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## Bluelake Software – Image Express 3.0

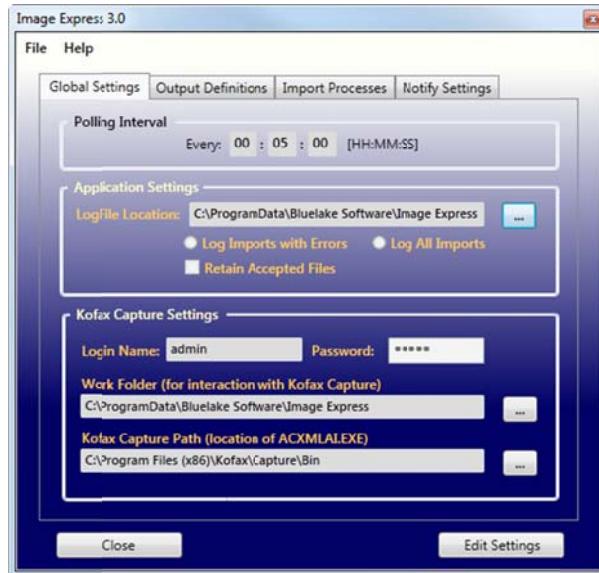
### Overview

*Image Express™* is a tool for automating the import of electronic documents (TIF, PDF, etc) from network folder locations, into defined Kofax Capture Batch classes. It is particularly useful for routing documents that were captured from network-attached copiers and multifunction devices into Kofax, for advanced processing.

There are a number of configurable settings that control the behavior of *Image Express™* as it manages the folder polling and Kofax import process. For instance, descriptive information about the location a given document came from, as well as its original file name, file date, etc, can be mapped to specific Kofax Batch fields.

Once configured, it runs as a service, polling one or more network folder locations at scheduled intervals for electronic files destined for Kofax Capture processing.

*Image Express™* is available for demo download from [www.bluelake.com](http://www.bluelake.com). Licensing is on a per-processing station basis.



Please contact Bluelake Software at [sales@bluelake.com](mailto:sales@bluelake.com) or (888) 374-222- x201 for further information or to purchase a permanent license.

**Application Requirements:**

Supported Operating Systems: Windows XP, Windows 7, Windows Vista, Windows Server 2003, Windows Server 2008.

Requires .NET Framework 4.0 or above (will facilitate download and installation if not installed)

*Image Express™* must be installed on a workstation or server that has an available Kofax Capture Full User license installed. It can run concurrently with other Kofax Capture modules such as Recognition, Release, etc. Under the Kofax Capture framework, all Kofax AC modules running on a single machine can share a Full user license. In a standalone Kofax AC installation, *Image Express™* is installed on the standalone Kofax processing station.

Compatible with Kofax versions 5.x through 9.x

**Application Installation & Configuration:**

To install, download and run the installer available at <http://www.bluelake.com/Products> under the *Kofax-Related Apps and Utilities* section.

After installation, configuration consists of specifying **Global Settings**, such as the polling interval and application log file settings, defining **Output Definitions**, which define how electronic documents are handed off to Kofax, and **Import Processes**, which define the polling location and control the actual processing of documents, tied to an Output Definition. **Notify Settings** can also be configured to send email notifications in the case of an application shutdown.

The general setup sequence is as follows:

1. Configure Global settings on the **Global Settings** tab. This includes the polling interval, location of the application log file, location of the Kofax “Bin” directory, and login settings (if applicable) for Kofax Capture.
2. Configure at least one Output Definition on the **Output Definitions** tab. An Output Definition designates how *Image Express™* will interact with an Ascent Capture Batch Definition. For instance, documents can be handed off to Kofax as a “batch”, in which Kofax recognition will be used for document separation and form recognition, or as documents, in which each original electronic file is treated as a discrete document of a specified Form Type in Kofax. Output definitions also provide for mapping information about each electronic import file to Kofax Batch fields. For instance, the original file name, file date or date + time, or the descriptive location of where a file came from – for instance “3<sup>rd</sup> Floor Copier”. An Output Definition may be referenced by more than one Import Process.
3. Configure at least one Import Process on the **Import Processes** tab. An Import Process specifies the actual windows network folder location that will be polled (mapped or UNC), as well as the file types (TIF, PDF or both) that will be included in the polling. The Import Process also includes and provides additional Descriptive labels that can be forwarded to Kofax about the polling location. It also contains settings that limit the size of batches sent to Kofax, based on the Number of Files or the cumulative size of files accessed within each polling interval. An Import

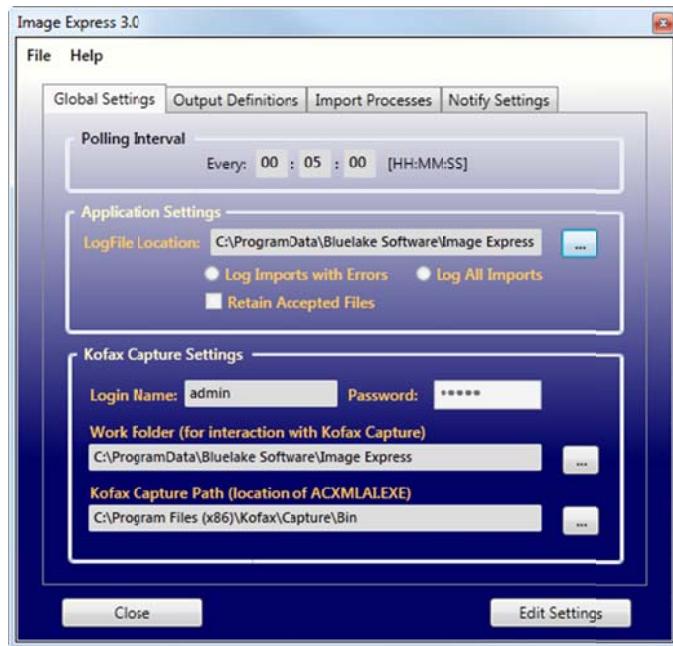
Queue also designates the Output Definitions that will be used when sending files to Ascent Capture.

4. (Optional) On the **Notify Settings** tab, provide email configuration information (SMTP Settings).

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## Configuring Global Settings



The Global Settings tab establishes overall processing parameters for *Image Express*™. Click on “Edit Settings” to make changes to existing settings, and be sure to “Save Settings” when complete.

### Polling Interval

The polling interval is expressed in Hours, Minutes & Seconds in the form HH:MM:SS. The example above polls the folders specified in the Active profiles every 5 minutes. The polling interval should be set to a value which allows processing of the expected volume of files before the next polling interval, though there is handling within *Image Express*™ to confirm that a prior polling interval’s activities are completed before the next polling interval is initiated.

**Note:** In a future Enterprise version, Polling Intervals can be specified individually for each Import Process.

### Application Settings

#### **Log File Location**

*Image Express*™ writes startup and shutdown messages to the Windows Application Event log. In addition, *Image Express*™ writes more detailed processing information to a separate text file. The default location of this file is the Application Data directory on the local machine, which is C:\ProgramData\Bluelake Software\Image Express\ImageExpress30.log (Server 2008, Windows 7) or C:\Documents and Settings\All Users\AppData\Bluelake Software\ImageExpress30.log (Windows XP)

#### **Log Imports with Errors / Log All Imports**

You can opt to only track Error events in the log file (“Log Imports with Errors”) or choose verbose logging which logs activities for successful imports as well (“Log All”) by clicking on the appropriate option.

### **Retain Accepted Files**

By default, only files that encounter an error on Import into Kofax Ascent Capture are saved in a REJECTED folder, beneath the specified Kofax Folder location (see below). However, checking the “Retain Accepted Files” option will cause all files to be saved after import, including successful imports.

Reasons for file rejection include invalid image file formats, network issues in reaching a polling or output location, Kofax licensing issues, Kofax configuration problems, or issues with user profiles and security being enabled without providing proper Kofax login information to *Image Express*™.

### **Ascent Capture Settings**

#### **Login Name/Password**

If user profiles are enabled in Kofax Ascent Capture, a login name and password are required for *Image Express*™ to login to Kofax. In addition, the user login specified for *Image Express*™ must be granted rights to the Scan Queue as well as to the individual Kofax Batch Definitions referenced in any active Output Profiles.

#### **Work Folder Location**

*Image Express*™ creates several processing folders beneath the specified Work Folder location. These folders are called ACCEPTED, REJECTED, IMPORT and CONTROL. The IMPORT and CONTROL folders are work folders used by the *Image Express*™ process. The ACCEPTED and REJECTED folders contain processed files. The ACCEPTED folder will remain empty unless the Retain Accepted Files option under application settings is checked.

Click the browse  button to navigate to a mapped folder location, or manually provide a UNC path (see performance note below).

For best performance, specify a **Work Folder Location** that is on the same machine on which *Image Express*™ is installed. This will minimize any extra bandwidth needed to copy image files to additional network locations.

#### **Kofax Capture Path**

*Image Express*™ interacts with the Kofax Capture XML Import module (ACXMLAI.EXE) and needs to know the path to the Kofax ACXMLAI.EXE file. Depending on the type of Kofax installation (network or standalone) and whether the Image Express process is running on the Kofax Server or another workstation, this location will vary.

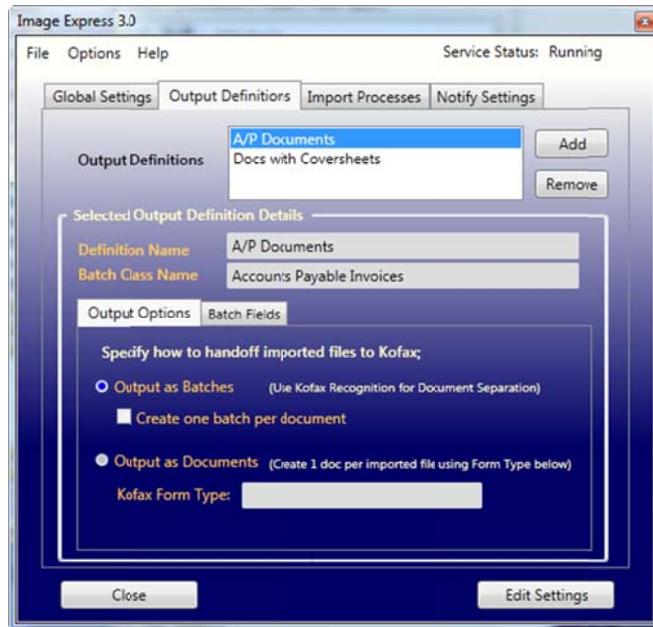
In a standalone or server-based installation, the usual location would be Program Files\Kofax\Capture\Bin. In a networked installation where *Image Express*™ is running on a separate machine from the server, the ACXMLAI.EXE file will be found in the CaptureSV\Servlib\Bin folder.

Click the browse  button to browse to a mapped folder location, or manually provide a UNC path in the case of a network install.

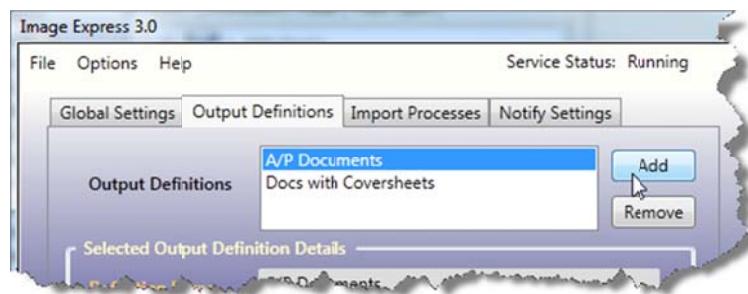
**Click Save Settings to save Global Application Settings BEFORE moving on to the other tabs**

## Configuring Output Definitions

An Output Definition references a Kofax Batch Class, and establishes how *Image Express™* will interact with the Kofax Batch Class. The Output Definitions tab allows configuration of one or more Output Definitions. Since each Import Process requires an Output Definition, at least one Output Definition must be defined to *Image Express™* for any folder polling to take place.



Click on “Edit Settings” to make changes to existing settings, and be sure to “Save Settings” when complete. To define a new Output Definition, click “Add”.



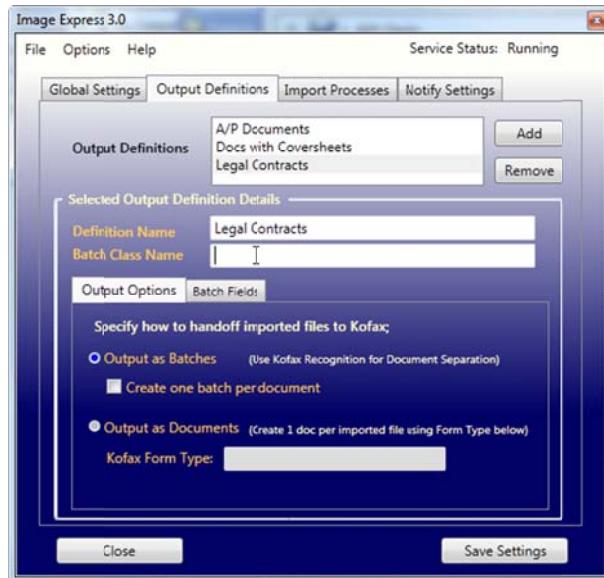
Provide a descriptive name for the Output Definition and select OK:



An Output Definition name should be more reflective of the properties of the documents as they are to

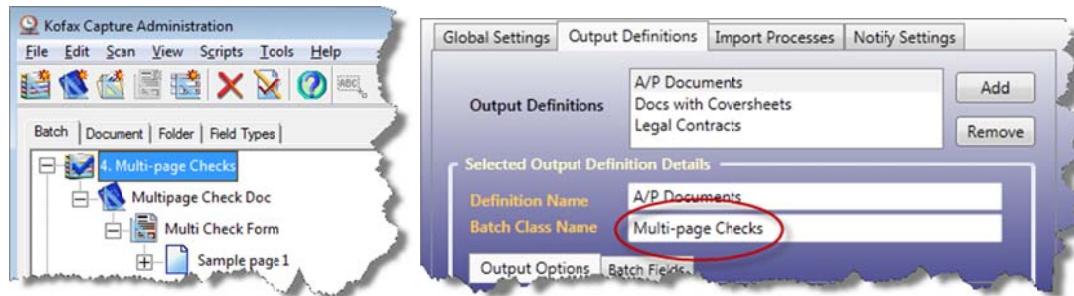
be delivered to Kofax, rather than the polling location to which it will be assigned, since an Output Definition may be assigned to multiple Import Processes. For instance, you might be polling multiple folder locations (via multiple Import Processes) and directing them to the same Form Type in Kofax by referencing the same Output Definition.

Configuring Values on the Output Definitions Tab:



### Batch Class Name

Provide the exact name of the Kofax Batch Definition, as it appears in the Kofax Administration Module “Batch” tab level as shown below. We will use “Multi-page Checks” as an example:



### Output As Batches / Output as Document options:

When files are imported into Kofax Ascent Capture by *Image Express™*, they can be imported in two ways:

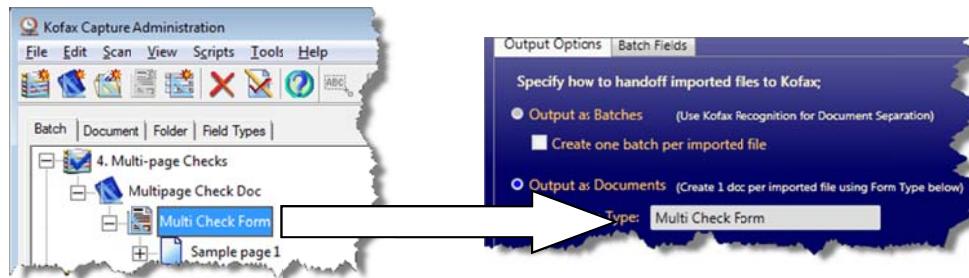
- 1) As Batches – Where identification of each document and form type will be determined by subsequent processing in Kofax Capture – i.e. by Recognition or Xtrata processing or manual identification in Quality Control;

#### Create One Batch Per Imported File

If *Create One Batch Per Imported File* is checked, each individual file pulled from the polling

location will be handed off as a separate batch within Kofax. This option is useful if the electronic files are large, containing multiple documents.

- 2) As Documents – Each individual electronic file imported will be handed off to Kofax as a discrete document, of the form type specified, as illustrated below with the form type “Multi Check Form”.



### Batch Fields

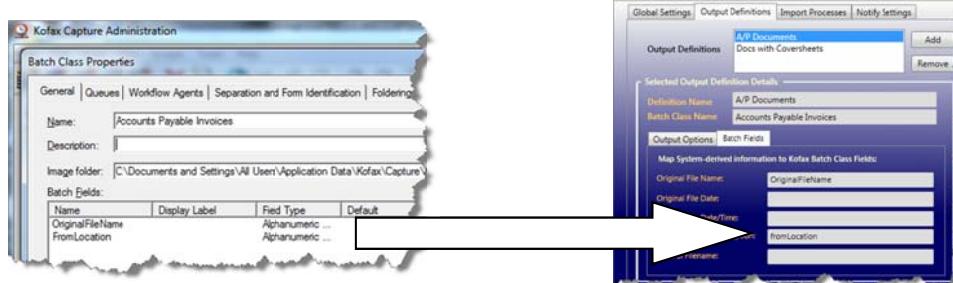
There are 5 “system” values available within *Image Express™* that can be assigned to Batch-level fields within Kofax.

System Value	Description
Original File Name	The name of the file as it existed in the polling location.
Original File Date	The date of the file as it existed in the polling location.
Original File Date/Time	The time of the file as it existed in the polling location.
Import Location	The “Location” value provided in the Profile definition.
Control FileName	The name of the file as it was known to Kofax Capture.

(Within Kofax these Batch Fields can be pulled down to the individual Document Class field level by setting Document Class default values equal to the Batch Field values).

The usefulness of these fields may vary according to the combination of settings selected for the Output as Batch vs. Output as Document Settings, and/or the “Create One Batch per Document” setting.

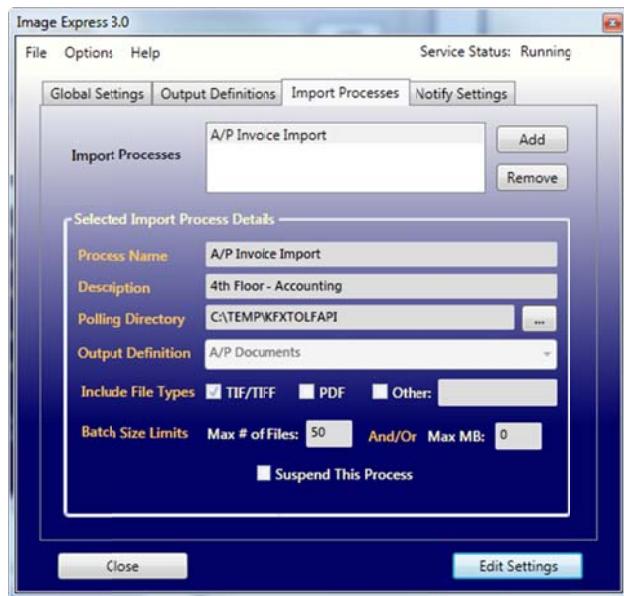
To assign any of these values, provide the EXACT index field name as it is defined in the Properties of the Document Class with Kofax Capture, as shown below:



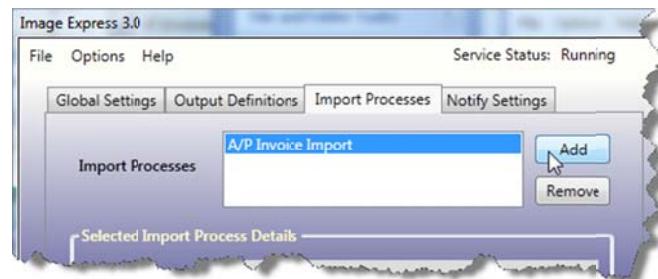
**Click Save Settings to save the current Output Definition Settings BEFORE moving on to the other tabs**

## Configuring Import Processes

An Import Process defines a windows network polling location, with additional attributes and options applied to it.



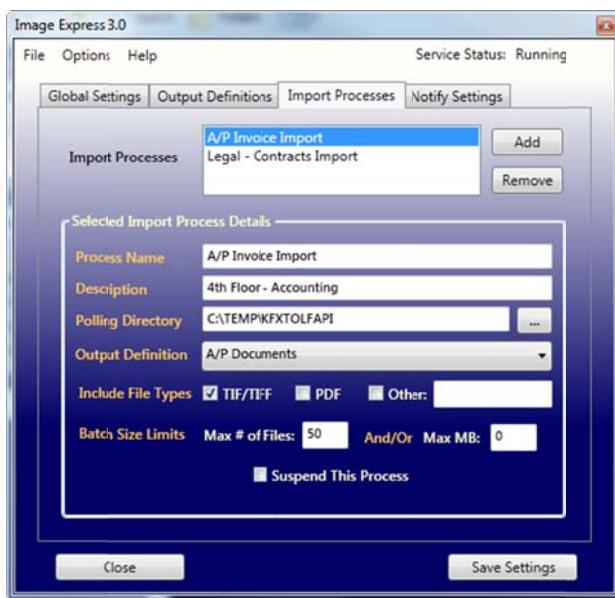
Click on “Edit Settings” to make changes to existing Import Process settings, and be sure to “Save Settings” when complete. To define a new Import Process, click “Add”.



Provide a descriptive name for the new Import Process and select OK:



### Configuring Values on the Import Processes Tab:



#### Process Name:

Provide a descriptive Name for the Import Process, keeping in mind an Import Process is closely tied to a polling location on the Windows network. For example purposes, we have called one “A/P Invoice Import”.

#### Description:

Provide a descriptive name for the polling location – i.e. “4<sup>th</sup> Floor - Accounting”. This value is required and works in conjunction with an Output Definition to pass descriptive source location information for each document that is created in Kofax.

To pass this information to Kofax requires the following actions:

- 1) Configure an Output Definition that has a valid Kofax Batch Class Field Name configured in the “Import Location Description” option on the Output Definitions, Batch Fields tab. (see Output Definitions, Batch Fields, Page 8)
- 2) Assign that Output Definition to an Import Process.
- 3) Within Kofax, to access the value at the Document Class field level simply add a Document Class field and set its default value to be the Batch Class field name.

#### Polling Directory:

Click the browse  button to browse to a mapped folder location, or manually provide a UNC path in the case of a network install (for example: \\server01\Documents\Out)

**\*\* Important Note:** The account under which the *Image Express* Service will run MUST have rights to access the polling folder on a Read/Write basis. If the polling location is on another machine, the account login for the *Image Express* 3.0 service needs to be changed from the default “LocalSystem” account to a domain account with access to the polling folder. To change this account, go to Services,

locate the *Bluelake Image Express™* service, select the Log On tab, and provide a domain user account with rights to this folder.

In addition, make sure this account also has the right to Log On as a Service. To do this, go to *Administrative Tools, Local Security Settings* and select Local Policies/User Rights Assignment. On the right pane, select the “Log On As a Service” item, right click, select Properties, and make sure the domain user account specified for *Bluelake Image Express™* is included in the list of users.

**Output Definition:**

Select a defined Output Definition to associate with this Profile. The defined Output Definition will provide for mapping of system values such as “Description”, original import file names, etc. to the Kofax Batch Class.

**Include File Types:**

Check one or more entries for TIF/TIFF, PDF, or Other file types. If other file types is checked, a value MUST be provided in the “Other” box, consisting of one or more filename patterns separated by commas. For instance “\*.jpg,\*.bmp” as shown below.



Please consult the Kofax support site for a list of all files types acceptable to Kofax.

**Batch Size (# of files) / Batch Size (in MB):**

It is possible and in fact advisable to limit the size of batches forwarded to Kofax. There are two options for doing this:

- 1) Based on the number of files per batch, OR
- 2) Based on the cumulative size of files in MB.

At each polling interval, all electronic documents meeting the specified file type criteria will be converted to live Kofax Batches. If size limits are specified, a new Kofax Batch will be created each time the particular limit is reached.

If neither value is provided, the system will default to 50 files per batch, with no limit on cumulative size per batch in megabytes.

If both values are provided, whichever measure is met first will govern the cutoff for a particular batch.

To turn off batch size limits, set both values to zero.

**Suspend This Process:**

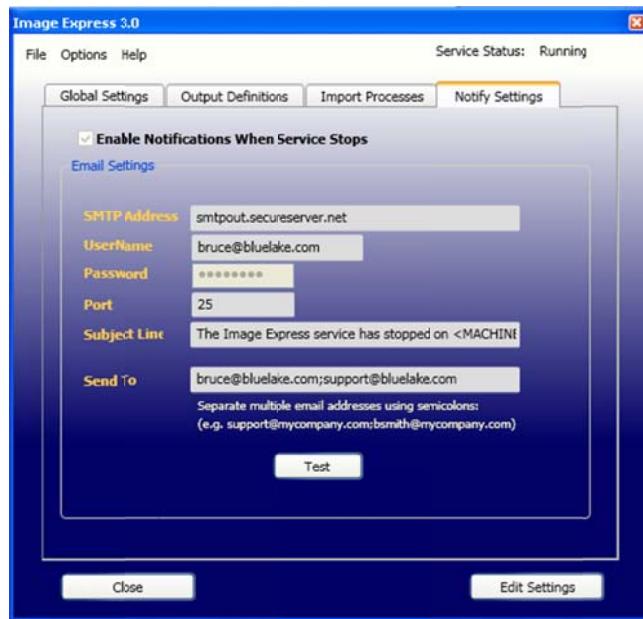
Checking on this value will make the selected Import Process inactive (once the change is saved).

**Click Save Settings to save the current Import Process Settings BEFORE moving on to the other tabs**

## Configuring Notifications

There are certain conditions outside the control of Image Express when Fatal Errors might arise and the Image Express service needs to be stopped. For instance, if a network folder that is specified as a polling folder becomes unavailable while processing a given batch, in which case, post-batch processing such as removing the processed files from the Import location cannot take place. In order to avoid duplicates being imported into Kofax, the Image Express service will be stopped.

New with version 3.0 of Image Express, is the ability to send email notifications to one or more email recipients when the service is stopped due to a fatal error.



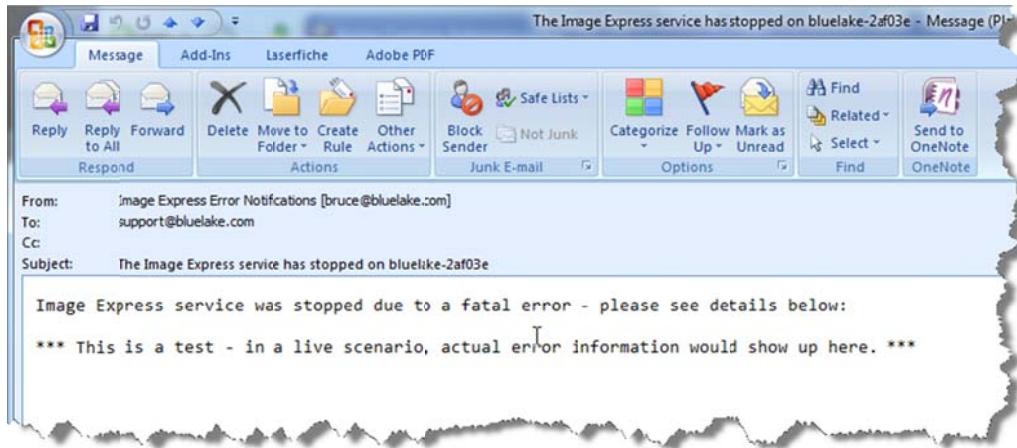
To provide email notification settings, click on the Notify Settings tab. Example entries are provided above. Please refer to your local Outlook or other email client application for the correct settings, or contact your email administrator.

SMTP Address:	Provide a valid SMTP Address.
UserName:	Provide SMTP username – note for many email servers this includes the @<yourdomain.com> attribute. This user will be the “reply” to address on any emails generated by Image Express.
Port:	Provide the local windows Port to use for email notifications. The default value is “25” but could also be “587”, or some other specially configured port value.
Subject Line:	Enter or accept the default value for the text to appear in the Subject line of the email notification. The default value is “The Image Express service has stopped on <MACHINE NAME>”, where <MACHINE NAME> is a reserved word that will be automatically filled in with the machine name of the server or workstation hosting the Image Express service.
Send To:	Provide one or more email addresses. Separate email addresses using a semicolon (;).

After values are complete, you can select Test to test the email settings and send a test email to the

email addresses contained in the Send To list.

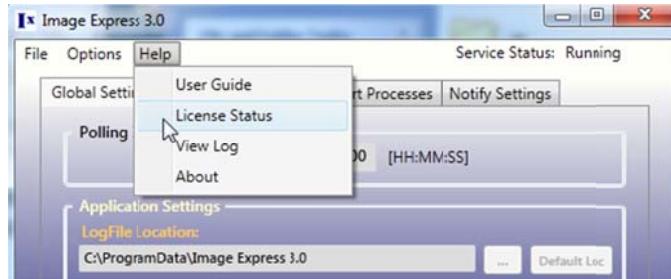
Test Email Sample:



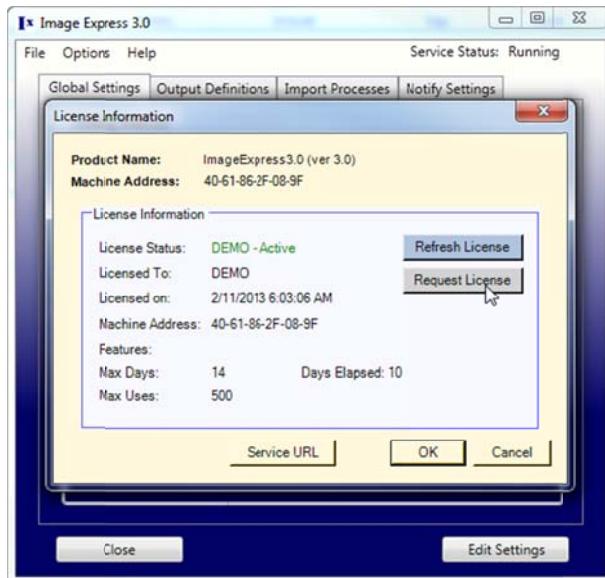
**Click Save Settings to save the current Notification Settings BEFORE moving on to the other tabs**

## Product Licensing:

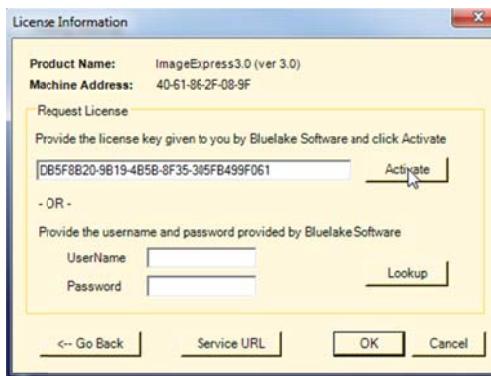
When first installed, Image Express™ is granted a 14 day, 500 document demonstration license. After install, to view the license status, select Help, License Status, as shown below:



The license information will be shown, as depicted below:

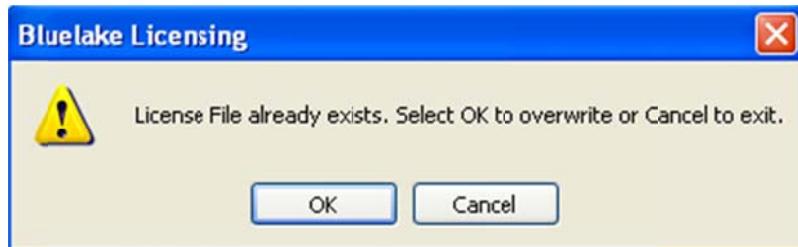


To extend the demo license or to convert to a permanent license, please contact Bluelake for a license code. Upon receipt of the license code, click on "Request License" from the License Information window and the Request License window will appear as shown below:

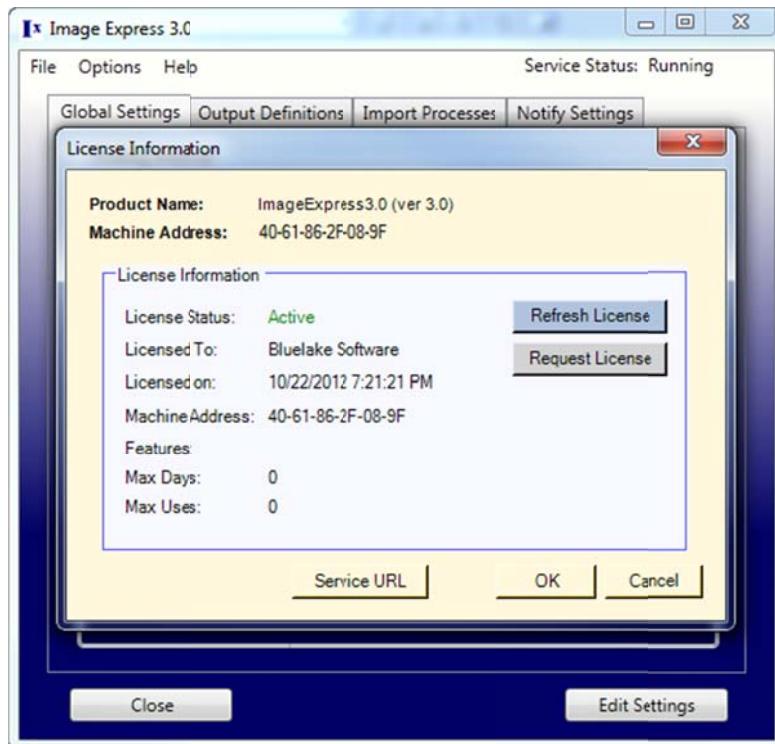


Paste the license code into the Activation box and click "Activate".

Click OK to overwrite the existing (demo) license file with the updated license file:



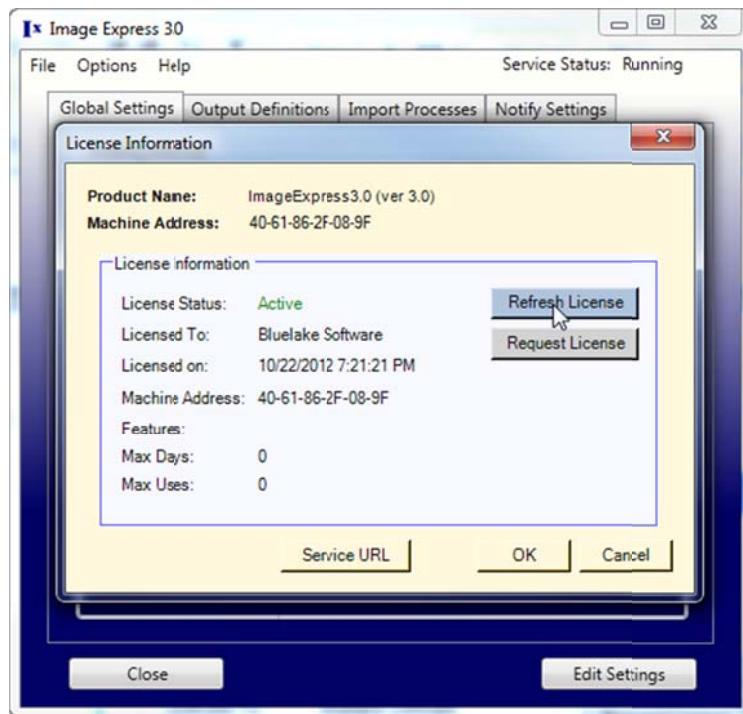
You should then receive the "License File Created Successfully" message and the updated license will display.



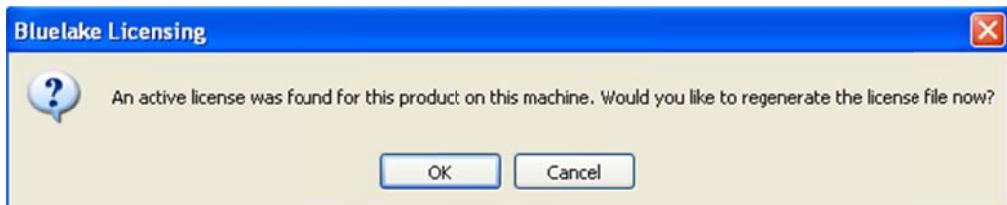
### Refreshing the license

Occasionally, license files can become corrupted, or it may be necessary to rebuild or re-image the machine on which *Image Express™* is installed, requiring a re-installation of Laserfiche Import. As long as the machine MAC address upon which licensing was based has not changed, the original license can be restored from the Bluelake License Server.

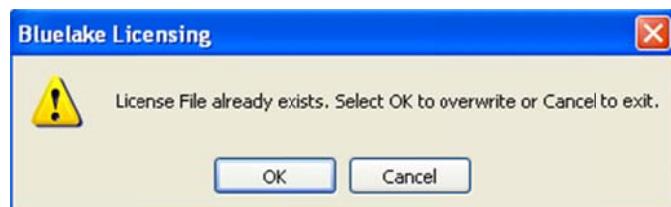
To restore or refresh the product license, click on the Refresh License button, as shown on the next page.



Click OK to regenerate the license file:



Click OK to overwrite any existing license file with the updated license file:

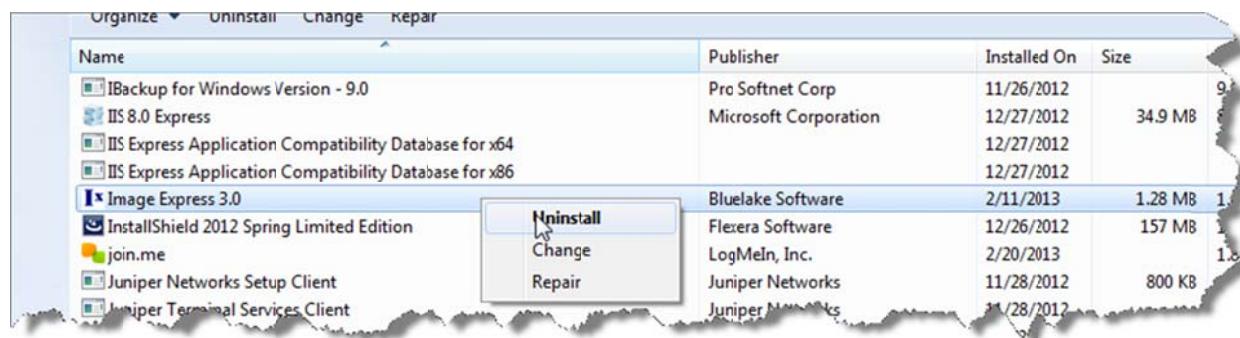


You should then receive the “License File Created Successfully” message and the updated license will display.



## Moving the Product License

It is possible to move an existing product license from one machine to another. To do so, invoke uninstall of Image Express 3.0 from Add/Remove Programs.

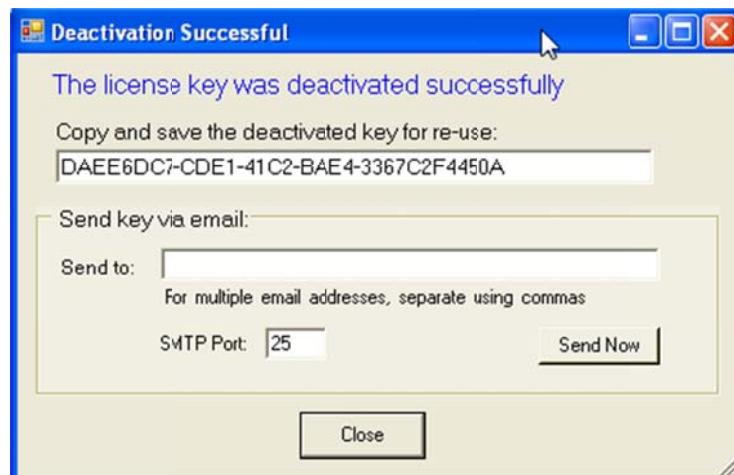


At the end of the uninstall if a valid, permanent license is found on the machine, a prompt will appear regarding uninstalling the license.



If the license will continue to be used on the same machine (i.e. after an uninstall/reinstall sequence), select NO to the prompt above. If the license needs to be moved to a different machine, select YES.

If YES was selected, after a few moments, the deactivation window will display as shown below. Note the deactivation key – this code can be used to Activate the license on another machine:



Optionally, provide one or more email addresses and click "Send Now" to receive the activation code via email.