator tool. (ODBCAD32.exe).

2   Select the System DSN tab.

3   Click the **Add** button.

4   From the list of available ODBC database drivers, select **Oracle Server**.

Note   If the Oracle Server does not appear on the list, then the Oracle Client installation has not been configured correctly.

5   Click the **Finish** button to start the New Data Source wizard.

6   On the first screen of the wizard, enter the DSN string you want to use in the **Data Source Name**. Select the **TNS Service Name** and enter a **User ID**.

> **Note**   If the **TNS Service Name** does not appear on the list, then the client listener piece of the Oracle Client installation has not been configured correctly.

Click **OK**.

7   Click **Test Connection**. The Oracle ODBC Driver Connect dialog appears. Enter the password and click **OK** to test the connection. If this connection fails, verify the user information on the Oracle server first. If this is correct, verify the Client Oracle Listener piece of the Oracle Client installation.

Configuring Oracle Server for Shared Statistics Database

Ensure that the Oracle Server software is installed.

On each workstation, install the Oracle 9i Client software (including the Oracle Windows Interfaces) along with the following patches:

• OUI Patch 2878462

• OLEDB Patch 3262468 (this patch must include ODBC driver 9.2.00.54)

Complete these Oracle installation steps before proceeding with the IDM Desktop and Capture installations. In the following section, you create a database for the shared statistics database.

Creating a Data Source Name for the Shared Statistics Database

You must create a Data Source Name (DSN) to the appropriate Oracle Server database on each workstation that will use the shared statistics database.

1 Start the Microsoft ODBC Administrator tool. (ODBCAD32.exe).

2 Select the System DSN tab.

3 Click the **Add** button.

4 From the list of available ODBC database drivers, select **Oracle Server**.

Note If the Oracle Server does not appear on the list, then the Oracle Client installation has not been configured correctly.

5 Click the **Finish** button to start the New Data Source wizard.

6 On the first screen of the wizard, enter the DSN string you want to use in the **Data Source Name**. Select the **TNS Service Name** and enter a **User ID**.

Note If the **TNS Service Name** does not appear on the list, then the client listener piece of the Oracle Client installation has not been configured correctly.

Click **OK**.

7 Click **Test Connection**. The Oracle ODBC Driver Connect dialog appears. Enter the password and click **OK** to test the connection. If this connection fails, verify the user information on the Oracle server first. If this is correct, verify the CLient Oracle Listener piece of the Oracle Client installation.

<div align="right">

4

Installing IDM Desktop

</div>

You can install IDM Desktop before or after you install Capture for Content Services and Image Services. This chapter provides information on specific installation options you must select and procedures that you must perform when you are installing IDM Desktop for use with Capture.

For additional information on installing IDM Desktop, refer to *IDM Desktop Administrator's Guide* on the FileNet CSS website www.css.flenet.com.

Installing Upgrades and Patches

Before you install Capture, your IDM Desktop system administrator should verify that all necessary upgrades and patches have been installed to accommodate the Capture software.

Adding Libraries

Once you have installed IDM Desktop, you must use IDM Configure to add your libraries. Refer to the IDM Configure Online Help for more information.

Image Services Libraries

Professional only

Add your Image Services libraries by either entering the domain and organization names for the library, or by importing a configuration file that includes the libraries. Refer to the IDM Desktop online help for additional information.

Content Services Libraries

Add your Content Services libraries by specifying the Library name, System and Host machine names for the library, or by importing a configuration file that includes the libraries. Refer to the IDM Desktop online help for additional information.

Verifying Workstation-to-FileNet System Communication

After installing IDM Desktop and configuring the libraries, establish a connection to the Image Services or Content Services library through IDM Desktop.

Note If you cannot connect to the library, *do not* proceed to the next step. Resolve the connection problem first.

Double-click the FileNet Neighborhood icon on the desktop and verify that you can log on to the library. If you cannot, refer to *IDM Desktop Administrator's Help* and *IDM Desktop Help* to correct your configuration.

Once you have successfully logged on to the library, you should try to retrieve and view a document. If you can do this, then your IDM Desktop installation is successful.

Continue with to install a Capture Desktop workstation.

Continue with to install a Capture Professional scan workstation.

Continue with to install a Capture Professional non-scan workstation.

5

Installing Software for Capture Desktop Workstations

Begin the installation by inserting the Capture CD. If the Capture Setup screen is not displayed on the screen, run Splash.exe.

You can install/uninstall Capture using one of the following methods:

- Normal Capture Installation

- Silent Capture Installation

- Normal Capture Uninstall

- Silent Capture Uninstall

Normal Capture Installation

1   Select **Install Capture (Normal)** from the FileNet Capture Setup screen.

2   The system displays the InstallShield Wizard dialog box as it prepares to install Capture. Click **Next** to advance through the Welcome screen.

FileNet Capture 5.0	✕

Welcome to the InstallShield Wizard for FileNet Capture 5.0

The InstallShield® Wizard will install FileNet Capture 5.0 on your computer. To continue, click Next.

< Back   Next >   Cancel

3   Click **Yes** to agree with the Software License Agreement. A copy of the End User Software License Agreement is also available in "Appendix A – Software License Agreement" on page 157.

```
FileNet Capture 5.0                                              ✕

License Agreement
Please read the following license agreement carefully.              FILENET

Press the PAGE DOWN key to see the rest of the agreement.

┌──────────────────────────────────────────────────────────────┐
│ FileNet Notice to End User - A Software License is Required Prior to Use.  ▲ │
│                                                                            │
│ BEFORE COMPLETING INSTALLATION OR USING THIS SOFTWARE, CAREFULLY           │
│ READ THIS NOTICE.                                                          │
│                                                                            │
│ THIS SOFTWARE IS THE PROPRIETARY INTELLECTUAL PROPERTY OF FILENET          │
│ CORPORATION AND USE OF ANY PORTION OF THE SOFTWARE IS ONLY                 │
│ PERMITTED IF YOU HAVE A VALID WRITTEN LICENSE AGREEMENT WITH               │
│ FILENET.                                                                   │
│                                                                         ▼ │
└──────────────────────────────────────────────────────────────┘

Do you accept all the terms of the preceding License Agreement? If you choose No, the
setup will close.  To install FileNet Capture 5.0, you must accept this agreement.

InstallShield

                              < Back        Yes           No
```

4 Enter the Software License Authorization Key. The Software License Authorization Key determines whether you are installing Capture Desktop or Capture Professional and controls which options are available to you. Authorization keys are attached to the Terms and Conditions Booklet and/or Software License. Click **Next** to continue.

5 Choose the file location to install Capture Desktop.

The default destination folder is shown near the bottom of the screen. Click **Browse** to select a different directory.

Click **Next** to continue.
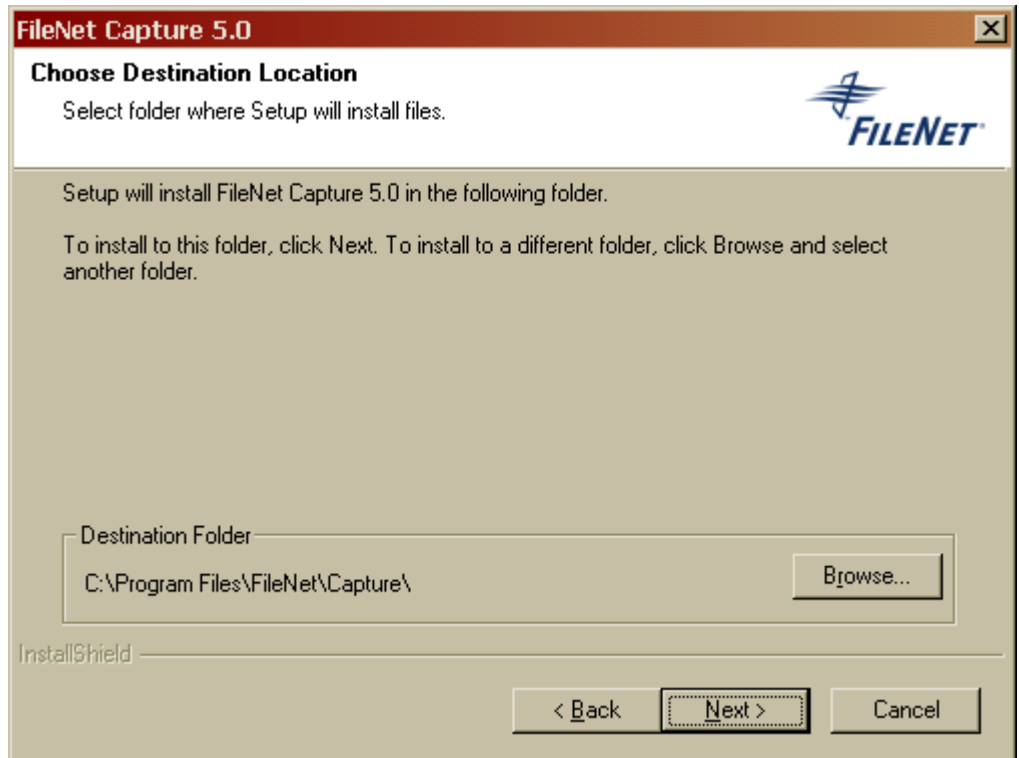
6 Specify the packages you are installing.
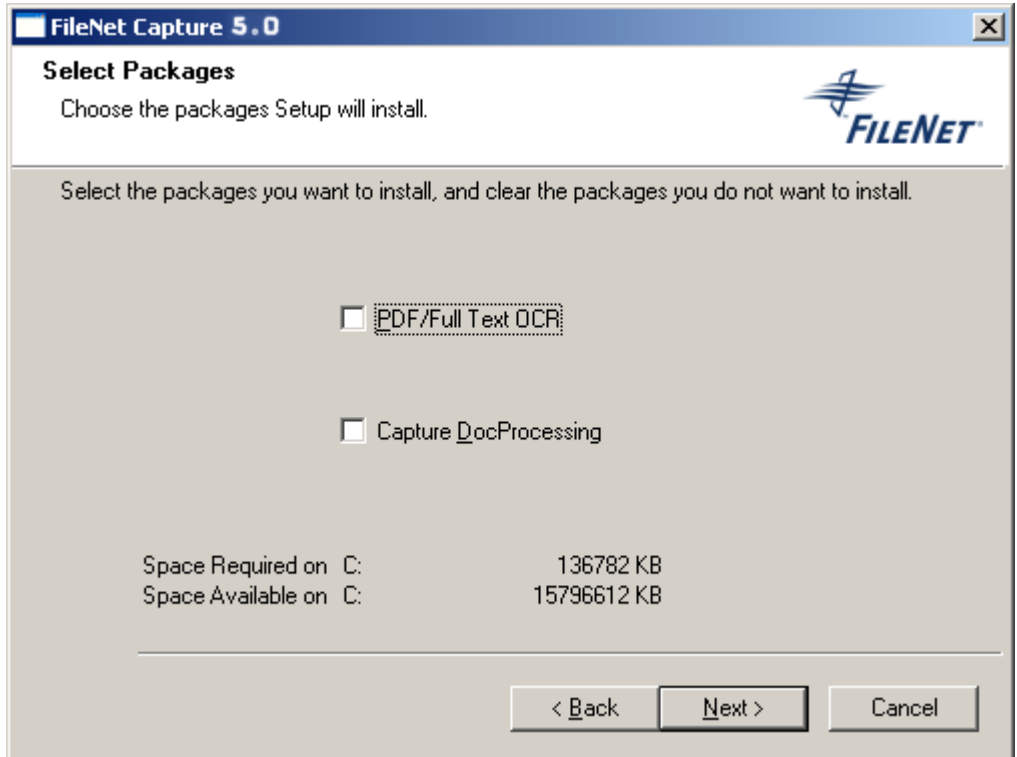
a Select the **PDF/Full Text OCR** check box if you will be installing the optional Full Text OCR package. This package is provided on a separate CD.

b Select the **Capture DocProcessing** check box if you will be installing the optional software Doc Processing package. Software Doc Processing is provided on a separate CD. Y

Note You do not need to select this box if you will be using the Doc Process-ing features provided by a Kofax scanner interface card (hardware Doc Processing).

Click **Next** to continue.

7 On the Start Copying Files screen, review the selections. Use the **Back** button to go back and change selections, if necessary. Click **Next** to continue.
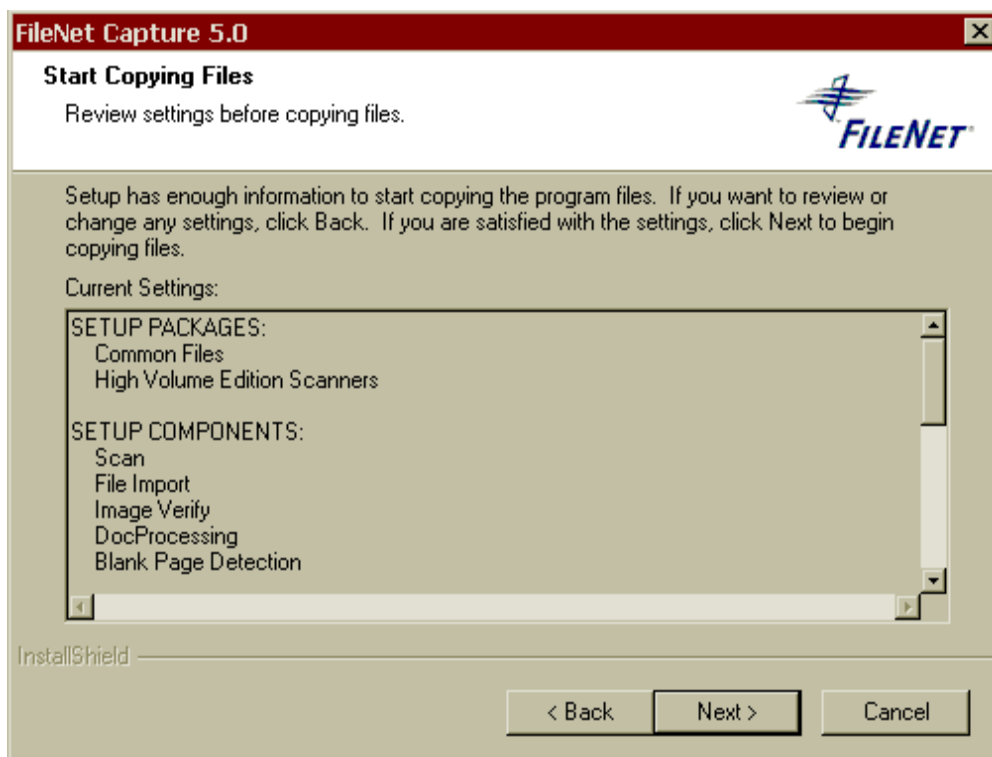
8   The installation program then installs the selected packages on the system. To abort the installation, click **Cancel**.

9   If you are installing the optional Full Text OCR, continue with "Install the Full Text OCR Software" on page 57.

10   If you are installing the optional Document Processing package (and not Full Text OCR), continue with "Install the Doc Processing Software" on page 58.

11   If you did not select any optional installation packages, the Setup Complete screen appears. Click **Finish** to restart your computer manually, or the computer will restart automatically in 15 seconds.

       When the computer restarts and after you log in, the Capture installation process resumes and you may see a number of messages while the installer registers the various components.

       If you have no more options to install, continue with "Configuring Capture Manager" on page 71.

Install the Full Text OCR Software

When prompted, insert the Full Text OCR CD (OCR-2-PDF) to begin the installation.

1   Insert the Full Text OCR CD in your drive and navigate to the drive that contains the CD, using the dialog as necessary. You do not need to specify a folder or file.

Click **OK** after entering the correct drive letter.

The system displays the InstallShield Wizard dialog box and installs Full Text OCR.

2   When the Installation Complete window appears, if you are installing the optional Document Processing package, continue with "Install the Doc Processing Software" on page 58.

If you are not installing Document Processing, continue with the next step.

3   The Setup Complete screen appears. Click **Finish** to restart your computer manually, or the computer will restart automatically in 15 seconds.

When the computer restarts, the Capture installation process resumes and the installer registers the various components.

Continue with "Configuring Capture Manager" on page 71.

Install the Doc Processing Software
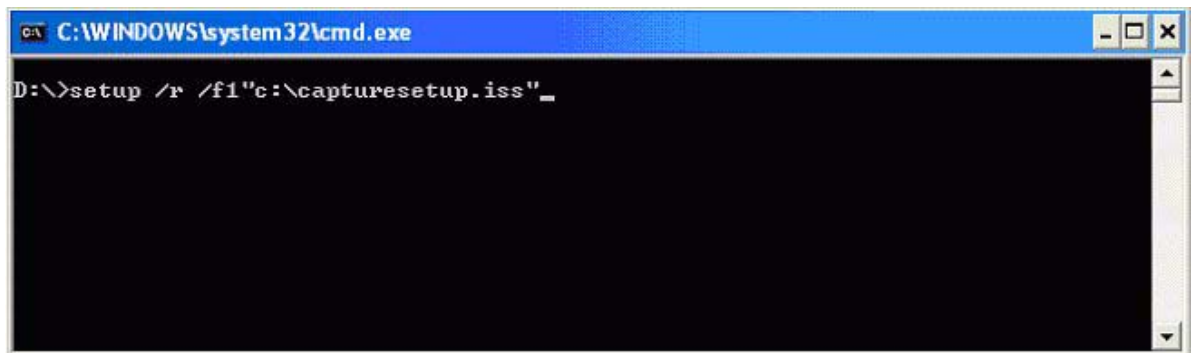
If you selected the option to install Software DocProcessing (also re-
ferred to as the Adrenaline software doc processing) during the installa-
tion process, setup will display this screen:

1 Insert the Kofax Adrenaline CD in your drive and navigate to the drive
that contains the Kofax Adrenaline CD using the dialog as necessary.
You do not need to specify a folder or file.

Click **OK** after you have selected the appropriate drive letter from the di-
alog.

2 The system displays the Kofax Installation Manager screen. Read the instructions and click **Next**.
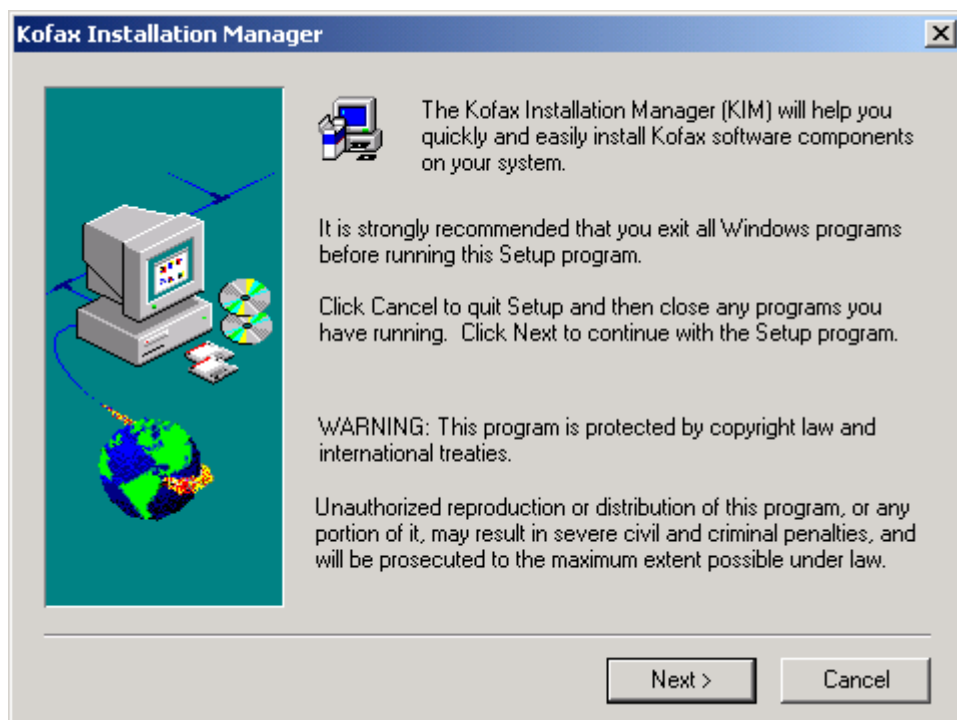
3 Verify that the Adrenaline Image Processing Engine is selected for installation. Use **Browse** to change the installation directory from the default shown, if necessary. Click **Next** to continue.
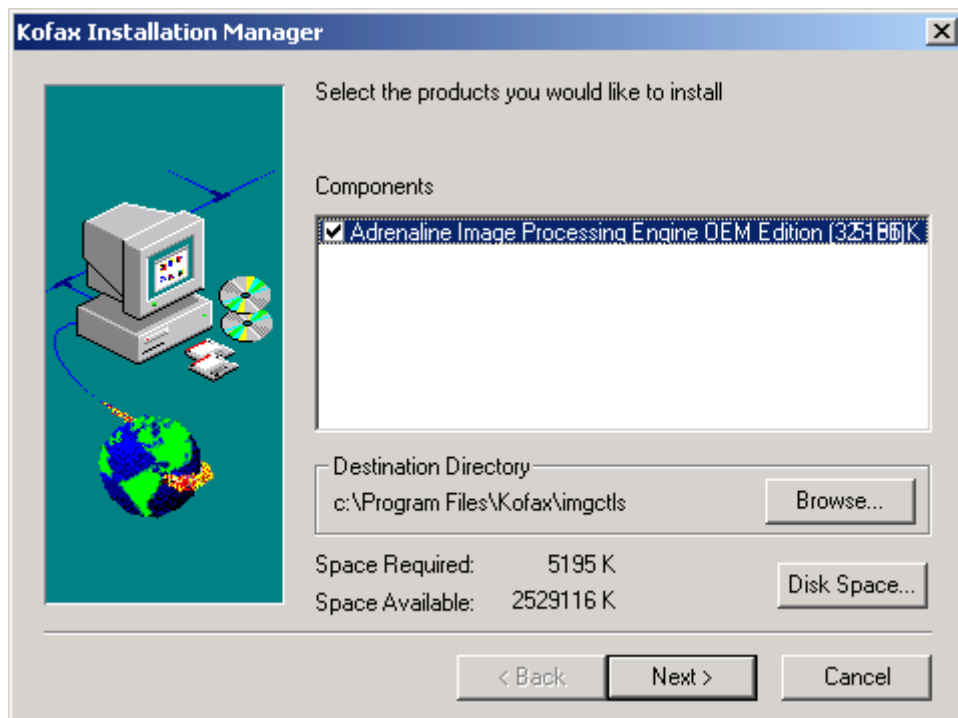
4   You will see a status bar while the installer copies the files to your system. When the files are copied, the system displays the Kofax Installation Manager screen.
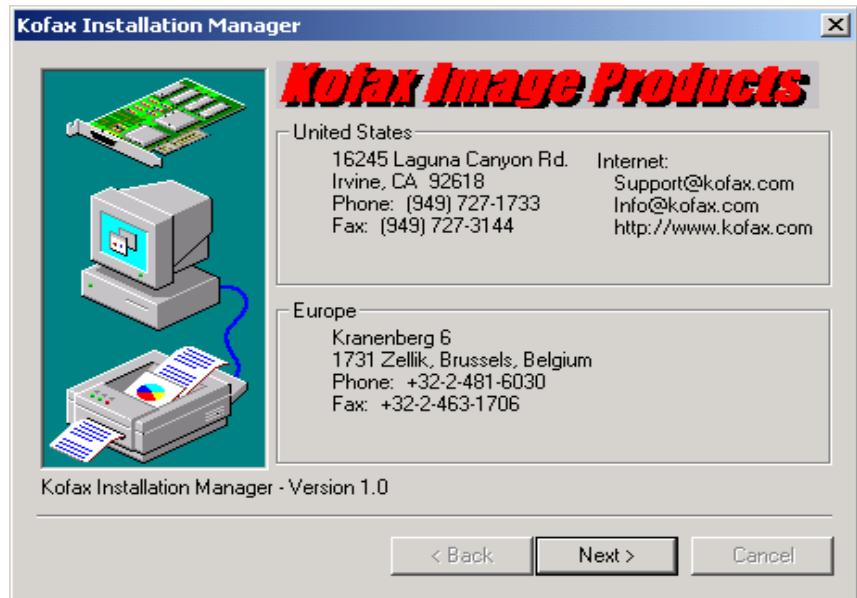
Click **Next** to continue.

5   When the Kofax Finish screen appears, select **Yes** and click **Finish** to restart your computer.

When the computer restarts, the Capture installation process resumes, and the installer registers the various components.

Continue with .

Silent Capture Desktop Installation

Before you can perform a silent install, you must record a complete install on a single station. All of your install preferences are recorded to a response file as described in <u>"Recording the Silent Install Script"</u>. Later you can use the response file to execute a single command and replicate the installation on another station as described in <u>"Running the Silent Install Script" on page 64</u>.

Note   The Kofax AIPE (Adrenaline Image Processing Engine) setup does not support silent install. If you are going to install doc processing you must first install AIPE on **each** station.

Recording the Silent Install Script

1   If you will be installing doc processing during the record mode, you must install AIPE **first**. See <u>"Install the Doc Processing Software" on page 58</u>.

2   Open a command window and run the following command:

D:\>setup /r /f1"c:\capturesetup.iss"

This command generates a response file capturesetup.iss (or any file name you specify) which contains the installation options you selected. You can specify a folder other than the root folder for the location of this file.

Note   The response file is unique to an installation scenario. The configuration details in the recorded and the replicated systems must be identical. For example, the disk drive selected for the install in the response file must be the same as that used in the subsequent silent installations.

Note   There is no space between the **f1** and the **"c:**.

Note   The response file has to be accessible to each station that requires silent install. It can reside on a shared drive or it can be copied to each station.

3   The system displays the InstallShield Wizard dialog box as it prepares to install Capture. Follow the steps for a normal installation as described in <u>"Normal Capture Installation" on page 50</u>.

See instructions for installing Full Text OCR software in the next step.

4   There are 2 methods for installing Full Text OCR software as part of a silent install.

  •   **Installing Full Text OCR software as part of the Capture silent install**. With this install method, select the **PDF/Full Text OCR** check box. You must specify a location for the Full Text OCR software CD. The location you specify should be either a network resource or a secondary CD drive on the current computer. The location recorded in this step will be the location used by each of

the stations to find the Full Text OCR installation software while in Capture Professional Silent install mode.

- **Installing Full Text OCR software separately.** With this install method, you do **not** select the **PDF/Full Text OCR** check box. You install the Full Text OCR software after the Capture Professional Silent installation is complete. This may be convenient if you do not have a network CD drive available or if your computer does not have two CD drives.

   To install the Full Text OCR software separately from the Capture silent install, from a command window, run

      setup /s

   You must do this from the OCR CD location.

5   Continue with <u>"Configuring Capture Manager" on page 71</u>.

6   Continue with <u>"Running the Silent Install Script" on page 64</u> to repeat the recorded steps on the next system in silent mode.
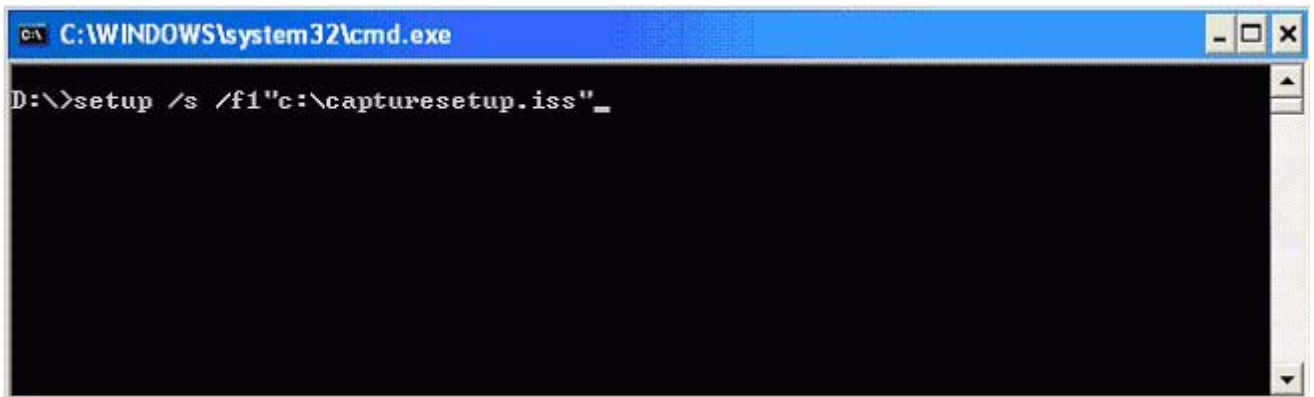
Running the Silent Install Script

Before you can perform a silent installation you must have access to the response file generated as described in <u>"Recording the Silent Install Script" on page 62</u>.

1   Copy the response file to the directory of your choice. In this example, we use the root directory.

2   If you are installing doc processing as part of this silent install, you must install AIPE first. See .

3   Open a command window and run the following command (or use the file name you specified):

      D:\>setup /s /f1"c:\capturesetup.iss"

This command executes the response file recorded in an earlier session.You can specify a folder other than the root folder for the location of this file.

Note   There is no space between the **f1** and the **"c:**.

As the Silent Install executes, you will see FileNet Capture 5.0 in the task bar.

4   There are 2 methods for installing Full Text OCR software as part of a silent install.

•   **Installing Full Text OCR software as part of the Capture silent install**. With this install method, select the **PDF/Full Text OCR** check box. You must specify a location for the Full Text OCR software CD. The location you specify should be either a network resource or a secondary CD drive on the current computer. The location recorded in this step will be the location used by each of the stations to find the Full Text OCR installation software while in Capture Professional Silent install mode.

•   **Installing Full Text OCR software separately.** With this install method, you do **not** select the **PDF/Full Text OCR** check box. You install the Full Text OCR software after the Capture Professional Silent installation is complete. This may be convenient if you do not have a network CD drive available or if your computer does not have two CD drives.

       To install the Full Text OCR software separately from the Capture silent install, from a command window, run

          setup /s

       You must do this from the OCR CD location.

5   After the silent install completes, the computer will restart automatically. After you log in, the Capture installation process resumes and you may see a number of messages while the installer registers the various components.

6   Continue with .

Log Files

No message boxes are displayed when you install a system in Silent mode. All install information is written to a log file. There are two log files for Capture -- Capture setup and Full Text OCR.

The Capture setup file is CaptureSetup.log and contains the following information:

- product name

- installation destination

- which package the user selected

- installation start time and end time

- components added to Capture Manager

- Error messages such as "Please install Kofax DocProcessing before running Capture Setup in silent mode."

The following is an example of a Capture Setup log file:

```
-------------Start of Install on 06-29-2005 15:00:46
Product Name: FileNet Capture 5.0
SILENT MODE
Destination folder:  C:\Program Files\FileNet\Capture\
Capture Record Activator selected.
Begin copying files...
Done copying files.
After reboot at  15:04:10
Added to Capture Manager: scan.ocx
Added to Capture Manager: imageimport.ocx
Added to Capture Manager: ImageVerify.ocx
Added to Capture Manager: kfimageprocess.ocx
Added to Capture Manager: blankpage.ocx
Added to Capture Manager: ZonalOCR.ocx
Added to Capture Manager: EventMgr.ocx
Added to Capture Manager: Assembly.ocx
Added to Capture Manager: index.ocx
Added to Capture Manager: indexverify.ocx
Added to Capture Manager: Merge.ocx
Added to Capture Manager: commit.ocx
Added to Capture Manager: printfax.ocx
Added to Capture Manager: RecordAct.ocx
Added to Capture Manager: fncaptureviewer.ocx
```

The Full Text OCR log file is CaptureFTOCR.log and contains the following information:

- product name

- start time and end time of installation

- error messages

The following is an example of a Full Text OCR log file:

```
-------------Start of Install on 6-19-2005 15:50:11
Product Name: FileNet Capture Full Text OCR 5.0
Full Te
xt OCR component is installed successfully.
--------------End of Install on 6-19-2005 15:50:16
```

Configuring Capture Manager

Before you can connect Capture Desktop to your libraries or object stores, you must configure repository sessions for each library and/or object store for your workstation through Capture Manager

Start Capture Manager

1 From the Windows Toolbar, click on the **Start** button and select **Programs**. Click **FileNet Capture Desktop**, and then select **Capture Manager** from the sub-menu.

2 The Capture Manager window displays. .

Select **Add** in the Repositories section. The system displays the Add Repository dialog box.

3   Type the repository session name in the **Repository Session Name** field. The repository session name defines an alias for the repository.

Select the repository type from the list in the **Repository Type** field.

For **Content Engine repositories**, the dialog box may look like this:

Select the library for the repository session from the **Available Object Stores** listbox.

If CE Client Connectivity has not been configured, selecting a CE repository displays the following error message:

Selected repository types requires installation of Content Engine Client Connectivity software.

For more information on Content Engine Client Connectivity, see "Establishing Content Engine Client Connectivity" on page 33.

For **Content Services repositories**, the dialog box may look like this:

If IDM desktop has not been installed, selecting a CS repository displays the following error message:

Selected repository types require installation of FileNet IDM Desktop.

4   Select an Available Library or Object Store.

5   Type the user name in the **User Name** field to automatically log in to the library or object store when Capture starts. If you leave this field blank, the operator will be prompted to enter the information each time Capture starts.

If you entered a user name, type the associated password in the **Password** field. If you leave this field blank and a password is required, the operator will be prompted to enter the password each time Capture starts.

For shared repositories only, type the **Data Source Name** configured in Microsoft's ODBC Data Source Administrator utility.

Note   If you are using Windows NT authentication, these fields will be grayed out.

Click **OK** to add the repository.

6   When you have configured all the necessary repositories, click **Close**.

Testing the Scanner and Capture Desktop Installation

When you have completed the installation process, verify that the scanner is functioning properly with the software. Use the following procedure to do this.

Start Capture Desktop

1   From the Windows Toolbar, click **Start** and select **Programs**. Click **FileNet Capture Desktop**, and then select **Capture Desktop** from the sub-menu.

2   Enter a user name and password if prompted to do so.

3   When the program loads, you should see the Advanced Mode Capture Desktop window, as shown in the next illustration.
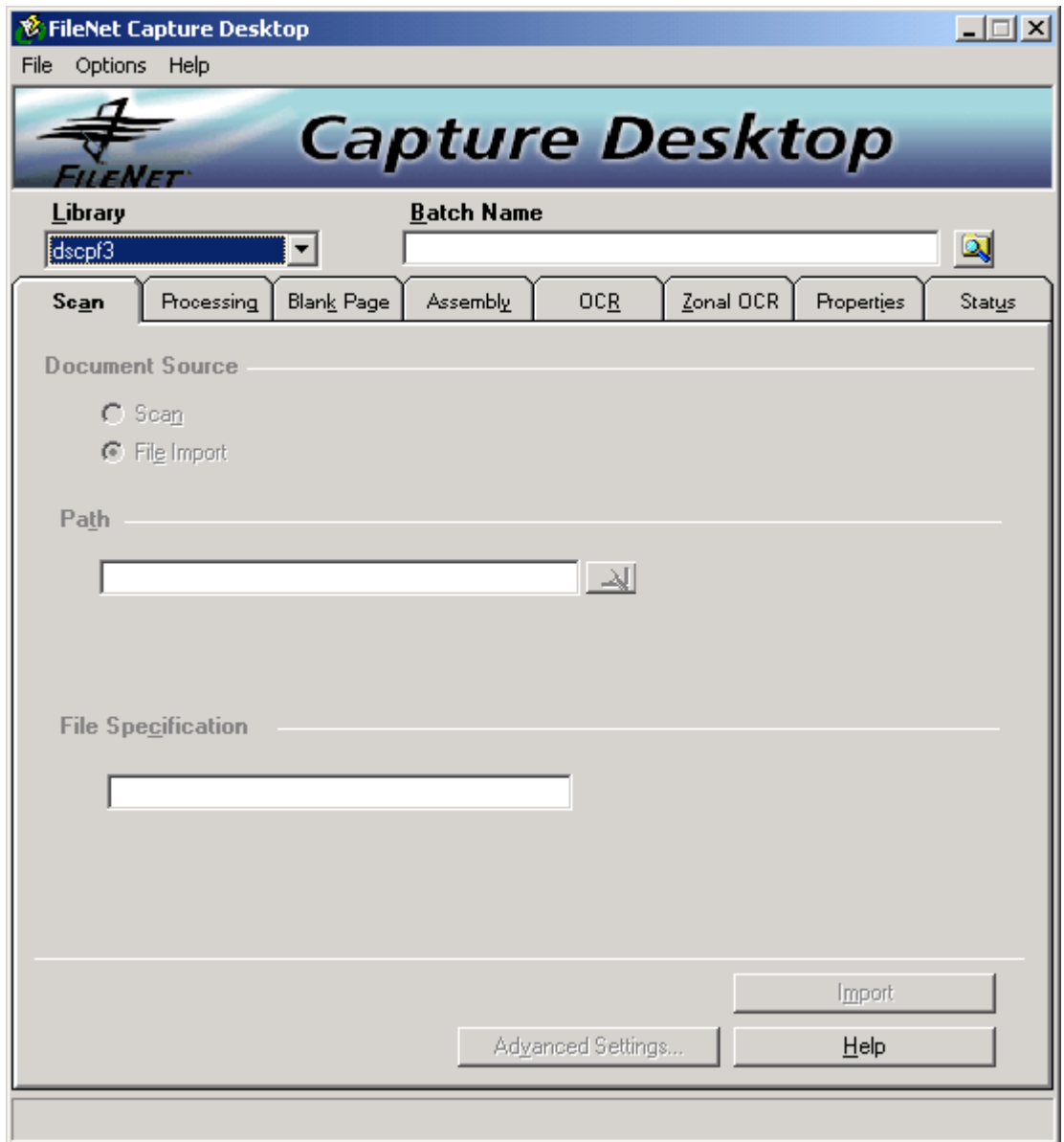
4 To specify the type of scanner you are using, open the **Options** menu from the toolbar and choose **Select Scanner**. Select the type of scanner you are using from the list displayed.

If you are using a Kofax board and created a source during configuration of the Kofax Source Manager (KSM), select the source name you specified (such as "Kofax Engine 1"). Click **OK**.
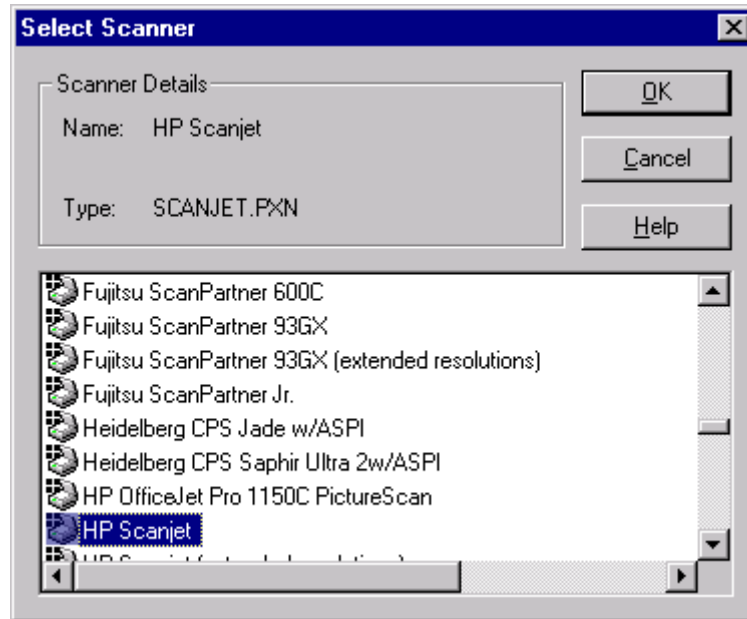
Create a New Test Folder and Batch

Before you can scan (or capture) pages, you must create a batch. Use the following procedure to create a new test batch in your selected library.

1 On the Capture Desktop screen, select the library you want to use from the **Library** list.

2 Click the Browse icon next to the **Batch Name** field to display the Select Batch dialog box.

3 Highlight your library name and click **Create Folder**. Enter your folder name and click **OK**.
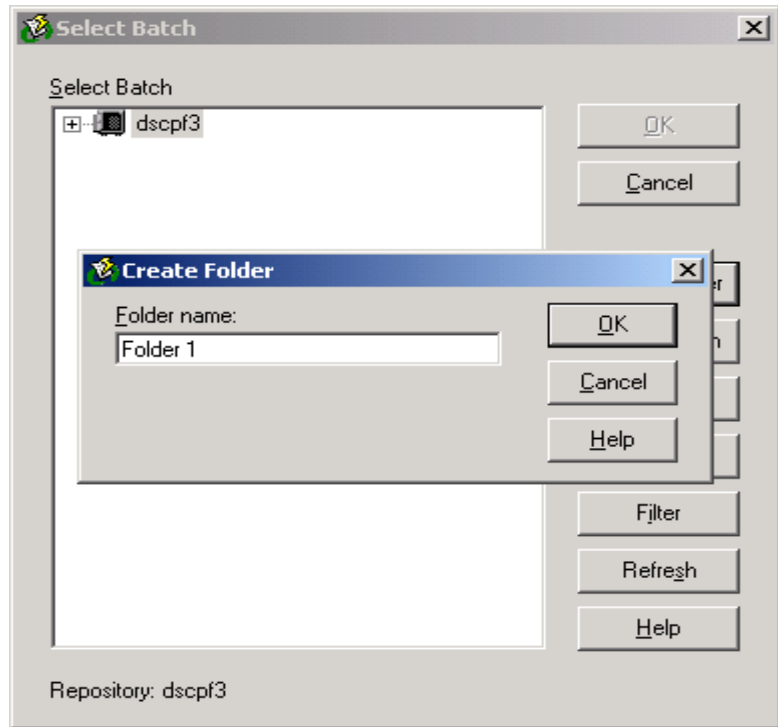
4 With your new folder name highlighted, click **Create Batch** to display the Create Batch dialog box. Enter the batch name. Select the document class from the **Document class** list.
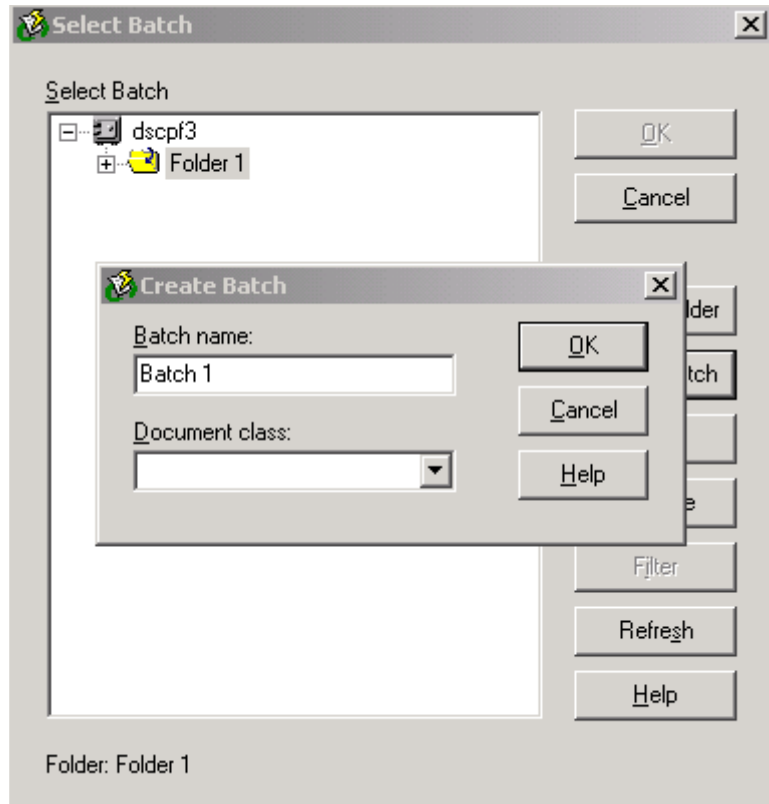
Click **OK**.

5 Click **OK** in the Select Batch dialog box to confirm the batch creation.

Set Scanner Settings

To configure scanner options, select the **Scan** radio button on the Scan tab, and then click the **Advanced Settings** button. This displays the Scan Properties dialog box.
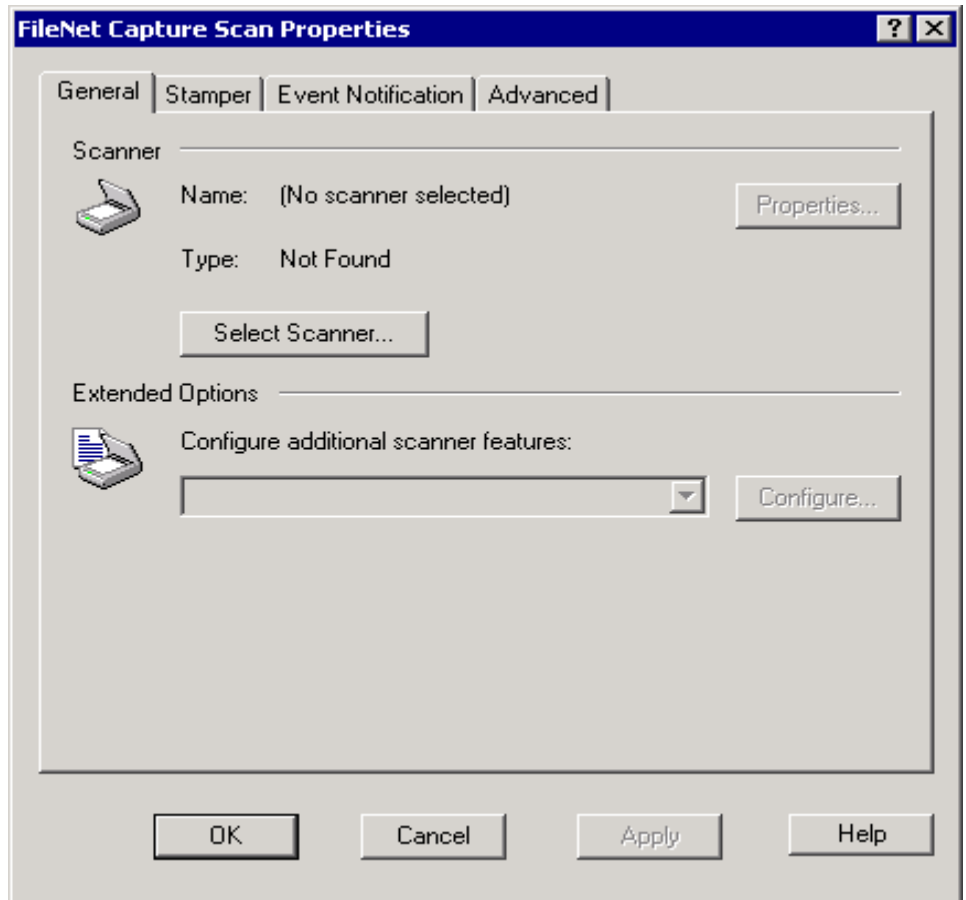
Depending on the type of scanner you are using, the configuration options presented may differ. For specific information on options available through the Extended Options, refer to the documentation provided with your scanner or scanner driver.

Scan a Test Image

1 From the Capture Desktop screen, verify that the Library field contains the correct library and that the Batch Name field contains your new batch.

2 Verify that your scanner is configured. Select the **Scan** radio button. Click the **Advanced Settings** button in the lower-right corner. If your scanner is configured, it appears in the Scanner field on the General tab.

If your scanner is not configured:

a Click the **Select Scanner** button and select a scanner from the list.

b Click **Apply** to add your scanner. Click the **OK** button to close the Advanced Settings list.

3 Place a test sheet in the scanner's feeder tray or on the flatbed of the scanner.

4 In the Document Source section, verify that the **Scan** radio button is selected. Then click the **Scan** button on the lower-right corner of the screen to display the Scan window.

5 If you want to see the page in the Contents window, select the **Enable Viewer** check box in the lower left corner of the window.

6 Click the **Start** button at the top of the window. The scanner initializes and scans the test sheet.
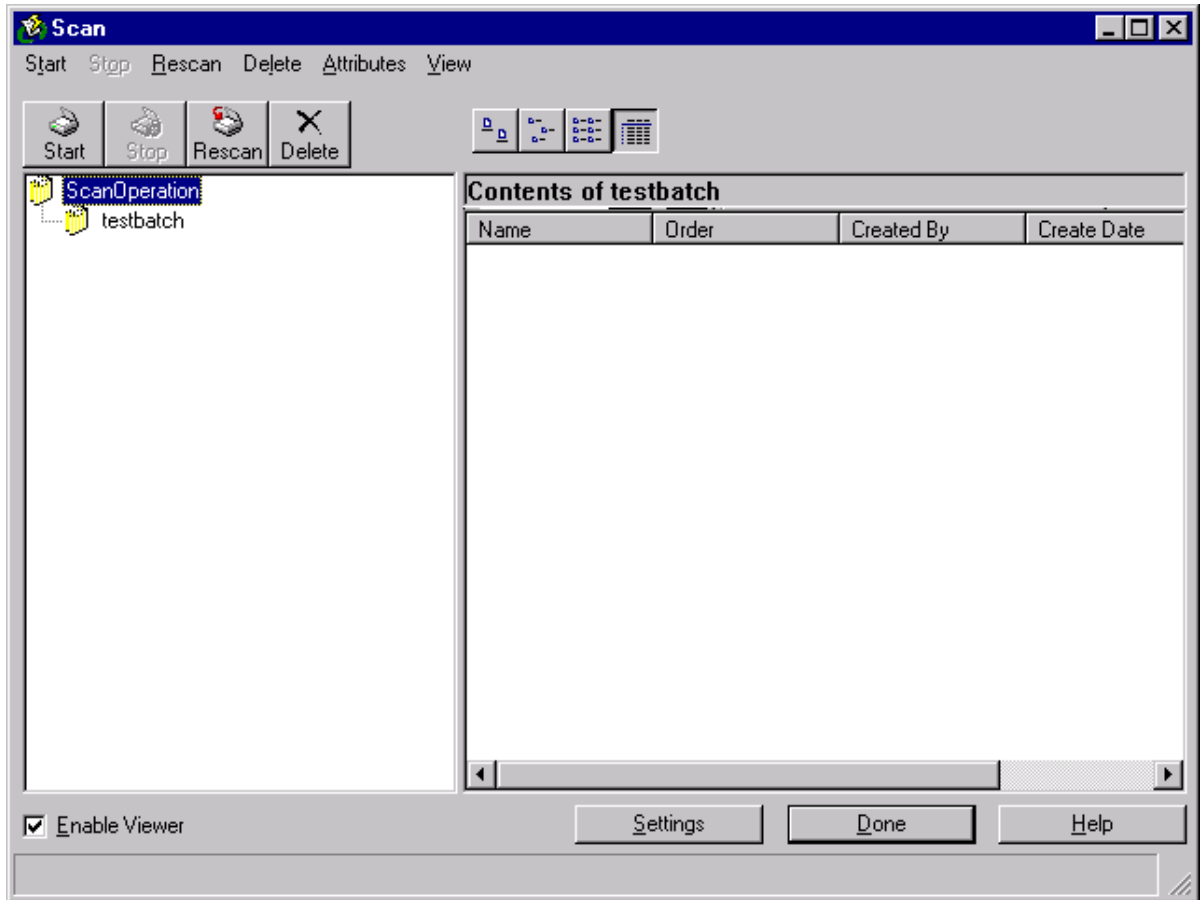
7 If the page was successfully scanned, the newly-acquired image displays under the selected batch as a page icon in the Scan window. If you checked the Enable Viewer check box, the scanned page will display in the Contents window.
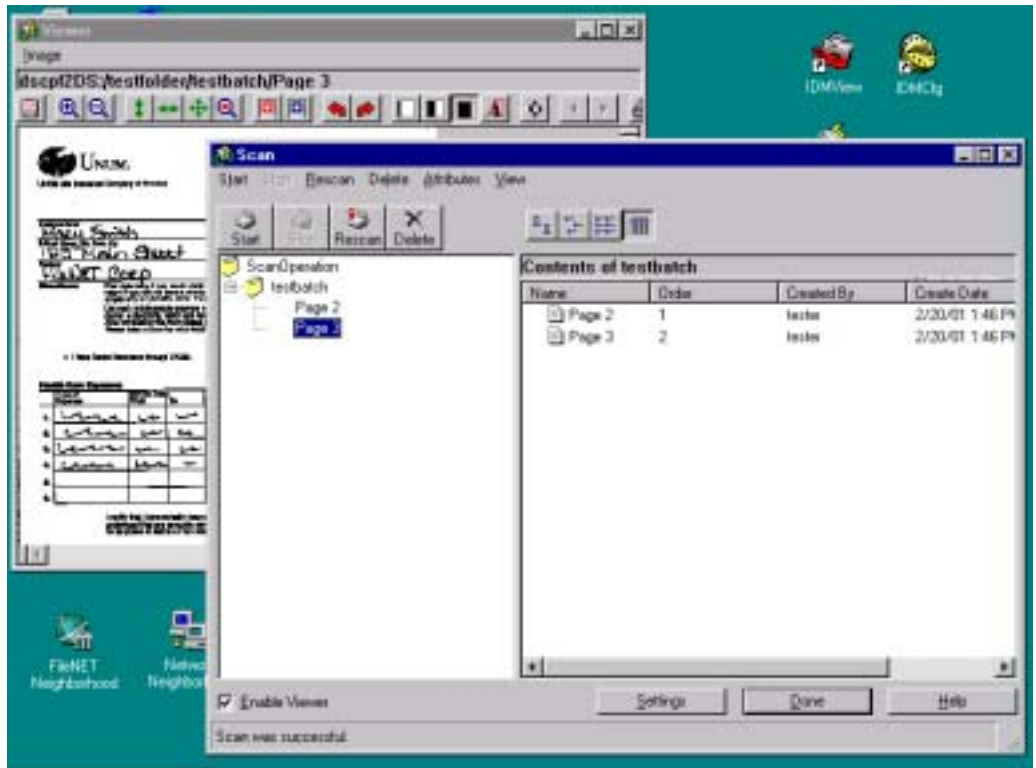
8   On the Scan screen, click **Done** at the bottom when you are finished. Depending on your scanner, a pop-up may ask you to confirm that you are finished. If you were not able to scan the page, go back and verify each of the installation procedures.

9   You should delete this test batch when your scanner tests are complete.

6

Installing Software for Capture Professional Scanning Workstations

Begin the installation by inserting the Capture CD. If the Capture Setup screen is not displayed on the screen, run Splash.exe.

You can install/uninstall Capture Professional using one of the following methods:

- Normal Capture Installation

- Silent Capture Installation

- Normal Capture Uninstall

- Silent Capture Uninstall

Normal Capture Professional Installation

1 Select **Install Capture (Normal)** from the FileNet Capture Setup screen.

2 Click **Next** to advance through the Welcome screen.

3 Click **Yes** to agree with the Software License Agreement. A copy of the End User Software License Agreement is also available in "Appendix A – Software License Agreement" on page 157.

4 Enter the Software License Authorization Key. The Software License Authorization Key determines the scanner support package, and what options are available, if any. Authorization keys are attached to the Terms and Conditions Booklet and/or Software License. Click **Next** to continue.

5 Choose a file location to install Capture Professional.

The default destination folder is shown near the bottom of the screen. Click **Browse** to select a different directory.
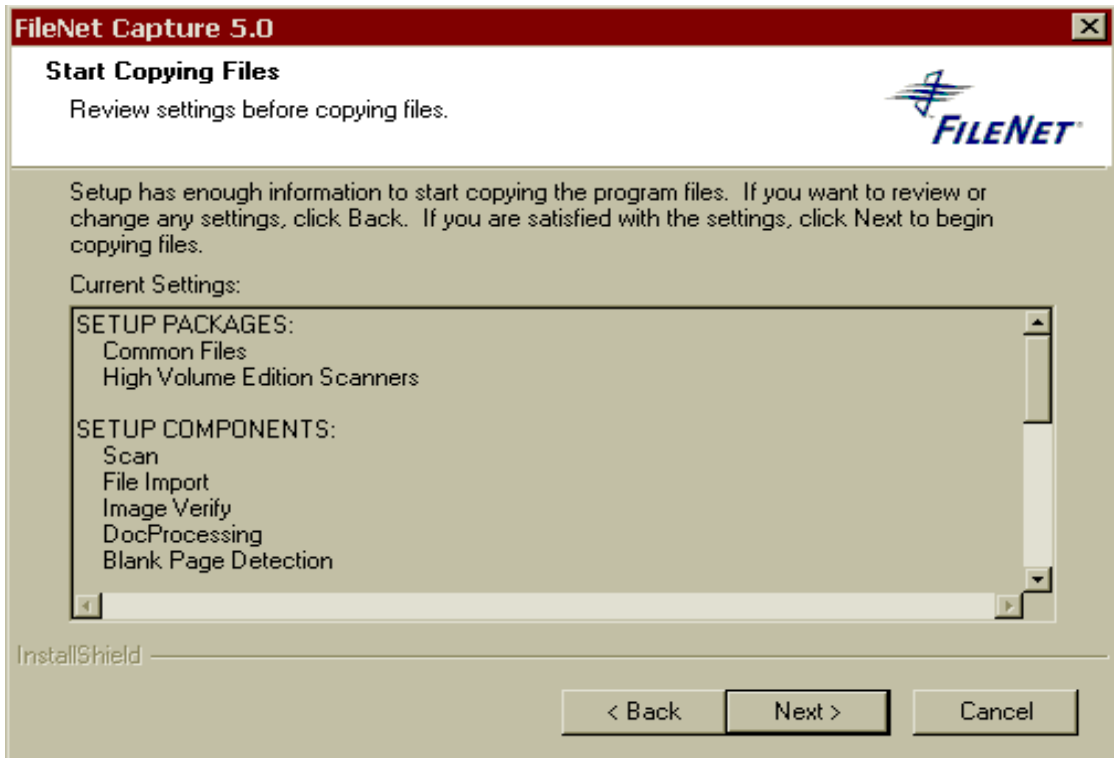
Click **Next** to continue.

6 Specify the packages you are installing.

a **Scanner Support** is already selected.

b Select the **PDF/ Full Text OCR** check box if you will also be installing the optional Full Text OCR package. This package is provided on a separate CD.

c Select the **Capture DocProcessing** check box to install the optional software Doc Processing package. Software Doc Processing is provided on a separate CD.

Note You do not need to select this box if you will be using the Doc Process-
ing features provided by a Kofax scanner interface card (hardware Doc
Processing).

7 Click **Next** to continue.

8 On the **Start Copying Files** screen, review the selections. Use the
Back button to go back and change selections, if necessary. Click
Next to continue.

FileNet Capture 5.0

Start Copying Files

Review settings before copying files.

FILENET

Setup has enough information to start copying the program files. If you want to review or
change any settings, click Back. If you are satisfied with the settings, click Next to begin
copying files.

Current Settings:

```
SETUP PACKAGES:
    Common Files
    High Volume Edition Scanners

SETUP COMPONENTS:
    Scan
    File Import
    Image Verify
    DocProcessing
    Blank Page Detection
```

InstallShield

< Back   Next >   Cancel

9 The installation program then installs the selected packages on the system. To abort the installation, click **Cancel**.

10 If you are installing the optional Full Text OCR, continue with <u>"Install the Full Text OCR Software" on page 94</u>.

11 If you are installing the optional Document Processing package (and not Full Text OCR), continue with <u>"Install the Doc Processing Software" on page 95</u>.
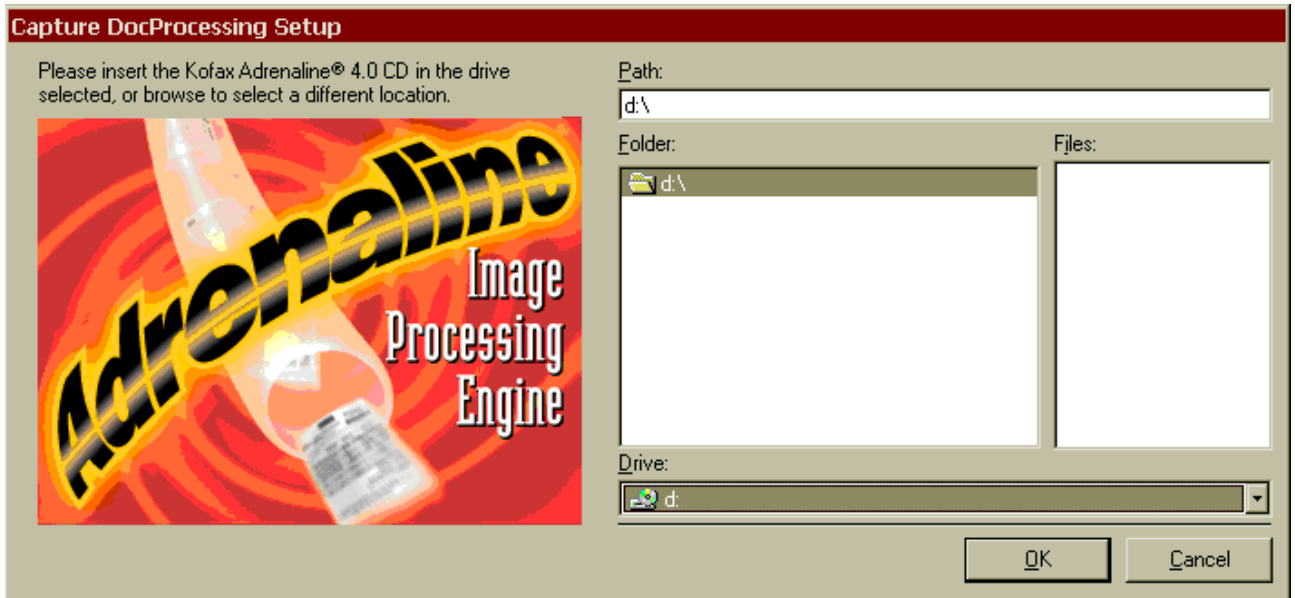
12 If you selected only the Scanner Support package, the Setup Complete screen appears. Click **Finish** to restart your computer manually, or the computer will restart automatically in 15 seconds.
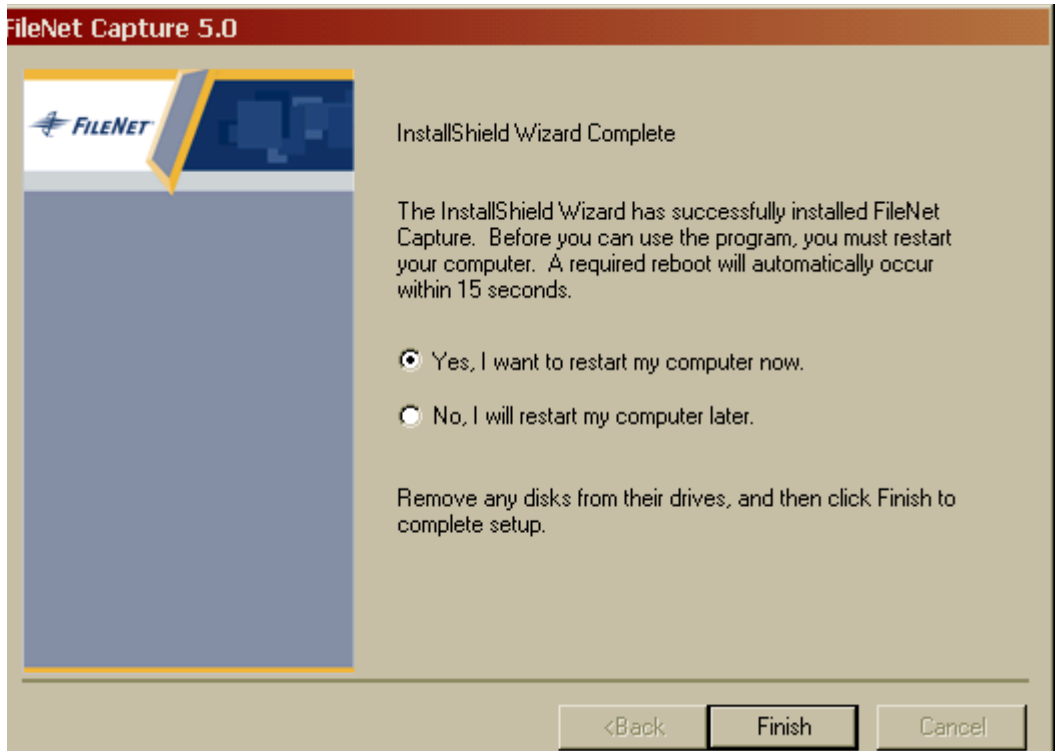
When the computer restarts, and after you log in, the Capture installation process resumes and you may see a number of messages while the installer registers the various components.

If you have no more options to install, continue with "Configuring Capture Manager" on page 106.

Install the Full Text OCR Software

When prompted, insert the Full Text OCR CD (OCR-2-PDF) to begin the installation.

1   Insert the Full Text OCR CD in your drive and navigate to the drive that contains the CD, using the dialog as necessary. You do not need to specify a folder or file.

Click the **OK** button after entering the correct drive letter.

The system displays the InstallShield Wizard dialog box and installs Full Text OCR.

2   When the installation is complete, if you are installing the optional Document Processing package, continue with "Install the Doc Processing Software" on page 95.

If you are not installing Document Processing, continue with the next step.

3   The Setup Complete screen appears. Click **Finish** to restart your computer manually, or the computer will restart automatically in 15 seconds.

When the computer restarts, the Capture installation process resumes and the installer registers the various components.

Continue with "Configuring Capture Manager" on page 106.
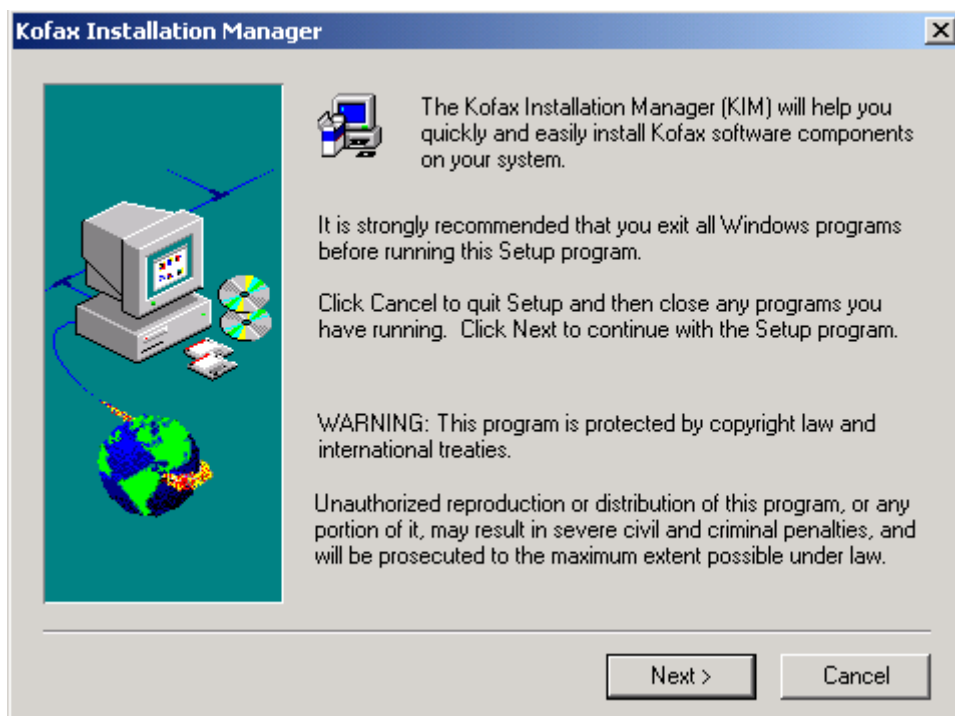
Install the Doc Processing Software

If you selected the option to install Software DocProcessing (also re-
ferred to as the Adrenaline software doc processing) during the instal-
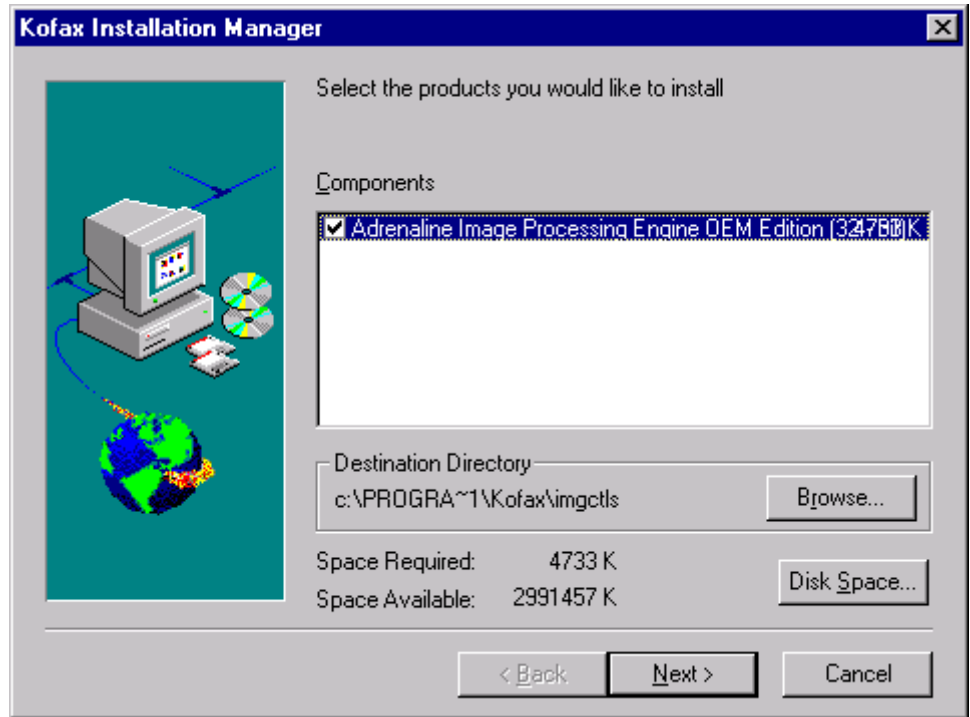lation process, setup will display this screen:

1   Insert the Kofax Adrenaline CD in your drive and navigate to the drive
that contains the Kofax Adrenaline CD using the dialog as necessary.
You do not need to specify a folder or file.

Click **OK** after you have selected the appropriate drive letter from the
dialog. The Kofax Setup will create the Installation Wizard to install
Adrenaline.

2 When the Kofax Installation Manager screen appears, read the instructions and click **Next** to continue.

3 Verify that the Adrenaline Image Processing Engine is selected for installation. Use **Browse** to change the installation directory from the default shown, if necessary. Click **Next** to continue.

You will see a status bar while the installer copies the files to your system, and then the Kofax Installation Manager screen.

Click **Next** to continue.

4 On the final screen, select **Yes** and click **Finish** to restart your computer.
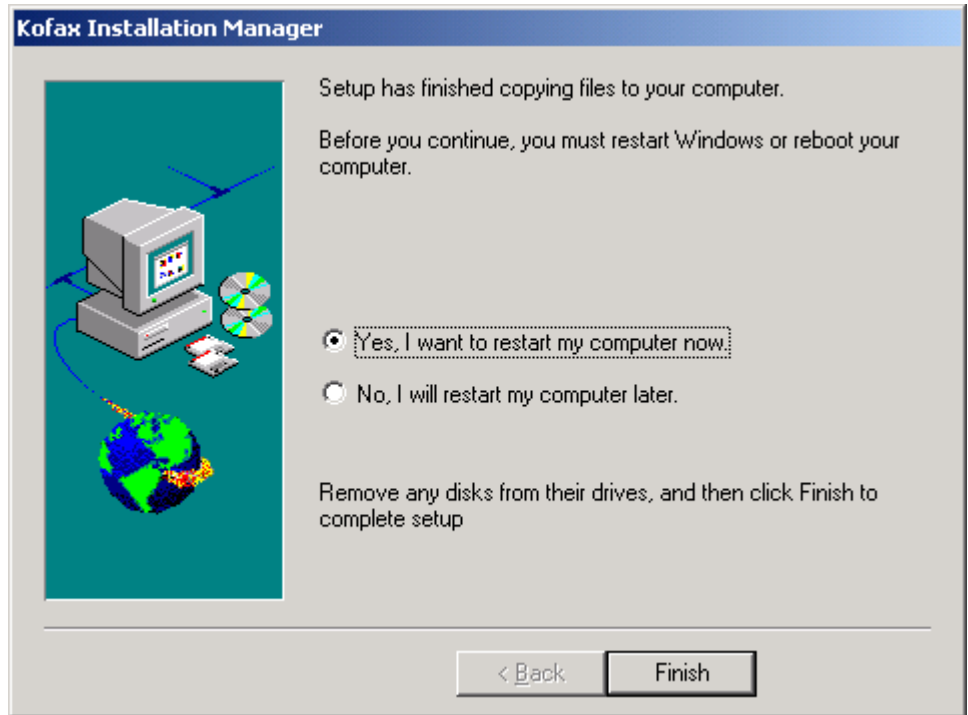
When the computer restarts and after you log in, the Capture installation process resumes, and the installer registers the various components.

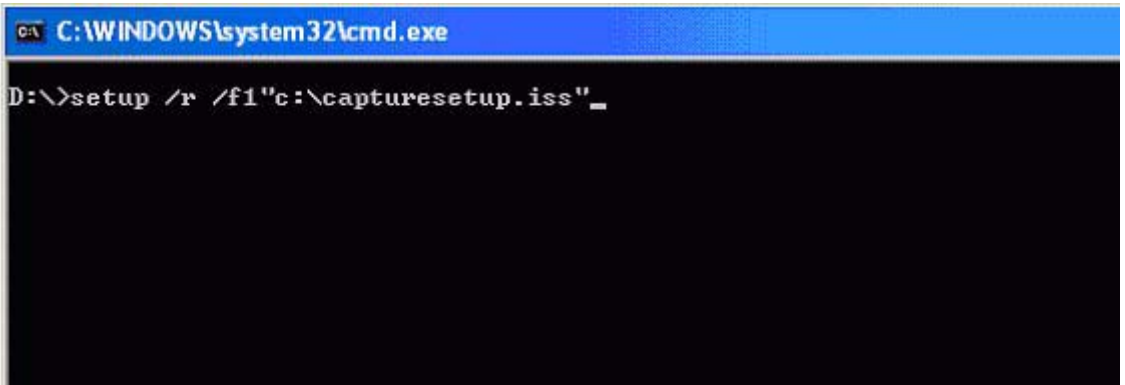Continue with .

Silent Capture Professional Installation

Before you can perform a silent install, you must record a complete install on a single station. All of your install preferences are recorded to a response file as described in "Recording the Silent Install Script". Later you can use the response file to execute a single command and replicate the installation on another station as described in "Running the Silent Install Script" on page 102.

Note The Kofax AIPE (Adrenaline Image Processing Engine) setup does not support silent install. If you are going to install doc processing you must first install AIPE on **each** station.

Recording the Silent Install Script

1 If you are installing doc processing during the record mode, you must install AIPE first. See "Install the Doc Processing Software" on page 95.

2 Open a command window and run the following command (or you can specify a file name):

D:\>setup /r /f1"c:\capturesetup.iss"

This command generates a response file capturesetup.iss (or the file name you specify) which contains the installation options you selected. You can specify a folder other than the root folder for the location of this file.

Note   The response file is unique to an installation scenario. The configuration details in the recorded and the replicated systems must be identical. For example, the disk drive selected for the install in the response file must be the same as that used in the subsequent silent installations.

Note   There is no space between the **f1** and the **"c:**.

Note   The response file has to be accessible to each station that requires silent install. It can reside on a shared drive or it can be copied to each station.

3   The system displays the InstallShield Wizard dialog box as it prepares to install Capture. Follow the steps for a normal installation as described in <u>"Normal Capture Professional Installation" on page 87</u>.

See instructions for installing Full Text OCR software in the next step.

4   There are 2 methods for installing Full Text OCR software as part of a silent install.

•   **Installing Full Text OCR software as part of the Capture silent install**. With this install method, select the **PDF/Full Text OCR** check box. You must specify a location for the Full Text OCR software CD. The location you specify should be either a network resource or a secondary CD drive on the current computer. The

location recorded in this step will be the location used by each of the stations to find the Full Text OCR installation software while in Capture Professional Silent install mode.

- **Installing Full Text OCR software separately.** With this install method, you do **not** select the **PDF/Full Text OCR** check box. You install the Full Text OCR software after the Capture Professional Silent installation is complete. This may be convenient if you do not have a network CD drive available or if your computer does not have two CD drives.

  To install the Full Text OCR software separately from the Capture silent install, from a command window, run

  setup /s

  You must do this from the OCR CD location.

5   Continue with .

6   Continue with to repeat the recorded steps on the next system in silent mode.

Running the Silent Install Script

Before you can perform a silent installation you must have access to the response file generated earlier. See "Recording the Silent Install Script" on page 99.

1 Copy the response file to the directory of your choice. In this example, we use the root directory.

2 If you are installing doc processing as part of the silent install, you must install AIPE first. See "Install the Doc Processing Software" on page 95.

3 Open a command window and run the following command (or use the file name you specified):

D:\>setup /s /f1"c:\capturesetup.iss"

Note There is no space between the **f1** and the **"c:**.

This command executes the response file recorded in an earlier session.

4   There are 2 methods for installing Full Text OCR software as part of a silent install.

- **Installing Full Text OCR software as part of the Capture silent install**. With this install method, select the **PDF/Full Text OCR** check box. You must specify a location for the Full Text OCR software CD. The location you specify should be either a network resource or a secondary CD drive on the current computer. The location recorded in this step will be the location used by each of the stations to find the Full Text OCR installation software while in Capture Professional Silent install mode.

- **Installing Full Text OCR software separately.** With this install method, you do **not** select the **PDF/Full Text OCR** check box. You install the Full Text OCR software after the Capture Professional Silent installation is complete. This may be convenient if you do not have a network CD drive available or if your computer does not have two CD drives.

  To install the Full Text OCR software separately from the Capture silent install, from a command window, run

    setup /s

  You must do this from the OCR CD location.

5   After the Silent install completes, the computer will restart automatically. After you log in, the Capture installation process resumes and you may see a number of messages while the installer registers the various components.

6   Continue with .

Log Files

No message boxes are displayed when you install a system in Silent mode. All install information is written to a log file. There are two log files for Capture -- Capture setup and Full Text OCR.

The Capture setup file is CaptureSetup.log and contains the following information:

- product name

- installation destination

- which package the user selected

- installation start time and end time

- components added to Capture Manager

- Error messages such as "Please install Kofax DocProcessing before running Capture Setup in silent mode."

The following is an example of a Capture Setup log file:

```
------------Start of Install on 06-29-2005 15:00:46
Product Name: FileNet Capture 5.0
SILENT MODE
Destination folder:  C:\Program Files\FileNet\Capture\
Capture Record Activator selected.
Begin copying files...
Done copying files.
After reboot at  15:04:10
Added to Capture Manager: scan.ocx
Added to Capture Manager: imageimport.ocx
Added to Capture Manager: ImageVerify.ocx
Added to Capture Manager: kfimageprocess.ocx
```

```
Added to Capture Manager: blankpage.ocx
Added to Capture Manager: ZonalOCR.ocx
Added to Capture Manager: EventMgr.ocx
Added to Capture Manager: Assembly.ocx
Added to Capture Manager: index.ocx
Added to Capture Manager: indexverify.ocx
Added to Capture Manager: Merge.ocx
Added to Capture Manager: commit.ocx
Added to Capture Manager: printfax.ocx
Added to Capture Manager: RecordAct.ocx
Added to Capture Manager: fncaptureviewer.ocx
```

The Full Text OCR log file is CaptureFTOCR.log and contains the following information:

- product name

- start time and end time of installation

- error messages

The following is an example of a Full Text OCR log file:

```
-------------Start of Install on 5-19-2005 15:50:11
Product Name: FileNet Capture Full Text OCR 5.0
Full Text OCR component is installed successfully.
--------------End of Install on 5-19-2005 15:50:16
```

Configuring Capture Manager

Before you can connect Capture Professional to your libraries or object stores, you must configure repository sessions for each library and/or object store for your workstation through Capture Manager.
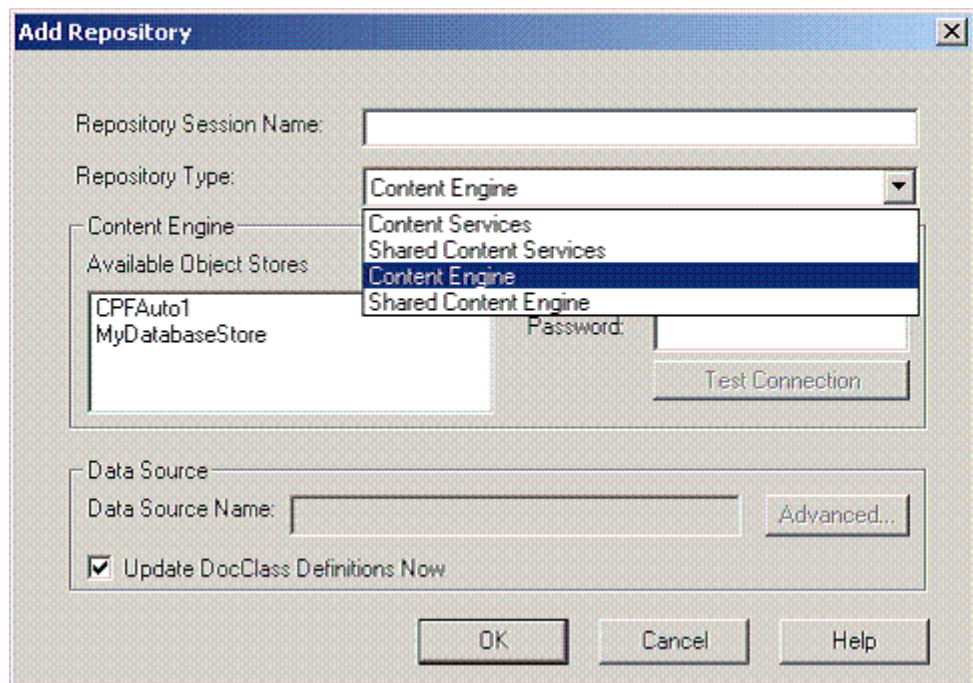
Start Capture Manager

1 From the Windows Toolbar, click on the **Start** button and select **Programs**. Click **FileNet Capture Professional** and **Capture Manager** from the sub-menu.

2 The Capture Manager window displays. .

Select **Add** in the Repositories section. The system displays the Add Repository dialog box.

3 Type the repository session name in the **Repository Session Name** field. The repository session name defines an alias for the repository.

Select the repository type from the list in the **Repository Type** field.

For **Content Engine repositories**, the dialog box may look like this:
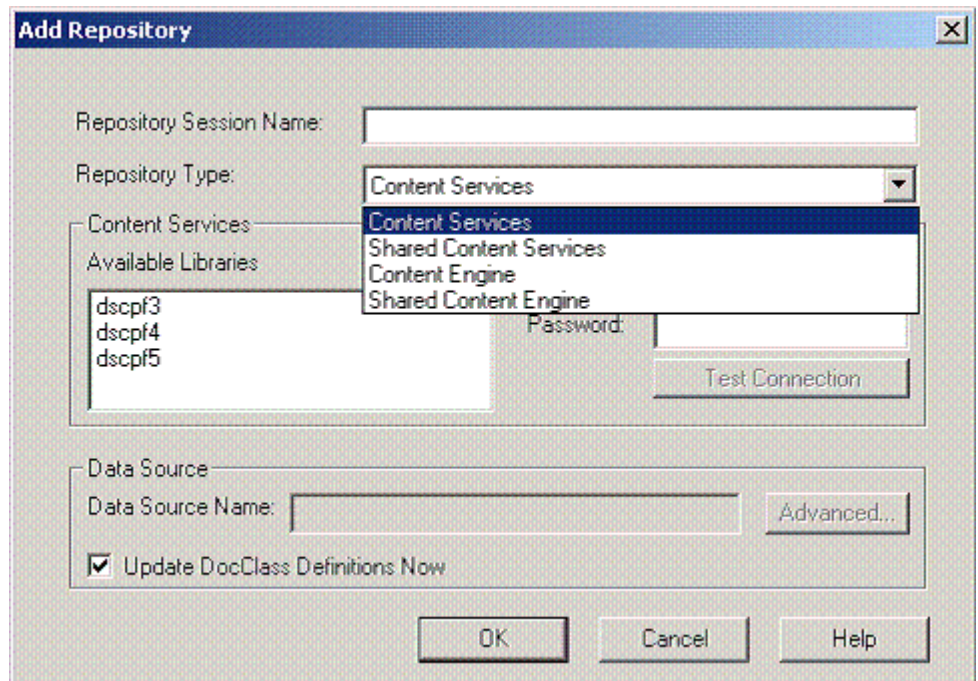

Select the library for the repository session from the **Available Object Stores** listbox.

If CE Client Connectivity has not been configured, selecting a CE repository displays the following error message:

Selected repository types requires installation of Content Engine Client Connectivity software.

For more information on Content Engine Client Connectivity, see "Establishing Content Engine Client Connectivity" on page 33.

For **Content Services repositories**, the dialog box may look like this:

If IDM desktop has not been installed, selecting a CS repository displays the following error message:

Selected repository types require installation of FileNet IDM Desktop.

4   Select an Available Library or Object Store.

5   Type the user name in the **User Name** field to automatically log in to the library or object store when Capture starts. If you leave this field blank, the operator will be prompted to enter the information each time Capture starts.

If you entered a user name, type the associated password in the **Password** field. If you leave this field blank and a password is required, the operator will be prompted to enter the password each time Capture starts.

For shared repositories only, type the **Data Source Name** configured in Microsoft's ODBC Data Source Administrator utility.

Note   If you are using Windows NT authentication, these fields will be grayed out.

Click **OK** to add the repository.

6   When you have configured all the necessary repositories, click **Close**.

Continue with

Testing the Scanner and Capture Professional Installation

When you have completed the software installation process, verify the scanner is functioning properly with the software. Use the following procedure to configure the default scanner and test the installation.
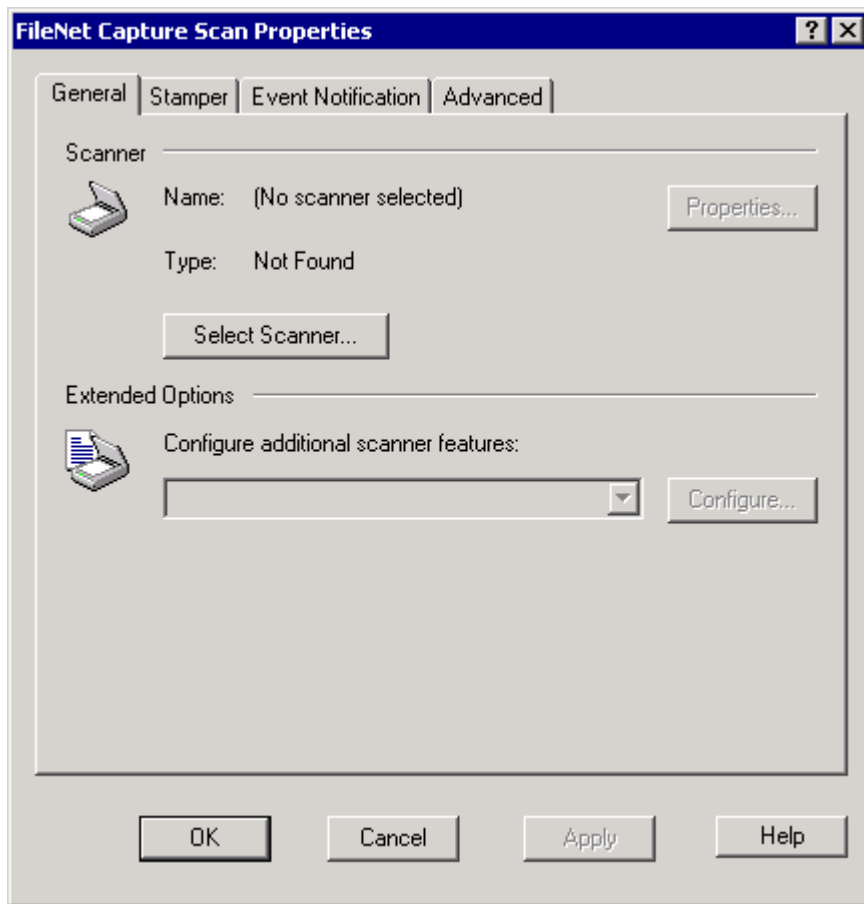
Start Capture Professional

1 From the Windows Toolbar, click **Start** and select **Programs**. Select **FileNet Capture**, and then select **Capture Professional** from the sub-menu.

2 Enter a user name and password if prompted to do so.

3 When the program loads, you should see three panes on the main Capture Professional window. The first pane (upper-left portion of the screen) is referred to as the Tree view and is similar to the Windows Explorer. You should see at least one node in the Tree view, represent-

ing an available repository. (You should always see the Local Repository and any other available repositories.)
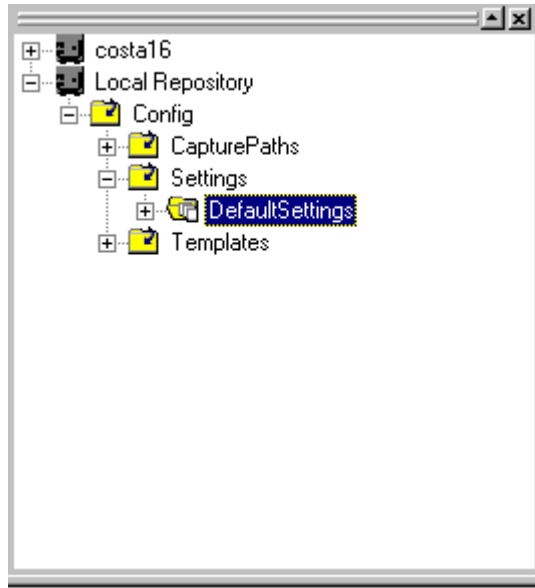
4 In this procedure, you will select the scanner to be used as the default scanner. To do this, configure the Scan component for the default settings collection. Capture uses this scanner configuration whenever a batch is created using the default settings collection.

5 Open the Local Repository in the Tree view. (Since you are doing this configuration as part of a test, do not use any remote or BES repository at this time. Limit your configuration changes and testing to the local repository.)

6 Open the Config folder.

FileNet Capture Scan Properties `? X`

General | Stamper | Event Notification | Advanced |

Scanner

Name: (No scanner selected)

Type: Not Found

Select Scanner...

Properties...

Extended Options

Configure additional scanner features:

Configure...

OK   Cancel   Apply   Help

**7** Open the Settings node. Highlight the DefaultSettings object.

Your Tree view pane should look like this:
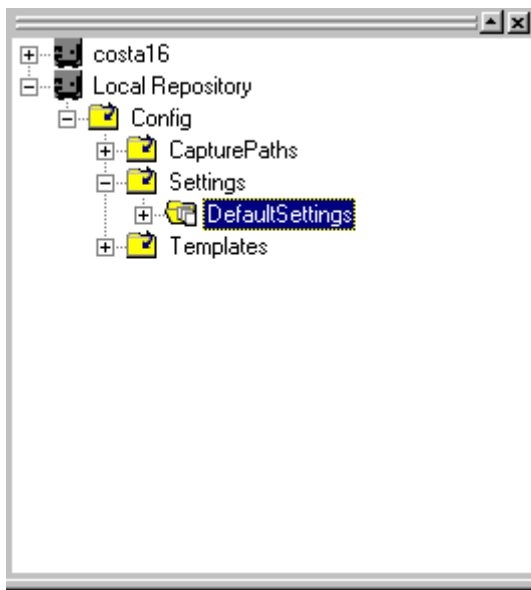
8 To select the scanner, select the **Tools** command from the menu bar, then select **Configure**. Select **Scan** from the list of components to display the FIleNet Capture Scan Properties dialog.
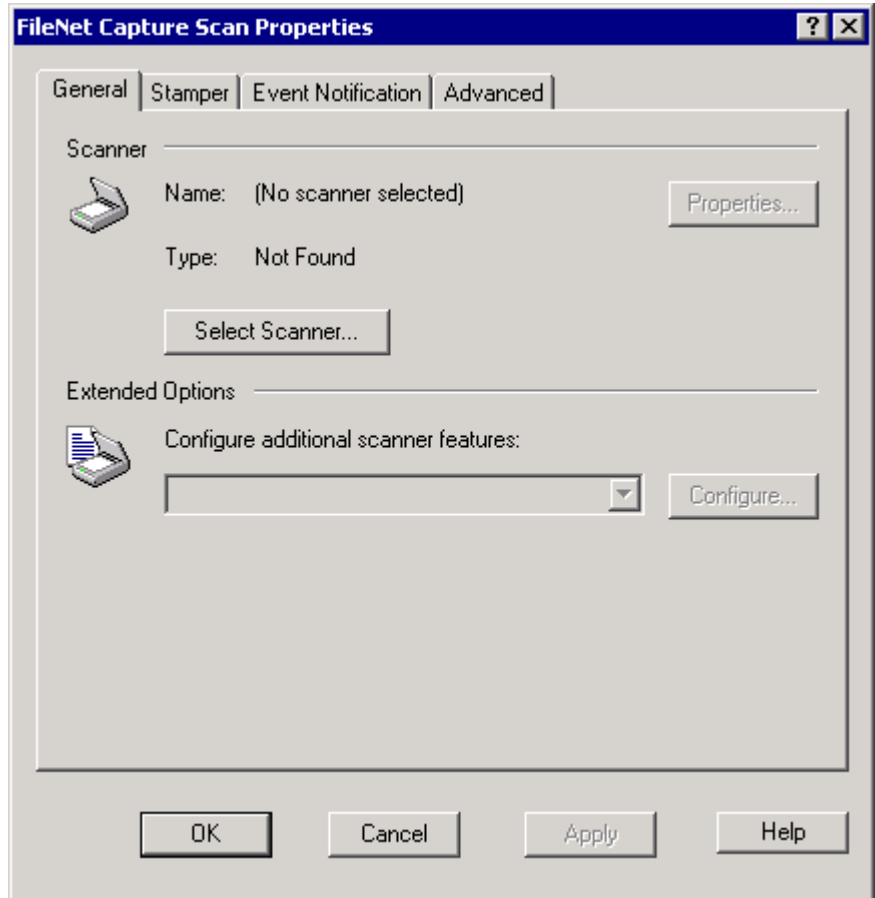
9 Click **Select Scanner** on the General tab. Select the type of scanner you are using from the list displayed. If you are using a Kofax board and created a source during configuration of the Kofax Source Manager (KSM), select the source name you specified (such as "Kofax Engine 1").
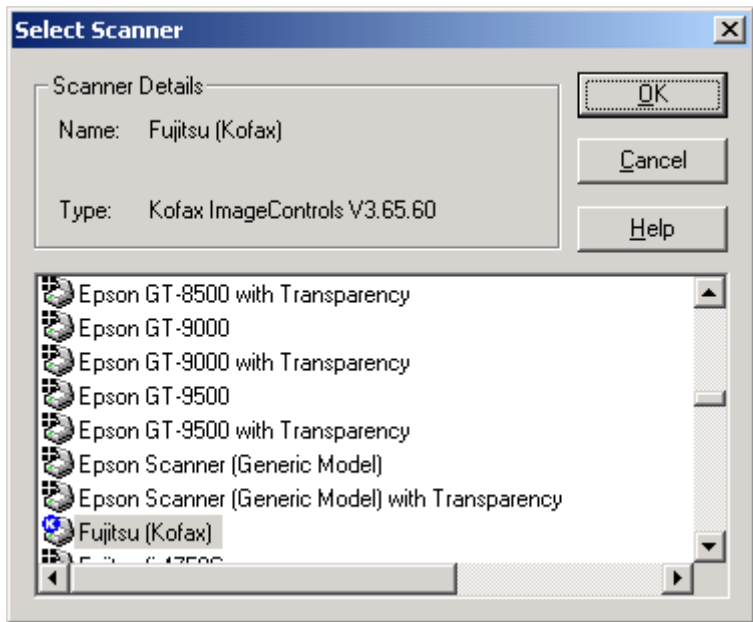
Click **OK** when you are done.

10 To configure scanner options, select a category from the Extended Options list, or use the options on the other tabs on the Scan Properties page. Note that any settings you configure here will be used for all batches based on the DefaultSettings settings collection.
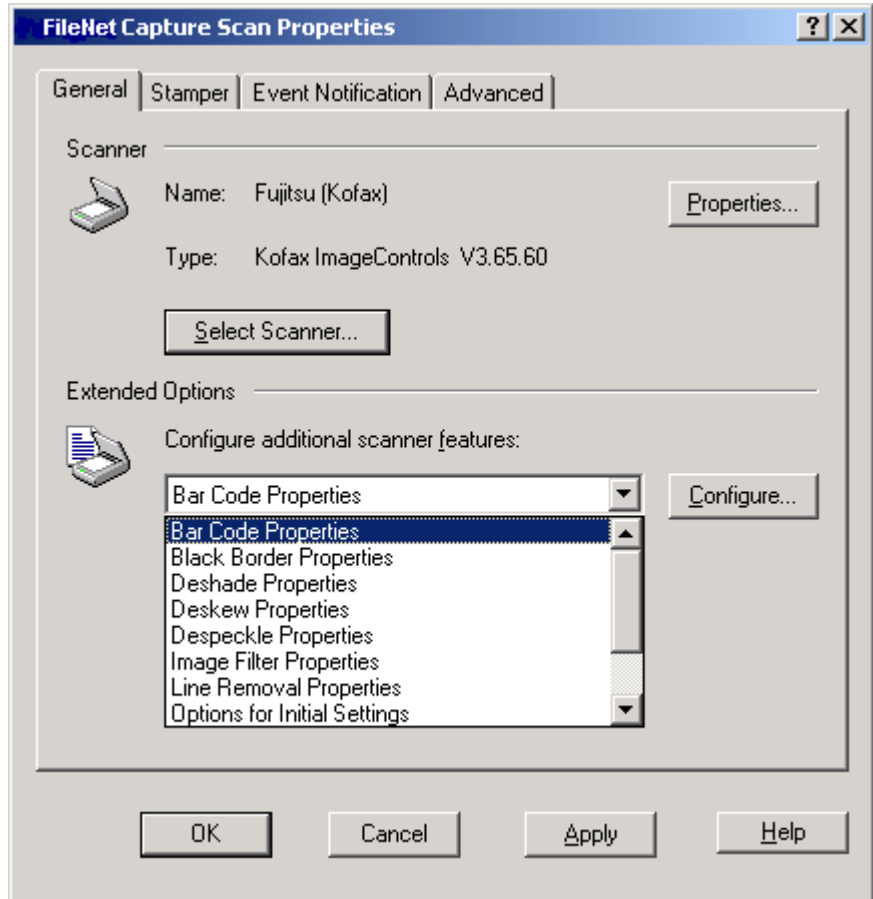
If you want to set configuration settings differently for individual batches, select the batch from the Tree view (rather than the Default-Settings object in the Config folder), and then select Tools, Configure, Scan to display the Capture Scan Properties dialog.

Click **Help** to display information about the options on each tab.

Create a New Test Batch

Before you can scan (or "capture") pages, you must create a batch. Use the following procedure to create a new test batch on the Local Repository:

1   Right-click the Local Repository node in the Tree view.

2   Select the **New Batch** command from the context menu. This displays the New Batch dialog box. Complete the dialog box as follows:

    a   Enter **Test** in the **Batch Name** field.

    b   Select **DefaultTemplate** for the template.

3   Click **OK** to create the batch.

Scan a Test Image

1   From the Tree view, highlight the name of the batch you just created.

2   Place a test sheet in the scanner's feeder tray or on the flatbed of the scanner.

3   From the **Tools** menu, click **Configure**. Then select the **Scan** component to display the Scan Properties dialog box.

4   The scanner you selected earlier should appear in the Scanner field. If it does not, click the **Select Scanner** button, and then select your scanner type from the list.

5   Click **OK** to close the configuration dialog.

6   From the **Tools** menu, click **Start**. Then select **Scan**. The scanner initializes and the scanner scans the test sheet.

7   If the page was successfully scanned, the page displays under the selected batch as a page icon in the List view of the Capture window. Double-click this page icon to display the page in the Workspace view.

If you were not able to scan the page, go back and verify each of the installation procedures.

8   You can delete this test batch when your scanner tests are complete.

Test Connections

Once you have tested the software and scanner operation (see "Scan a Test Image" on page 117), verify the workstation is attached and communicating with the library.

Within the Tree view, you should see at least two nodes: the Local Repository, which you used in the previous test, and the library you specified during the installation process.

Make sure the library is operational. Try to attach to the library using another workstation or another FileNet product, if possible. If you cannot identify the source of the problem, restart the workstation and make a note of any messages you receive while the workstation attempts to attach to the library.

7

Installing Software for Capture Professional Non-Scanning Workstations

You can install Capture on workstations that are not attached to scanners. These Capture Professional workstations can be used in the following non-scanning applications:

- Import files into the Capture system for committal (Requires the File Import package, if no scanning package is installed.)

- Perform verification, assembly, indexing, and committal functions on previously-created batches in a distributed processing environment

- Perform post-scan document processing functions, such as bar code detection, patch code detection, or image enhancement with the optional Doc Processing package

By distributing the non-scanning functions to other workstations, you can increase scanner throughput and productivity.
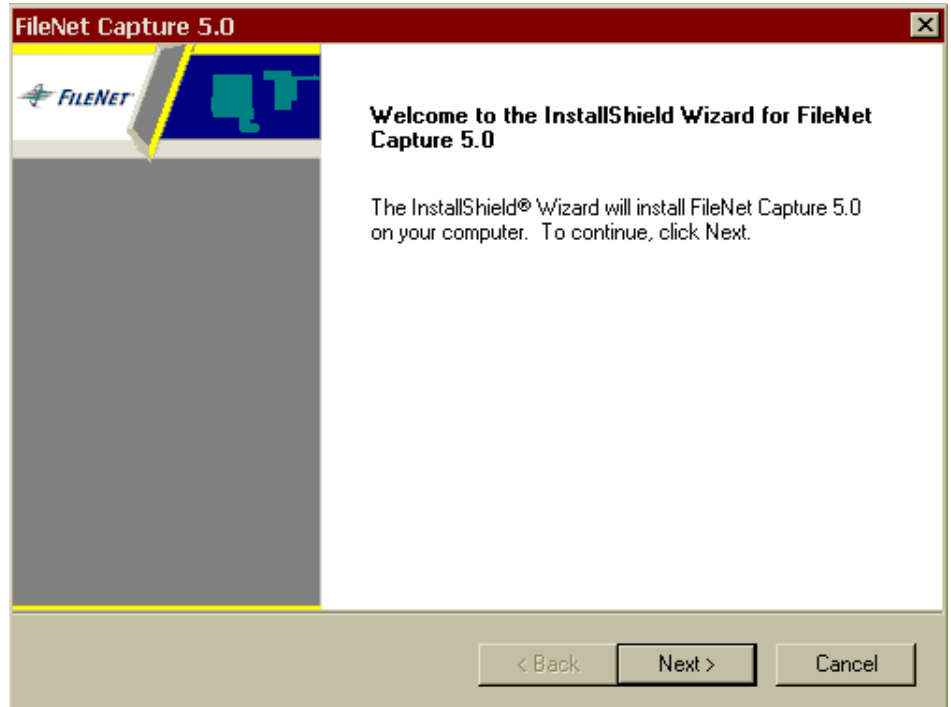
Begin the installation by inserting the Capture CD. If the Capture Setup screen is not displayed on the screen, run Splash.exe.

You can install/uninstall Capture Professional using one of the following methods:
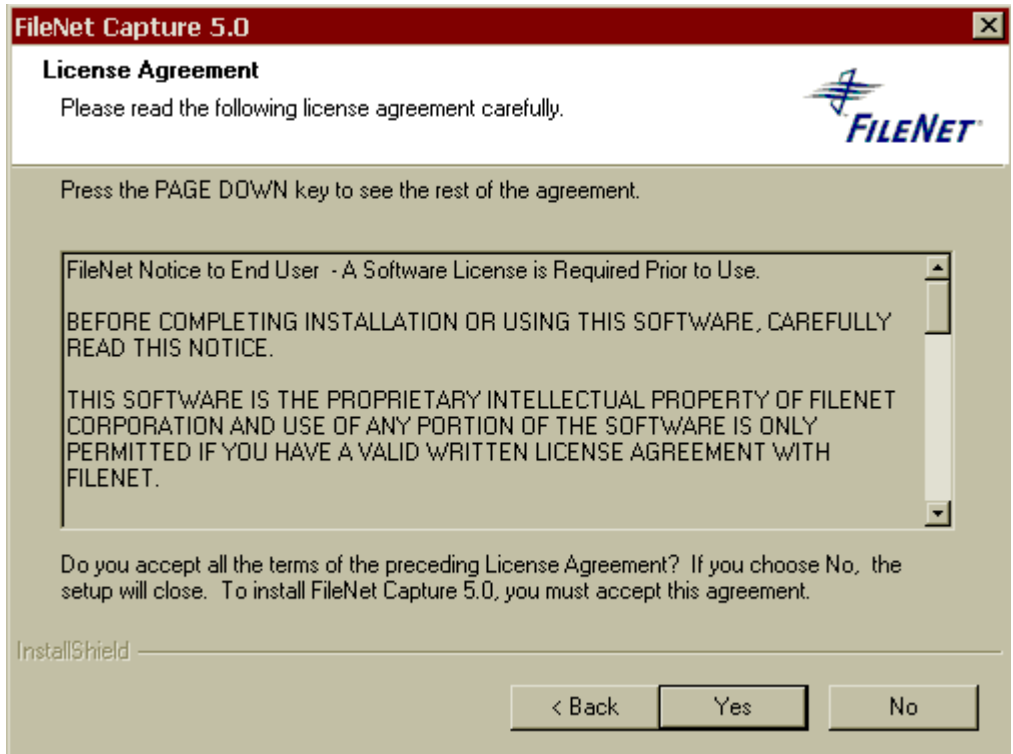
• Normal Capture Installation

• Silent Capture Installation

• Normal Capture Uninstall

• Silent Capture Uninstall
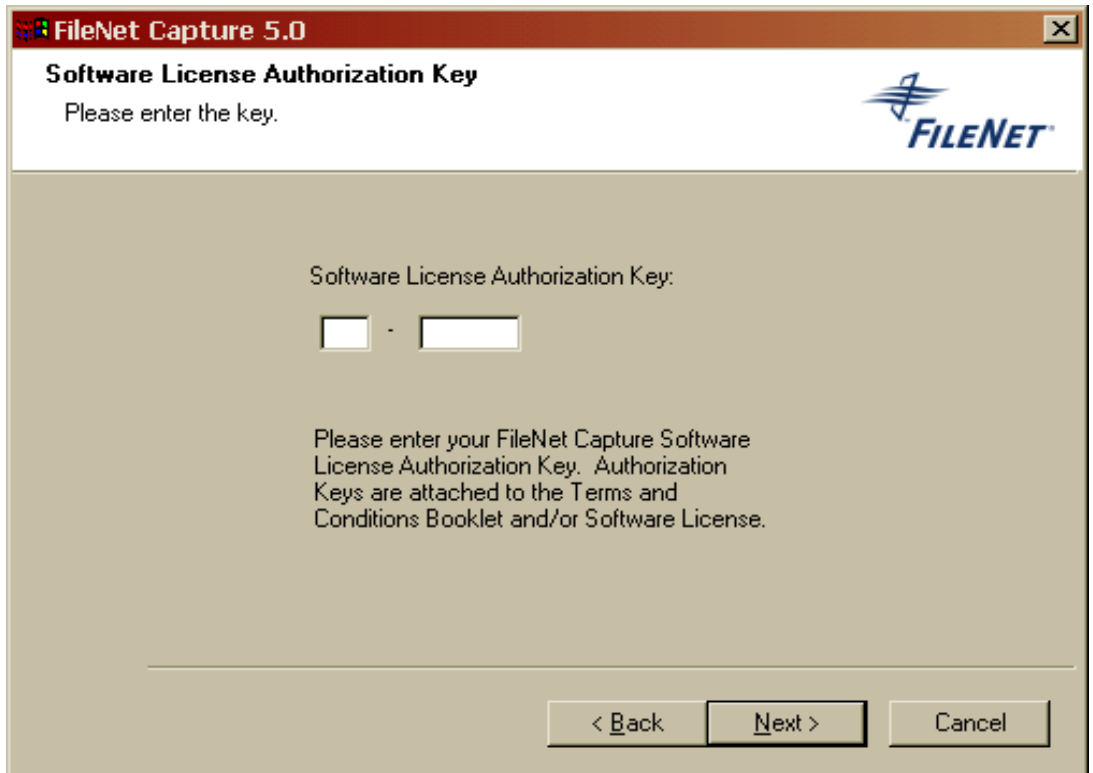
Normal Capture Professional Installation

1   Select **Install Capture (Normal)** from the FileNet Capture Setup screen.

2   Click **Next** to advance through the Welcome screen.

3 Click **Yes** to agree with the Software License Agreement. A copy of the End User Software License Agreement is also available in <u>"Appendix A – Software License Agreement" on page 157</u>.

FileNet Capture 5.0

License Agreement

Please read the following license agreement carefully.

FILENET

Press the PAGE DOWN key to see the rest of the agreement.

FileNet Notice to End User - A Software License is Required Prior to Use.

BEFORE COMPLETING INSTALLATION OR USING THIS SOFTWARE, CAREFULLY READ THIS NOTICE.

THIS SOFTWARE IS THE PROPRIETARY INTELLECTUAL PROPERTY OF FILENET CORPORATION AND USE OF ANY PORTION OF THE SOFTWARE IS ONLY PERMITTED IF YOU HAVE A VALID WRITTEN LICENSE AGREEMENT WITH FILENET.

Do you accept all the terms of the preceding License Agreement? If you choose No, the setup will close. To install FileNet Capture 5.0, you must accept this agreement.

InstallShield

< Back   Yes   No

---

4 Enter the Software License Authorization Key. The Software License Authorization Key determines the scanner support package, and what options are available, if any. Authorization keys are attached to the

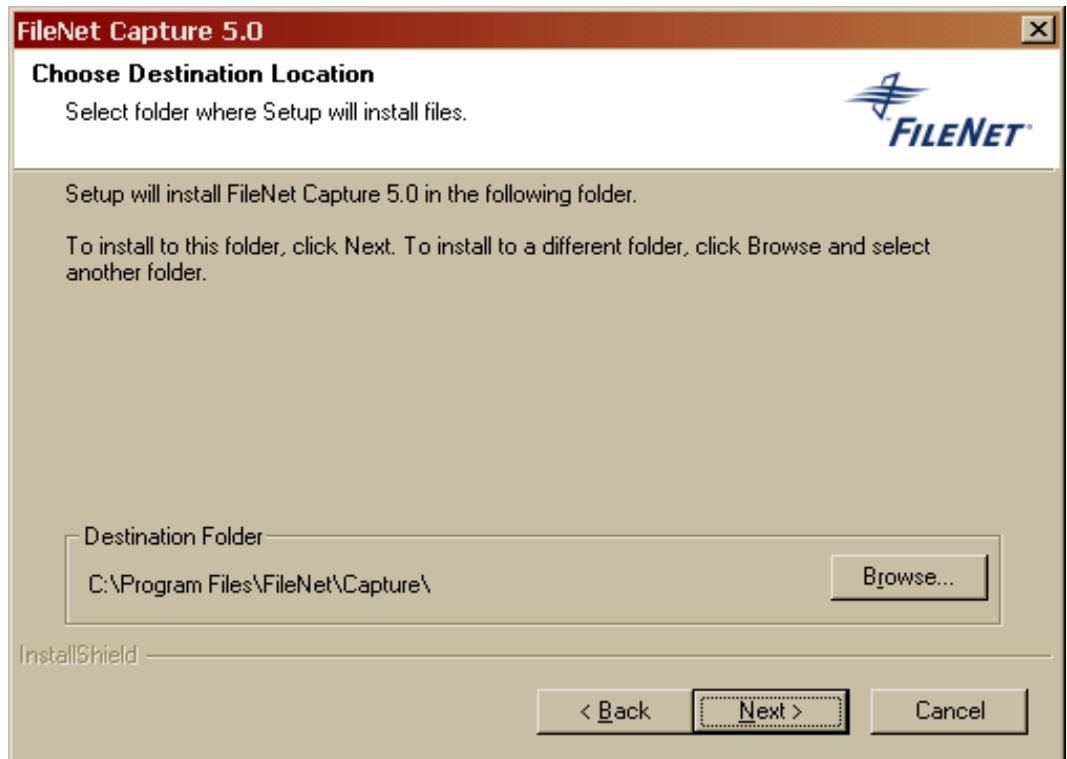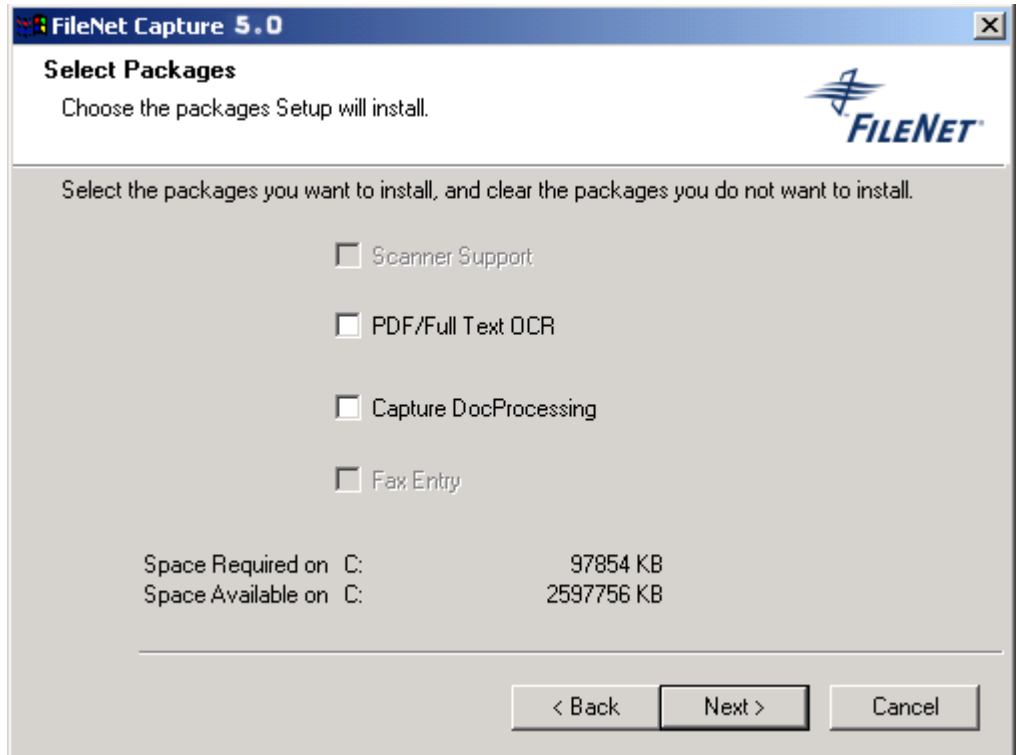Terms and Conditions Booklet and/or Software License. Click **Next** to continue.

5 Choose a file location to install Capture Professional.

The default destination folder is shown near the bottom of the screen. Click **Browse** to select a different directory.
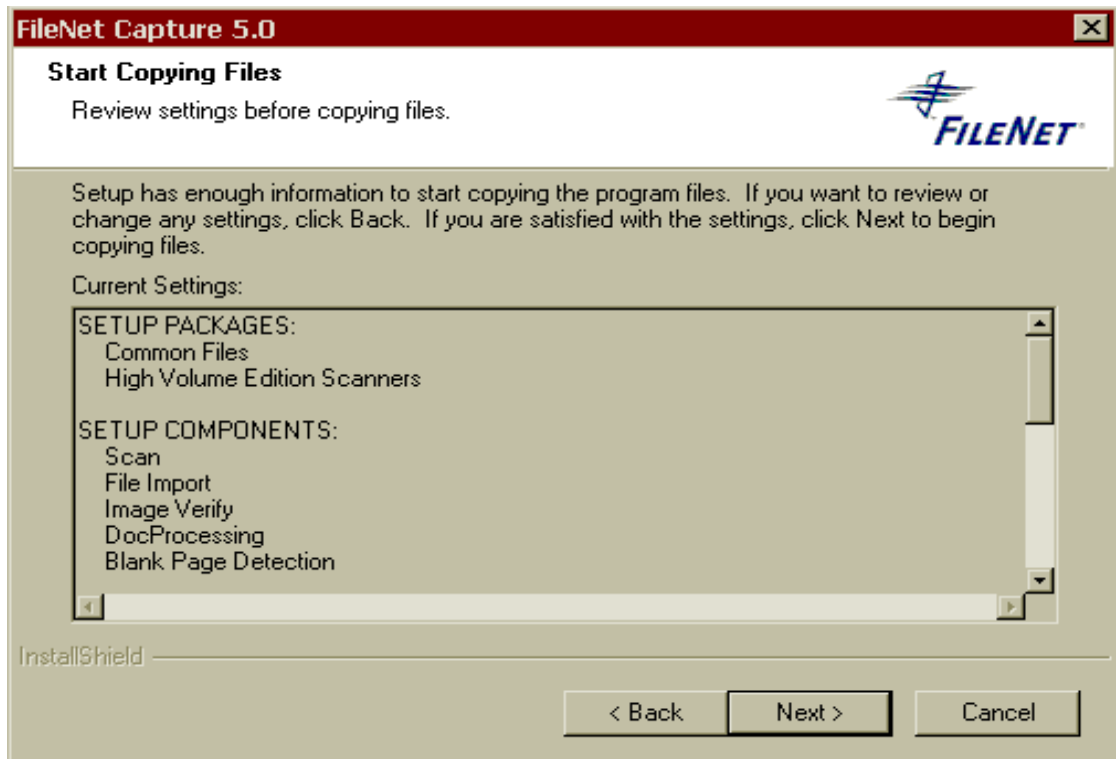
Click **Next** to continue.

6 Specify the packages you are installing.

a Verify that the **Scanner Support** check box is cleared.

b Select the **PDF/ Full Text OCR** check box if you will be installing the optional Full Text OCR package. This package is provided on a separate CD.

c Select the **Capture DocProcessing** check box to install software Doc Processing. Software Doc Processing is provided on a separate CD.

Note You do not need to select this box if you will be using the Doc Process-
ing features provided by a Kofax scanner interface card (hardware Doc
Processing).

7 Click **Next** to continue.

8 On the **Start Copying Files** screen, review the selections. Use the
Back button to go back and change selections, if necessary. Click
Next to continue.

FileNet Capture 5.0   ⊠

Start Copying Files

Review settings before copying files.   *FILENET*

Setup has enough information to start copying the program files. If you want to review or
change any settings, click Back. If you are satisfied with the settings, click Next to begin
copying files.

Current Settings:

```
SETUP PACKAGES:
   Common Files
   High Volume Edition Scanners

SETUP COMPONENTS:
   Scan
   File Import
   Image Verify
   DocProcessing
   Blank Page Detection
```

InstallShield

< Back   Next >   Cancel

---

9   The installation program then installs the selected packages on the system. To abort the installation, click **Cancel**.

10   If you are installing the optional Full Text OCR, continue with .

11   If you are installing the optional Document Processing package, continue with .

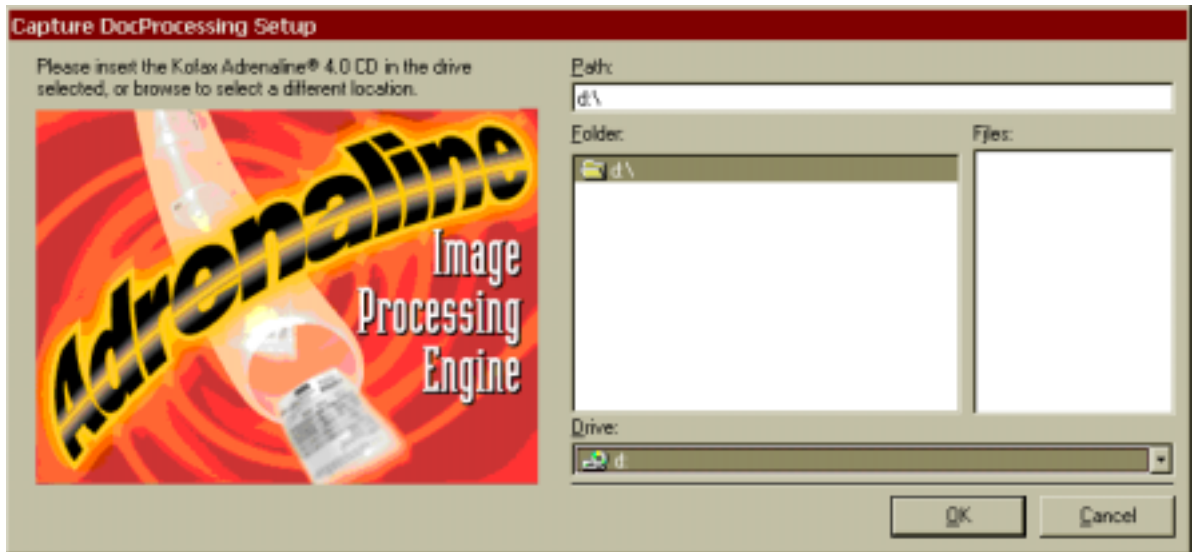**12**   Click **Finish** to restart your computer manually, or the computer will restart automatically in 15 seconds.

When the computer restarts, and after you log in, the Capture installation process resumes and you may see a number of messages while the installer registers the various components.

If you have no more options to install, continue with .

Install the Full Text OCR Software

When prompted, insert the Full Text OCR CD (OCR-2-PDF) to begin the installation.

1   Insert the Full Text OCR CD in your drive and navigate to the drive that contains the CD, using the dialog as necessary. You do not need to specify a folder or file.

Click **OK** after entering the correct drive letter.

The system displays the InstallShield Wizard dialog box and installs Full Text OCR.

2   When the Installation Complete window appears, if you are installing the optional Document Processing package, continue with <u>"Install the Doc Processing Software" on page 131</u>.

If you are not installing Document Processing, continue with the next step.

3   The Setup Complete screen appears. Click **Finish** to restart your computer manually, or the computer will restart automatically in 15 seconds.

When the computer restarts, the Capture installation process resumes and the installer registers the various components.

Continue with <u>"Configuring Capture Manager" on page 143</u>.
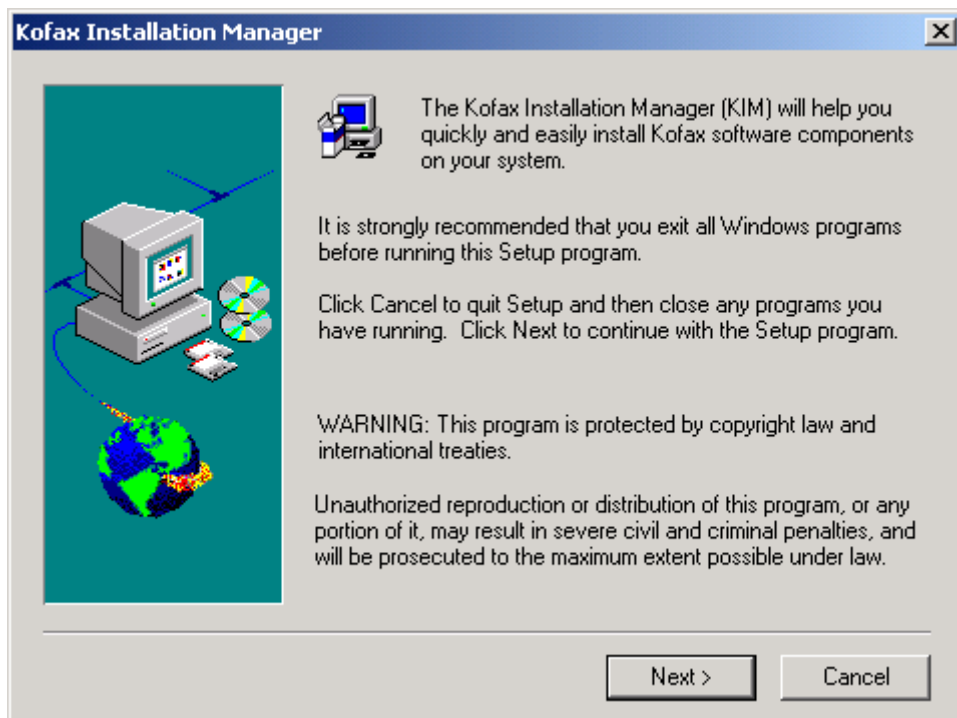
Install the Doc Processing Software

If you selected the option to install Software DocProcessing (also referred to as the Adrenaline software doc processing) during the installation process, setup will display this screen:


1 Insert the Kofax Adrenaline CD in your drive and navigate to the drive that contains the Kofax Adrenaline CD using the dialog as necessary. You do not need to specify a folder or file.

Click **OK** after you have selected the appropriate drive letter from the dialog. The Kofax Setup will create the Installation Wizard to install Adrenaline.

2 When the Kofax Installation Manager screen appears, read the instructions and click **Next** to continue.

3 Verify that the Adrenaline Image Processing Engine is selected for installation. Use **Browse** to change the installation directory from the default shown, if you wish. Click **Next** to continue.
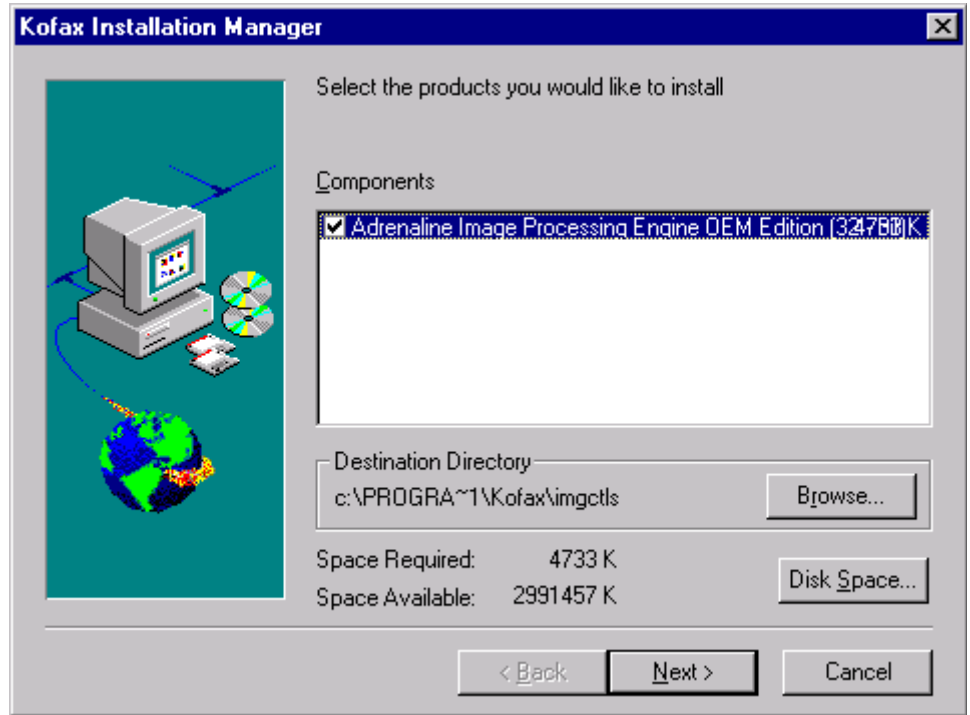
You will see a status bar while the installer copies the files to your system, and then the Kofax Installation Manager screen.

Click **Next** to continue.

4 When the Kofax Finish screen appears, select **Yes** and click **Finish** to restart your computer.
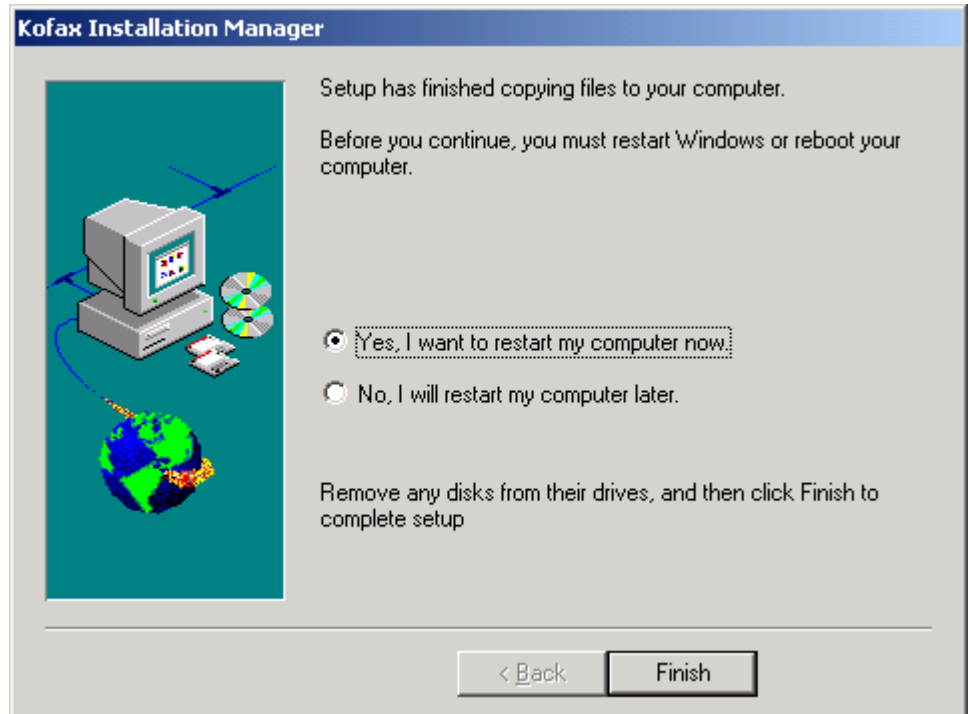
When the computer restarts and you log in, the Capture installation process resumes, and the installer registers the various components.

Continue with .
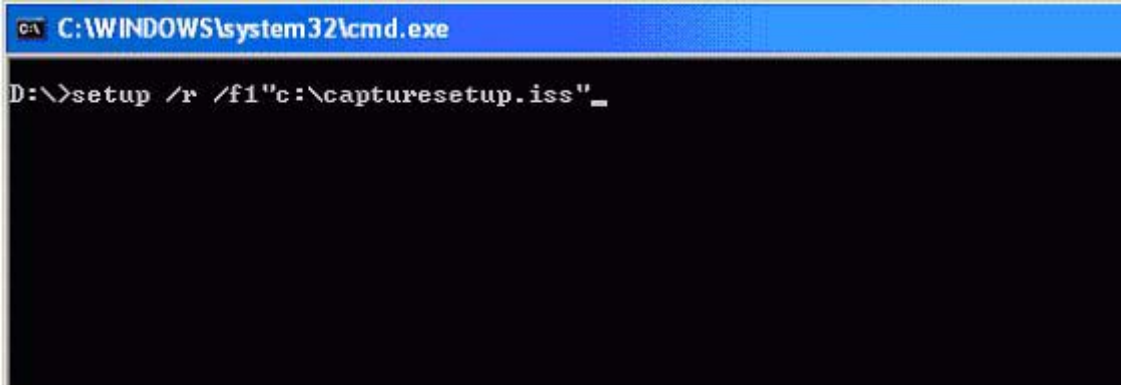
Capture Professional Installation (Silent Mode)

Before you can perform a silent install, you must record a complete install on a single station. All of your install preferences are recorded to a response file as described in "Recording the Silent Install Script". Later you can use the response file to execute a single command and replicate the installation on another station as described in .

Note   The Kofax AIPE (Adrenaline Image Processing Engine) setup does not support silent install. If you are going to install doc processing you must first install AIPE on **each** station.

Recording the Silent Install Script

1   If you will be installing doc processing during the record mode, you must install AIPE first. See .

2   Open a command window and run the following command:

D:\>setup /r /f1"c:\capturesetup.iss"

This command generates a response file capturesetup.iss (or the file name you specify) which contains the installation options you selected. You can specify a folder other than the root folder for the location of this file.

Note   The response file is unique to an installation scenario. The configuration details in the recorded and the replicated systems must be identical. For example, the disk drive selected for the install in the response file must be the same as that used in the subsequent silent installations.

Note   There is no space between the **f1** and the **"c:**.

Note   The response file has to be accessible to each station that requires silent install. It can reside on a shared drive or it can be copied to each station.

3   The system displays the InstallShield Wizard dialog box as it prepares to install Capture. Follow the steps for a normal installation as described in "Normal Capture Professional Installation" on page 122.

4   There are 2 methods for installing Full Text OCR software as part of a silent install.

- **Installing Full Text OCR software as part of the Capture silent install**. With this install method, select the **PDF/Full Text OCR** check box. You must specify a location for the Full Text OCR software CD. The location you specify should be either a network resource or a secondary CD drive on the current computer. The location recorded in this step will be the location used by each of the stations to find the Full Text OCR installation software while in Capture Professional Silent install mode.

- **Installing Full Text OCR software separately.** With this install method, you do **not** select the **PDF/Full Text OCR** check box. You install the Full Text OCR software after the Capture Professional Silent installation is complete. This may be convenient if you do not have a network CD drive available or if your computer does not have two CD drives.

  To install the Full Text OCR software separately from the Capture silent install, from a command window, run

     setup /s

  You must do this from the OCR CD location.

5 Continue with .

6 Continue with to repeat the recorded steps on the next system in silent mode.

Running the Silent Install Script

Before you can perform a silent installation you must have access to the installation instruction data file generated in the Installation Recording mode. See .

1 Copy the response file to the directory of your choice. In this example, we use the root directory.

2 If you are installing doc processing as part of the silent install, you must install AIPE first. See .

3 Open a command window and run the following command (or use the file name you specified):

D:\>setup /s /f1"c:\capturesetup.iss"

```
C:\WINDOWS\system32\cmd.exe

D:\>setup /s /f1"c:\capturesetup.iss"_
```

This command executes the installation recorded in an earlier session.

See instructions for installing Full Text OCR software in the next step.

4 There are 2 methods for installing Full Text OCR software as part of a silent install.

- **Installing Full Text OCR software as part of the Capture silent install**. With this install method, select the **PDF/Full Text OCR** check box. You must specify a location for the Full Text OCR software CD. The location you specify should be either a network resource or a secondary CD drive on the current computer. The location recorded in this step will be the location used by each of the stations to find the Full Text OCR installation software while in Capture Professional Silent install mode.

- **Installing Full Text OCR software separately.** With this install method, you do **not** select the **PDF/Full Text OCR** check box. You install the Full Text OCR software after the Capture Professional Si-

lent installation is complete. This may be convenient if you do not have a network CD drive available or if your computer does not have two CD drives.

To install the Full Text OCR software separately from the Capture silent install, from a command window, run

setup /s

You must do this from the OCR CD location.

5   After the Silent install completes, the computer will restart automatically. After you log in, the Capture installation process resumes and you may see a number of messages while the installer registers the various components.

6   Continue with "Configuring Capture Manager" on page 143.

Log Files

No message boxes are displayed when you install a system in Silent mode. All install information is written to a log file. There are two log files for Capture -- Capture setup and Full Text OCR.

The Capture setup file is CaptureSetup.log and contains the following information:

- product name

- installation destination

- which package the user selected

- installation start time and end time

- components added to Capture Manager

- Error messages such as "Please install Kofax DocProcessing before running Capture Setup in silent mode."

The following is an example of a Capture Setup log file:

```
------------Start of Install on 11-29-2004 15:00:46
Product Name: FileNet Capture 5.0
SILENT MODE
Destination folder:  C:\Program Files\FileNet\Capture\
Capture Record Activator selected.
Begin copying files...
Done copying files.
After reboot at  15:04:10
Added to Capture Manager: scan.ocx
Added to Capture Manager: imageimport.ocx
Added to Capture Manager: ImageVerify.ocx
Added to Capture Manager: kfimageprocess.ocx
```

```
Added to Capture Manager: blankpage.ocx
Added to Capture Manager: ZonalOCR.ocx
Added to Capture Manager: EventMgr.ocx
Added to Capture Manager: Assembly.ocx
Added to Capture Manager: index.ocx
Added to Capture Manager: indexverify.ocx
Added to Capture Manager: Merge.ocx
Added to Capture Manager: commit.ocx
Added to Capture Manager: printfax.ocx
Added to Capture Manager: RecordAct.ocx
Added to Capture Manager: fncaptureviewer.ocx
```

The Full Text OCR log file is CaptureFTOCR.log and contains the following information:

- product name

- start time and end time of installation

- error messages

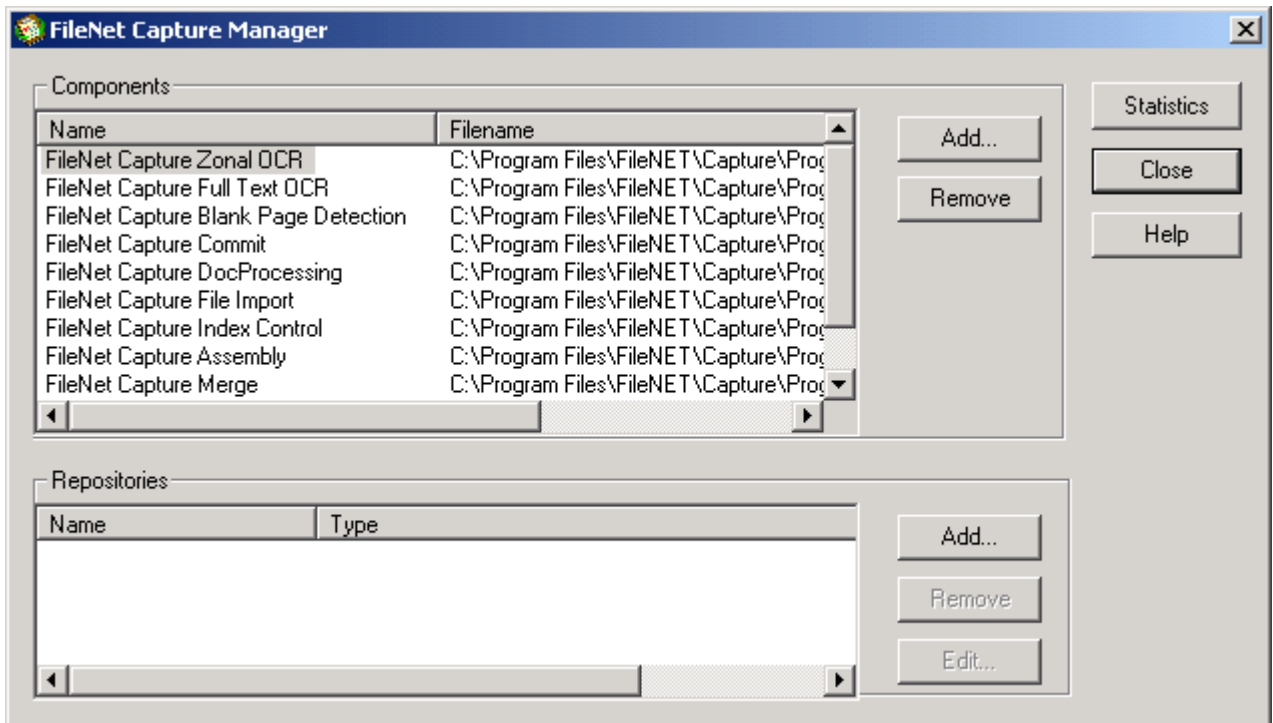The following is an example of a Full Text OCR log file:

```
-------------Start of Install on 1-19-2005 15:50:11
Product Name: FileNet Capture Full Text OCR 5.0
Full Te
xt OCR component is installed successfully.
--------------End of Install on 1-19-2005 15:50:16
```

Configuring Capture Manager

Before you can connect Capture Professional to your repositories, you must add repository session names for each library to your workstation through Capture Manager.
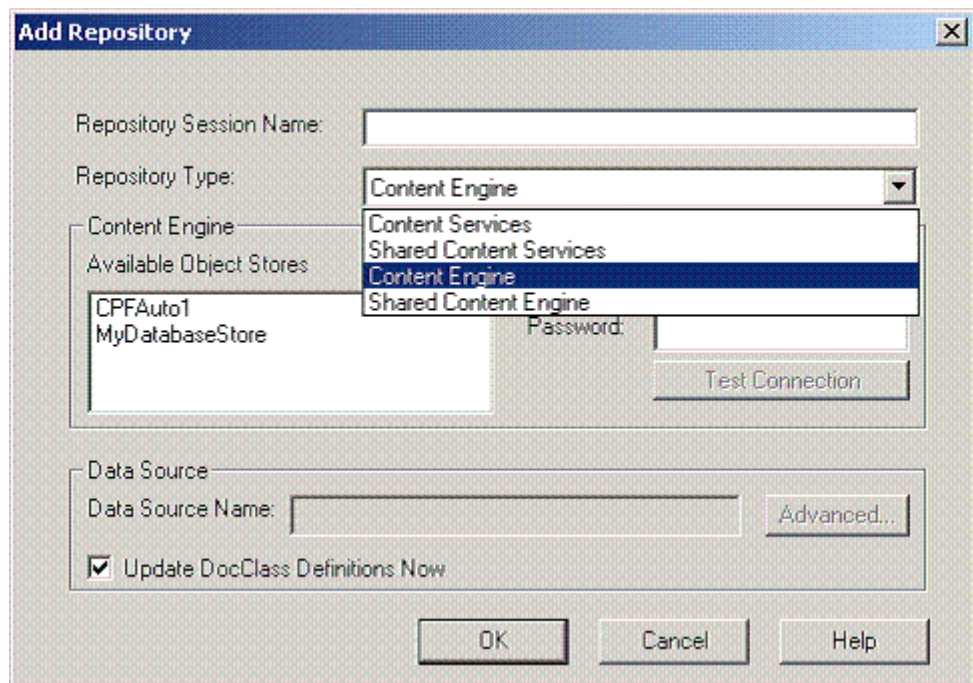
Start Capture Manager

1 From the Windows Toolbar, click on the **Start** button and select **Programs**. Click **FileNet Capture Professional** and then select **Capture Manager** from the sub-menu.

2 The Capture Manager window displays. .

Select **Add** in the Repositories section. The system displays the Add Repository dialog box.

3 Type the repository session name in the **Repository Session Name** field. The repository session name defines an alias for the repository.

Select the repository type from the list in the **Repository Type** field.

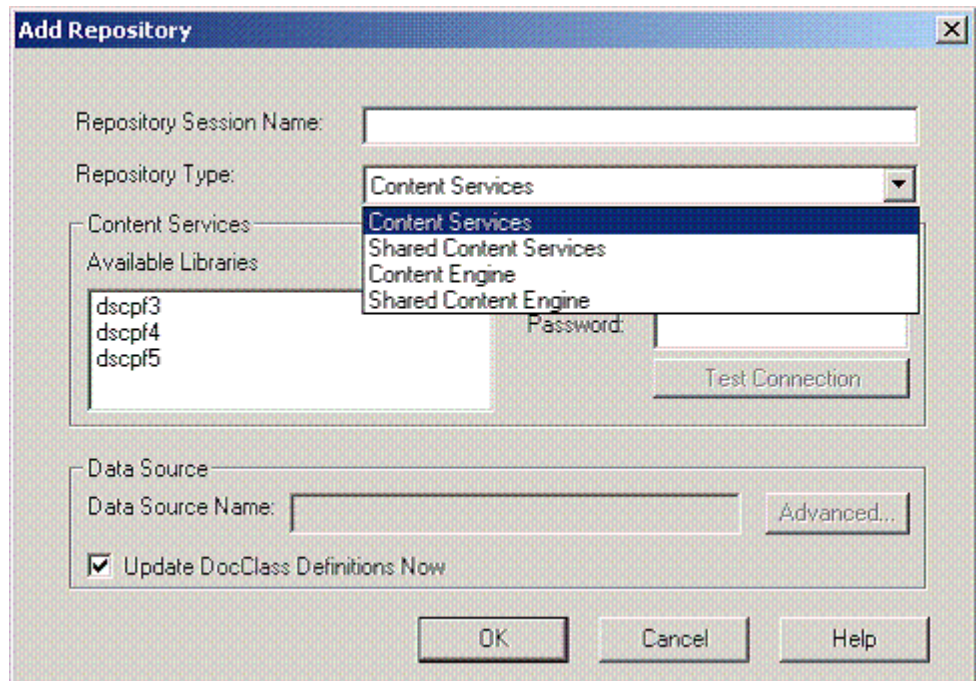For **Content Engine repositories**, the dialog box may look like this:

Select the library for the repository session from the **Available Object Stores** listbox.

If CE Client Connectivity has not been configured, selecting a CE repository displays the following error message:

Selected repository types requires installation of Content Engine Client Connectivity software.

For more information on Content Engine Client Connectivity, see "Establishing Content Engine Client Connectivity" on page 33.

For **Content Services repositories**, the dialog box may look like this:

If IDM desktop has not been installed, selecting a CS repository displays the following error message:

Selected repository types require installation of FileNet IDM Desktop.

4   Select an Available Library or Object Store.

5   Type the user name in the **User Name** field to automatically log in to the library or object store when Capture starts. If you leave this field blank, the operator will be prompted to enter the information each time Capture starts.

If you entered a user name, type the associated password in the **Password** field. If you leave this field blank and a password is required, the operator will be prompted to enter the password each time Capture starts.

For shared repositories only, type the **Data Source Name** configured in Microsoft's ODBC Data Source Administrator utility.

Note   If you are using Windows NT authentication, these fields will be grayed out.

Click **OK** to add the repository.

6   When you have configured all the necessary repositories, click **Close**.

To verify your installation, continue with .

Testing the Capture Professional Installation

When you have completed the software installation process, use the following procedure to test the installation.

Start Capture Professional

1   From the Windows Toolbar, click **Start** and select **Programs**. Select **FileNet Capture** then select **Capture Professional** from the sub-menu.

2   Enter a user name and password if prompted to do so.

3   When the program loads, you should see three panes on the main Capture Professional window. The first pane (upper-left portion of the screen) is referred to as the Tree view and is similar to the Windows Explorer. You should see at least one node in the Tree view, representing an available repository. (You should always see the Local Repository and any other available repositories.)

4   In this procedure, you will verify that Capture was installed properly by connecting to a repository and opening a batch there. This assumes that you have another scanning workstation that can create a batch on the repository and populate the batch with pages.

5   Open the repository in the Tree view. Your Tree view pane should look like this (with different batch names):
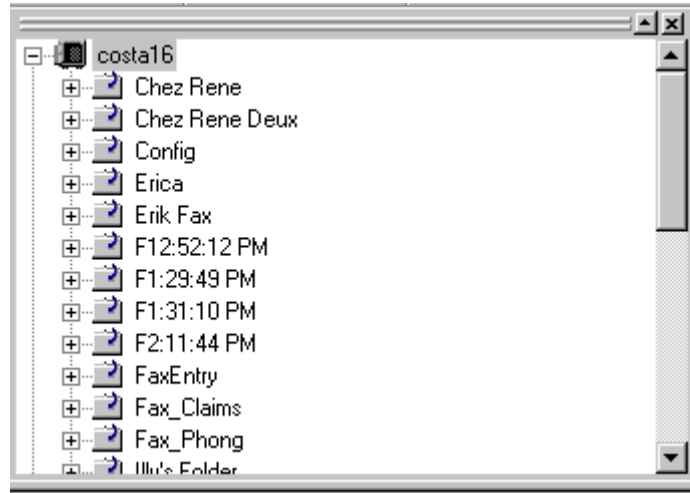
6   If permitted by your system administrator, you should be able to ex-
pand the batches and folders and display the contents of the batches
on the repository.

8

Upgrading Capture From a Previous Release

This Appendix provides information for users and system administrators who are converting Capture workstations from an earlier release of Capture to the 5.0 release.

Note You can display the software release version and patch level from the About box. To display the About box, select the **Help** option from the main menu, then click **About**.

What's New in the Capture 5.0 Release

Records Management Support

Records Manager (RM) is an add-on component of the FileNet P8 suite of products. Within the Capture Professional environment, records management is handled in the Record Activator component.

Support for Oracle version 9i.2

Capture 5.0 includes support for Oracle 9i.2 for shared repositories and shared statistics databases.

Silent Installer and Uninstaller

You can install and uninstall Capture Desktop and Professional in both normal or silent mode.

OCR Enhancements

Capture 5.0 includes several OCR enhancements including the ability to specify over 200 OCR zones per document.

Statistics Performance Enhancements

You can enable collection of statistics on select components.

Upgrading Scanner Drivers and Runtime Files

Kofax-Interfaced Scanners

Note To reinstall the Kofax Adrenaline Image Processing Engine (AIPE), you must uninstall the current version. Once AIPE has been reinstalled, you must reselect your scanner.

The initialization of Doc Processing can be affected by some external factors such as Kofax AIPE setup, Capture setup, and Kofax source configuration.   To avoid problems with Doc Processing initialization, the user should reselect the Kofax source for Doc Processing after any of the following actions:

- Installation or upgrade of Kofax AIPE software

- Installation or upgrade of Capture software

- Modification or removal of the selected Kofax source of Doc Processing by running the KSM program in the Control Panel.

If you are installing a new Kofax scanner interface board, install the Kofax configuration software and runtime files at the same time you install the board. Refer to the Kofax documentation for complete instructions.

If you are using the same board that you used for a previous Capture release, update the Kofax runtime files for that board before you install Capture 5.0.

Pixel Translations (Scan/ISIS or SCSI) Scanners

Capture 5.0 automatically installs Pixel Translations scanner drivers for many popular scanners. After Capture is installed:

- For **Capture Professional** - Select a batch, and then select **Tools** from the menu bar. Select **Configure**, and then **Scan**, to display the scanner configuration property page. Click the **Select Scanner** button to display the list of available scanners.

- For **Capture Desktop** - Select **Options** from the menu bar, and then select **Select Scanner** from the list to display a dialog box that includes a list of the available scanners.

In addition to the scanners supported directly with Capture, you may use Pixel Translations drivers included with specific scanners, or those provided directly by Pixel Translations. Refer to your scanner manufacturer's web site for updates and/or additional information. (Capture 5.0 is compatible with any ISIS driver that is based on the Pixel Translations toolkit.)

For more information, please see the Scanner Support Policy in the Customer Service & Support area of the FileNet Web site.

After the scanner and driver are installed and the scanner is tested, install Capture.

Upgrading Fax Entry Workstations

If you have enabled the journal log on your fax station you must delete the old log (FEJrn.log by default) from \FaxEntry\Journal directory before upgrading your fax station. If you want to save the data in the file, you should either commit the log file or save it on another location. This is necessary since journal log files between some Capture releases are not compatible and may cause an error when the new log entries are added to the old log file.

See the *Converting to RightFax for FileNet Capture and Print* Tech Note for more information.

Upgrade Procedure - Capture Professional 4.x to Capture Professional 5.0

Generally, if you are upgrading from Capture Professional 4.x to Capture Professional 5.0, you do **not** need to uninstall Capture Desktop 4.x.

However, there are certain restrictions when upgrading from one Capture package to another.

• You cannot upgrade directly from Capture Desktop to Capture Professional. You must first uninstall Capture Desktop before upgrading to Capture Professional.

• If you are upgrading from Capture Professional 4.x to 5.0 and your new setup contains fewer components, you must uninstall the Capture 4.x package before installing Capture 5.0. For example, if you have Capture Professional for Hi-Volume Scan v4.1 installed and would like to upgrade to Capture Professional for DocEntry v5.0, you need to uninstall Capture 4.1 before installing Capture 5.0.

Converting Existing Systems and Hardware

If you are installing **Capture Professional 5.0** on a workstation that is running a 4.x release of Capture, do the following to preserve any local settings, templates, and capture paths:

1   To make a backup of your local repository, copy the associated .mdb file to a safe location.

2   If you are using the local repository for purposes other than a backup, copy all of the customized capture paths, settings, and templates located there to a safe location.

Note   Your local repository will be deleted if you uninstall Capture 4.1, and all customized capture paths, settings, and templates will be lost if they are not backed up.

3   Install Capture 5.0.

Upgrade Procedure - Capture Desktop 4.x to Capture Desktop 5.0

Generally, if you are upgrading from Capture Desktop 4.x to Capture Desktop 5.0, you do **not** need to uninstall Capture Desktop 4.x.

However, there are certain restrictions when upgrading from one Capture package to another.

• You cannot upgrade directly from Capture Professional to Capture Desktop. You must first uninstall Capture Professional before upgrading to Capture Desktop.

• If you are upgrading from Capture Desktop 4.x to 5.0 and your new setup contains fewer components, you must uninstall the Capture 4.x package before installing Capture 5.0.

Converting Existing Systems and Hardware

If you are installing **Capture Desktop 5.0** on a workstation that is running Capture Desktop 4.x, do the following to preserve any data, settings and templates currently on the local workstation before proceeding:

1 Finish all processing and add all batches to the appropriate library.

2 To back up any custom settings, folders, or batches associated with your libraries, make a copy of the database ([LibraryName]DS.mdb) file for each library and store it in a backup folder.

3 Install Capture Desktop 5.0.

4 You will be asked whether or not you want to use the previous library file. This file contains the folders, batches and a link to customized set-

tings for the corresponding library. (You will get a separate prompt for each repository that you had configured for the previous installation.)

5   Restart your workstation when prompted to do so.

Note   If you choose Yes to use the existing repository, all of your custom folders, batches, and settings files should be retained.

If you choose not to use the previous version, all customized folders, batches and settings files will be overwritten by a blank database file.

6   If you accidentally initialized the database, or if your customizations are not available for some other reason, you can restore the library database file by using the backup of the file you copied in step 2.

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