

OpenText™ Intelligent Capture

**Specialized Export Modules Guide**

This guide contains information about the Intelligent Capture specialized enterprise export client modules.

ECPCORE220300-CEE-EN-1

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**OpenText™ Intelligent Capture  
Specialized Export Modules Guide**  
ECPCORE220300-CEE-EN-1  
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It is also valid for subsequent software releases unless OpenText has made newer documentation available with the product, on an OpenText website, or by any other means.

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## Chapter 1

# Specialized Export Modules

Starting in release 22.3, this new guide contains a compilation of the Intelligent Capture specialized enterprise export client modules. In previous releases, these were available as separate guides.

For information about common features and functionalities in the Intelligent Capture client modules, see *OpenText Intelligent Capture - Module Reference (ECPCORE-CMD)*.

For information about general import and export modules, see *OpenText Intelligent Capture - General Import/Export Modules Guide (ECPCORE-CIO)*.

**Table 1-1: Specialized Enterprise Export Modules**

Module	Original module ID	Link
Archive Export	ecpcore-cxs	See <a href="#">“Archive Export”</a>
Documentum Advanced Export	ecpcore-cxm	See <a href="#">“Documentum Advanced Export”</a>
Documentum ApplicationXtender Export	ecpcore-cxa	See <a href="#">“Documentum ApplicationXtender Export”</a>
FileNet Content Manager Export	ecpcore-cxf	See <a href="#">“FileNet Content Manager Export”</a>
FileNet Panagon IS/CS Export	ecpcore-cxp	See <a href="#">“FileNet Panagon IS/CS Export”</a>
Global 360 Export	ecpcore-cxe	See <a href="#">“Global 360 Export”</a>
Export for SAP Archive and AP Connect	ecpcore-cxc	See <a href="#">“Export for SAP Archive and AP Connect”</a>
IBM Content Manager for Multiplatforms Compatible Advanced Export	ecpcore-cxi	See <a href="#">“IBM Content Manager for Multiplatforms Compatible Advanced Export”</a>
Microsoft SharePoint Export	ecpcore-cxh	See <a href="#">“Microsoft SharePoint Export”</a>
Export for OpenText™ Content Server	ecpcore-cxo	See <a href="#">“Export for OpenText Content Server”</a>



## Chapter 2

# Archive Export

This section includes the Intelligent Capture specialized enterprise export module: **ecpcore-cxs**.

For information about common features and functionalities in the Intelligent Capture client modules, see *OpenText Intelligent Capture - Module Reference (ECPCORE-CMD)*.

## 2.1 Setting Up Archive Export

Most configuration information for Intelligent Capture client modules is defined during *module setup*. You can run a module in setup mode from Intelligent Capture Designer, from Intelligent Capture Administrator, or from a command prompt with appropriate arguments. For details, see *Ways to Run a Module in Setup Mode* in the *OpenText Intelligent Capture - Module Reference (ECPCORE-CMD)* guide.

When launched in setup mode, a client module displays the **Setup** window in which you can specify the module's configuration settings.

### 2.1.1 Importing Transport Request Files into SAP

Before setting up the Archive Export module, import transport request files into the SAP system. A transport request is a document used by the SAP system to copy corrections between different system types. The transport request file contains information about the function group Z\_CPTV, and two function modules, Z\_CAPTIVA\_DOC\_DELETE and Z\_CAPTIVA\_URL\_CREATE, used by Archive Export. Function modules are external subroutines that created using the SAP Function Builder and managed within a central library within the SAP system.

Function groups are a set of logically related function modules. Create the function group Z\_CPTV and the two function modules within that group (Z\_CAPTIVA\_DOC\_DELETE and Z\_CAPTIVA\_URL\_CREATE). Then, import them into SAP to avoid errors in Archive Export. Either [Creating Function Modules Directly](#) or [Using Transport to Create Function Modules](#).

### 2.1.1.1 Creating Function Modules Directly

Create the function group and function modules within a group without using transport request files.

**To create function modules directly:**

1. Open your SAP system and run transaction SE37. The **Function Builder: Initial Screen** window displays.
2. Create a Z\_CPTV function group by navigating to **Goto > Function Group > Create**.
3. Activate the main program and proceed anyway through errors. Activate the LZ\_CPTVTOP INCLUDE file by navigating to **Goto > Function Group > Display Group**. Click the **Main Program** button. Click the **Activate** button in the toolbar.
4. Navigate to the **Utilities > Display object** list box. Double-click LZ\_CPTVTOP to display the source code. Click the **Activate** button.
5. For the SE37 transaction, create the Z\_CAPTIVA\_URL\_CREATE function using the source code in the Z\_CAPTIVA\_URL\_CREATE.txt file. This file is available after you install Archive Export and is located in: <Install Dir>\supporting files\archive export\sap transport files\. Select **Syntax Check** to ensure that the code is accurate.
6. Make the Z\_CAPTIVA\_URL\_CREATE function remote-enabled by selecting the **Remote-enabled module** option on the **Attributes** tab, **Processing type** area.
7. Activate the Z\_CAPTIVA\_URL\_CREATE function by clicking the **Activate** button on the **Source code** tab.
8. For the SE37 transaction, create the Z\_CAPTIVA\_DOC\_DELETE function using the source code in the Z\_CAPTIVA\_DOC\_DELETE.txt file. This file is available after you install Archive Export and is located in: <Install Dir>\supporting files\archive export\sap transport files\. Select **Syntax Check** to ensure that the code is accurate.
9. Repeat steps 6 and 7 for the Z\_CAPTIVA\_DOC\_DELETE function.

### 2.1.1.2 Using Transport to Create Function Modules

Use transport to create function modules.

**To create function modules using transport:**

1. Copy K900014.S60 to /usr/sap/trans/cofiles.
2. Copy R900014.S60 to /usr/sap/trans/data.



**Note:** These files can be found in: <Install Dir>\supporting files\archive export\sap transport files\.

3. At the command line, run the following commands:

```
cd /usr/sap/trans/bin
tp addtobuffer S60K900014 DEV pf=TP_DOMAIN_<SID>.PDF
tp import S60K900014 DEV pf=TP_DOMAIN_<SID>.PDF client=800
```

4. Verify through SE37 that the Z\_CPTV function group exists. If Z\_CPTV does not exist, then repeat the command in step 3.
5. Verify through SE37 that the following function modules exist. If these function modules do not exist, then repeat the command in step 3:

- Z\_CAPTIVA\_URL\_CREATE

**Table 2-1: Z\_CAPTIVA\_URL\_CREATE Import**

Parameter Name	Type	Reference Type	Default Value	Optional	Pass Value	Short Text
CREP_ID	TYPE	TOABC-ARCHIV_ID			X	Content Repository Identification
DOC_ID	TYPE	TOABC-ARC_DOC_ID	SPACE	X	X	SAP ArchiveLink Document ID
COMP_ID	TYPE	TOABC-ARC_DOC_ID	"data"	X	X	SAP ArchiveLink Document ID

**Table 2-2: Z\_CAPTIVA\_URL\_CREATE Export**

Parameter Name	Type	Reference Type	Pass Value	Short Text
URL	TYPE	Character 1024		
DOC_ID_OUT	TYPE	Document ID of the stored file (ArchiveLink or CMS)		
RETURN	TYPE	SAP ArchiveLink: Priority		

- Z\_CAPTIVA\_DOC\_DELETE

**Table 2-3: Z\_CAPTIVA\_DOC\_DELETE Import**

Parameter Name	Type	Reference Type	Default Value	Optional	Pass Value	Short Text
CREP_ID	TYPE	TOABC-ARCHIV_ID			X	Content Repository Identification
DOC_ID	TYPE	TOABC-ARC_DOC_ID			X	SAP ArchiveLink Document ID

**Table 2-4: Z\_CAPTIVA\_DOC\_DELETE Export**

Parameter Name	Type	Reference Type	Pass Value	Short Text
RETURN	TYPE	<i>SAPB-RETURN</i>	X	SAP ArchiveLink: Priority

SAP returns a URL when the ArchiveExport module wants to add a document in the following format : `http://<server name:portnumber> /sap/bc/contentserver/800?create&pVersion=0046&contRep=MA&docId=<DOCID>&compId=data&docProt=rud`

- **contRep** is the content repository Id.
- **docId** is the Document id of the document (guid).

To view or download an archived document use the URL in the following format:  
`http://<server name:portnumber> /sap/bc/contentserver/800?docGet&pVersion=0046&contRep=MA&docid=<DOCID>&compid=data&docProt=rud`

## 2.1.2 Configuring SAP R/3 Connections

Each task the module receives specifies connection information for the SAP R/3 system, to which data from the task is exported. Each task can contain a user ID and password to enable fully automated connection and unattended export to the SAP R/3 system specified in the task. The operator can log in to one or more SAP R/3 systems when starting the module in production mode. This connection is also established by subsequent use of the **Session** command in the **File** menu of the production window.

There are two types of connections that can be made to an SAP R/3 system:

- **Task-based connections:** A connection is made when the module you are running receives a task from the Intelligent Capture Server. Task-based connections are specified during module setup and are not necessarily persistent. The task can direct the module to disconnect when the connection is no longer needed. Connecting and disconnecting from servers takes time, but can be useful when security is a concern or when operating with a limited number of repository system licenses.
- **Module-based connections:** A connection is made when the module starts up or when the operator chooses the **Sessions** command from the **File** menu and specifies one or more SAP R/3 systems in the **Logon to SAP Server** window. Module-based connections are persistent. The module remains connected to each server that was specified in this way until the module exits or until the operator specifically chooses to disconnect from a server. Connecting one time and remaining connected results in faster task processing, but can result in security compromises and require more repository system licenses. Module-based connections override the task settings for disconnecting from SAP R/3 systems that are no longer needed.

Unless the operator specifies *-autostart* on the command line, the **Login to SAP Server** window displays immediately after the module starts in production mode. The list of sessions in the lower portion of the window shows the connections that are already established and active.

### 2.1.3 Configuring SAP R/3 System for Late Archiving

Use late archiving mode when administrative data has already been stored in the SAP R/3 system. During late archiving, content (captured images and other binary data) is exported in a separate export task to the Content Server using the SAP HTTP Content Server Interface. A barcode that associates the content with its related administrative data uniquely identifies late-archived content. Configure document types, document classes, barcodes, and link tables to ensure that the late archiving process is successful. Documents that are late-archived are not available until after the entire archive operation has been completed. The Content Server also uses this barcode data to locate the SAP document via its *DocID*.

Late Archiving can be performed using one of the following methods:

- **Late Archiving mode - Store with bar code**
- **Late Archiving mode - Assign object with bar code**

The following configuration is necessary for late archiving mode:

- An SAP R/3 system that has been configured with the SAP ArchiveLink
- A content server that has been configured with the SAP HTTP Content Server Interface
- An Intelligent Capture custom exporter for Archive Export
- Intelligent Capture A/P Connect
- The required networking infrastructure to interconnect these components

For information on supported versions of these components, see the *Intelligent Capture Release Notes* (available in My Support (<https://support.opentext.com/>)).

#### **To configure an SAP R/3 system for late archiving:**

1. Run Archive Export for setup. The **Archive Export Setup** window displays.
2. If necessary, select the **Logon** tab and connect to the SAP R/3 system.
3. When connected to the SAP R/3 system, display the **SAP Easy Access** window.
4. In the **execution** field, type **SPR0**. The **Customizing: Execute Project** window displays.
5. Click the **SAP Reference IMG** button. The **Display Structure** window displays.
6. Expand nodes in the following order:

- **Basis Components > Basic Services > SAP ArchiveLink > Basic Settings > Administration Settings > System Settings.**



**Note:** The following steps must be performed in order:

7. To configure the barcode format and type needed for storage, navigate to **System Settings > Maintain bar code types**. Select the **Activity** icon, which resembles a clock with a green check mark. Unless you have specific requirements, the default settings are recommended.
8. To create document classes for your application, navigate to **System Settings > Maintain document classes**. Select the **Activity** icon. Select the defaults with a document class of **FAX**.



**Note:** If you do not need to create document classes, you can skip this step.

9. To create document types for your application, navigate to **System Settings > Maintain document types**. Click the **Activity** icon. Select the document type **ZCSFAX**.



**Note:** If you do not need to create document types, you can skip this step.

10. To configure the document type and barcode for use with the business object, navigate to **Administration Settings > Activate bar code storing**. Select the **Activity** icon. Select the **Object type BUS2081**.
11. To set the document type, content repository, and link table used for the business object **BUS2081**, navigate to **Basic Settings > Maintain Links**. Select the **Activity** icon. Select the link table **TOA02**.



**Note:** Only configure link tables for the Late Basic Document with barcode process.

## 2.1.4 Registering the SLDRegistration Executable


The Archive Export client module connects to and populates an SAP system with administrative data and content. The SAP System Landscape Directory (*SLD*) contains information about installed SAP components in a central repository. This information facilitates the maintenance of complex SAP system landscapes.

- Connect to the SLD and provide details of the SAP system used with Archive Export.
- Run the `SLDRegistration.exe` executable from the `InputAccelerator\client\binnt` directory and register information about the Host, Port, and user credentials of the SAP system.

## 2.1.5 Logging in to an SAP R/3 System for Archive Export Setup

Setting up Archive Export requires logging in to an SAP R/3 system.

### To log on to an SAP R/3 system:

1. Start Archive Export in setup mode. The **Archive Export Setup window** displays.
2. Select the **Logon tab**.
3. Note the **Connection Status** information at the bottom of the tab.
  - If it shows **Connected To** *<server\_name> As <user\_ID>*, then the module is already logged in with the credentials indicated. If this connection is valid for setting up the current module instance, then perform the setup tasks described in the other topics of this section. Select **OK** to save your settings and close the module.
  - If it shows **Connected To** *<server\_name> As <user\_ID>*, but the connection is not valid for setting up the current module instance, select **Disconnect** and proceed to step 4.
  - If it shows **Not Connected**, then the module is not currently connected to an SAP R/3 system. Proceed to step 4.
4. Specify the necessary connection and login information as follows:
  -  **Note:** If you are using an SAP Router string, prepend the server name with the SAP Router string.
  - In the **System Name** field, type the name of the SAP R/3 system to which you want to connect.
  - In the **Client** field, type a client number.
  - In the **User** field, type your SAP R/3 system user name.
  - In the **Password** field, type the password that corresponds to the specified **User name**.
  - In the **System Number** field, type the system number to which you want to connect.
  - Select **Connect**. If the connection is successful, the **Connection Status** field shows the connection information.
5. Perform other setup tasks, then click **OK** to save your settings and close the module.

## 2.1.6 Defining Export Options

Settings on the **Export tab** of the **Archive Export Setup** window specify how the module will process tasks and what the module will export to the repository system. The **Export** tab enables managing multiple document definitions. Options include creating and editing document definitions, specifying when a new document is created, and specifying which document definition to use when exporting.

### 2.1.6.1 Creating, Editing, or Deleting Document Definitions

**To create, edit, or delete a document definition:**

1. Run Archive Export for setup and the **Archive Export Setup** window displays.
2. Select the **Export tab**. In the **Document Definition Set** section:
  - Click the **New** button to create a definition, and the **Definition Properties window** displays.
  - Select an existing definition and click the **Edit** button to edit the selected definition, and the **Definition Properties** window displays.
  - Select an existing definition and click the **Delete** button to remove the selected definition from the list box. If you are only deleting definitions, you can click **OK** and exit the setup window.
3. Configure each of the tabs in the window as explained in the following topics:
  - **General tab**
  - **Indexes tab** or **Indexes tab**
  - **Image tab**
4. Perform other setup tasks, then click **OK** to close the **Definition Properties** window.

#### **Related Topics**

[“Selecting the Document Definition for Export” on page 23](#)

[“Creating, Editing, or Deleting Document Definitions” on page 22](#)

[“Specifying the Image Properties of Document Definitions” on page 24](#)

### 2.1.6.2 Selecting the Document Definition for Export

Specify the document definition you want to use when exporting the document. A document definition is specification of how to process a group of pages. Exporting items based on document definitions increases flexibility. For example, it enables exporting multiple file types, or exporting stage files to multiple locations without creating multiple instances of the module.

#### To specify the definition to use during document export:

1. Run Archive Export for setup and the **Archive Export Setup** window displays.
2. Select the **Export tab**.
3. Click the down arrow in the **Definition to Export** field and select the document definition you want to use based on the **Document Definitions Set** at the top of the **Export tab**. You can alternatively specify an IA Value that resolves to a document definition when the module runs in production mode. To specify this value, select the browse button to the right of the field to display the **Choose Value** window and select the IA Value.
4. Click **OK** and the settings are preserved.

#### Related Topics

["Definition Properties" on page 37](#)

["Creating, Editing, or Deleting Document Definitions" on page 22](#)

### 2.1.6.3 Creating, Editing, and Deleting SAP Index Fields

SAP index fields are part of the document definition and are the administrative data that your content is mapped to. SAP index fields are settings that define what SAP index fields will be populated. Generally, only populate SAP index fields when using early archiving mode. When using late archiving mode, the SAP R/3 system will already contain all indexing data associated with the document being exported. In that case, the barcode value specified in the **Workitem** section of the **General tab** links the exported image data to the existing administrative data.)

#### To create, edit or delete an SAP index field:

1. Run Archive Export for setup and the **Archive Export Setup** window displays.
2. Select the **Export tab**. In the **Document Definition Set** section:
  - Click the **New** button to create a definition, and the **Definition Properties** window displays.
  - Select an existing definition and click the **Edit** button to edit the selected definition, and the **Definition Properties** window displays.
3. Click the **Indexes** tab:

- Click the **New** button to create an SAP index, and the **New SAP Index window** displays.
  - Select an existing index and click the **Edit** button to edit the selected index, and the **Edit SAP Index** window displays.
  - Select an existing index and click the **Delete** button to remove the selected index from the list box. If you are only deleting definitions, you can click **OK** and exit the window.
4. In the **Index Name** field, type the name of the SAP index field you want to map. You can specify a specific name or an IA Value that resolves to an SAP index field name when the module runs in production mode. To use an IA Value that is defined in one of the module instances of the batch, select the **Browse** button to the right of the field to display the **Choose Value** window. Select the IA Value.
  5. In the **Index Value** field, specify a value to export to the SAP index field. Specify a specific value or an IA Value that resolves to the SAP index value you want to export when the module runs in production mode. To use an IA Value that is defined in one of the module instances of the batch, select the **Browse** button to the right of the field to display the **Choose Value** window. Select the IA Value.
  6. Click **OK** to close the **New SAP Index** window.

### Related Topics

[“Creating, Editing, or Deleting Document Definitions” on page 22](#)

[“Selecting the Document Definition for Export” on page 23](#)

[“Specifying the Image Properties of Document Definitions” on page 24](#)

#### 2.1.6.4 Specifying the Image Properties of Document Definitions

Image properties are the settings that define the source and type of document to store. For image files, you can specify the file type, format, and compression parameters.

##### To specify the image parameters for a document definition:

1. Run Archive Export for setup and the **Archive Export Setup** window displays.
2. Select the **Export** tab. In the **Document Definition Set** section:
  - Click the **New** button to create a definition, and the **Definition Properties window** displays.
  - Select an existing definition and click the **Edit** button to edit the selected definition, and the **Definition Properties** window displays.
3. Select the **Image** tab.

4. Specify the file type, color format, and compression parameters to use for the image files.
5. Click **OK** and these settings become part of the selected document definition.


### Related Topics

[“Creating, Editing, or Deleting Document Definitions” on page 22](#)

[“Selecting the Document Definition for Export” on page 23](#)

## 2.1.7 Understanding Archiving Modes

Archive Export operates in two general modes.

- Early Archiving exports content and administrative data (see [“Creating, Editing, or Deleting Document Definitions” on page 22](#)) in the same export operation (i.e., as a single task) via the SAP ArchiveLink interface. The Archive Export module exports content (image) data, then checks to see if the export to the Content Server was successful, then exports the administrative data. Archive Export then checks to see if the administrative export was successful. If not, the module rolls back the content export, removing the task image data from the Content Server. Please consult <http://help.sap.com> for information on preparing SAP for early archiving.
- Late Archiving is employed when administrative data has already been stored in the SAP R/3 system. Content (captured images and other binary data) is exported to the Content Server via its SAP HTTP Content Server Interface. A unique barcode associates the content with the administrative data. Late-archived documents are not available until after the entire archive operation has been completed. The Content Server also uses this barcode data to locate the SAP document via its DocID. Late Archiving is accomplished in one of two modes:
  - **Late Archiving mode - Store with bar code:** Use this option for simple storage of documents on the content server with linkage to a barcode, regardless of whether an invoice or other type of SAP document has been created in SAP. The image stored on the content server is viewable using SAP transaction OAM1.
    -  **Note:** If you select this option, the **Bar Code** field is required. If you do not supply a barcode, the export will fail.
  - **Late Archiving mode - Assign object with bar code:** Use this option if the document being stored on the content server will be linked to an SAP document with a barcode. This archive mode assumes that the document is stored under a particular business object and document type. Therefore, before you can use this option, you must have set up your link tables. If you are using Archive Export with Intelligent Capture for Invoices, then use: BUS2081 for the **Business Object**, IA Value: `<@(CustomValues.INVOICE_OBJECTID)>` for the **Object ID**, and IA Value: `<@(CustomValues.INVOICE_GUID)>` for the **Bar code** fields. The image stored on the content server is viewable using SAP transaction OAM1.

### 2.1.7.1 Specifying an Archiving Mode

Archiving modes are part of the **Creating, Editing, or Deleting Document Definitions**. Archiving is defined and are selected based on whether administrative data is, or is not, on the SAP server. Use the following information and guidance when selecting an archiving mode:

- With Early Archiving, you must also specify an **SAP Index** as part of your document definition since the index and content are exported in a single operation.
- With Late Archiving, the SAP R/3 system will already contain all indexing data associated with the document being exported. In that case, the barcode value specified in the **Workitem** section of the **General** tab links the exported image data to the existing administrative data.

**To specify an archiving mode:**

1. Run Archive Export for setup and the **Archive Export Setup** window displays.
2. Select the **Export tab**. In the **Document Definition Set** section:
  - Click the **New** button to create a definition, and the **Definition Properties** window displays.
  - Select an existing definition and click the **Edit** button to edit the selected definition, and the **Definition Properties** window displays.
3. Select the **General** tab and specify the Archive mode from the **Workitem** section.
4. Specify any other definition settings and click **OK**. The mode is saved.

## 2.2 Running Archive Export in Production

After the module has been set up, tested, and placed in a production environment, operators and administrators will run the module in production.

For information related to common production tasks for unattended modules, see *Running a Module for Production* in the *OpenText Intelligent Capture - Module Reference (ECPCORE-CMD)* guide.



**Note:** The *Running Modules in Production Mode* section contains production topics that are common to many unattended modules and may not apply to this module.

## 2.3 Reference—Archive Export

The topics within this section contain reference information useful while using the application in setup or production.

### 2.3.1 Windows

The topics within this section provide descriptions of windows accessible from the application. The topics list the user interface element name and include a brief description of actions available from the window.

#### 2.3.1.1 Archive Export

The **Archive Export** window is the control center for running and monitoring export tasks.

**Table 2-5: Archive Export Window**

Element	Description
<b>File menu</b>	Enables you to open and process batches, and open sessions for those batches.
<b>Run menu</b>	Enables you to run all available batches or a single selected batch.
<b>Help</b>	Provides access to the help system where you can find information to guide you while working in the module.
<b>Toolbar</b>	The Archive Export toolbar displays buttons to open sessions, launch, and close export processes.
<b>Task Progress</b>	An expanding bar that represents the current task progress.
<b>Processing from batch</b>	The name of the batch that is being processed.
<b>Instance</b>	The name of the batch step.
<b>Task Node</b>	The current node being processed.
<b>Tasks remaining on server</b>	The number of tasks remaining to be processed.

Element	Description
<p><b>Error Message pane</b></p>	<p>The <b>Error Message</b> pane opens in the <b>Archive Export</b> window when an error is encountered during production. This pane gives a short explanation of the error. This error message also appears in the <b>Activity Messages</b> pane, where more information about the error is given.</p> <p>When you click the reported error in the <b>Error Message</b> pane, the error is highlighted in the <b>Activity Messages</b> pane where you can obtain information about the error message including the error code, and information about the batch, instance, and task in which the error occurred.</p> <p>If you double-click the reported error, it is removed from the <b>Error Message</b> pane, and a black circle with an X displays at the location of the error in the <b>Activity Messages</b> pane, indicating that you have reviewed the error.</p>
<p><b>Activity Messages pane</b></p>	<p>The <b>Activity Messages</b> pane is found in the <b>Archive Export</b> window, and reports all user and production activity and error messages during batch processing.</p> <p>When an error occurs, it is highlighted with a red circle and exclamation point and states the error message, error code, and other relevant information about the batch, instance, and task. The error message is also reproduced in the <b>Error Message</b> pane directly above the <b>Activity Messages</b> pane.</p>

**2.3.1.1.1 File Menu**

The **File** menu of the **Archive Export** window presents the following options.

**Table 2-6: Archive Export Window, File Menu**

Element	Description
<p><b>Sessions</b></p>	<p>Opens the <b>Logon to SAP Server</b> window so you can open server sessions for batch processing of tasks without embedded session logon information.</p>
<p><b>Open Batch</b></p>	<p>Opens a batch for processing in Open Batch mode.</p>
<p><b>Close Batch</b></p>	<p>Closes an open batch.</p>

Element	Description
Set Up Instance	Displays the <b>Archive Export Setup window</b> , enabling you to specify custom settings for the open batch.
Export	Processes the open batch.
Exit	Exits the Archive Export module.

### 2.3.1.1.2 Run Menu

The **Run** menu of the **Archive Export** window presents the following options:



**Table 2-7: Archive Export Window, Run Menu**







Element	Description
All Batches	<b>All Batches</b> mode is a “Wait for Task” mode (a mode in which you can only process batches that are queued on the Intelligent Capture Server for the module). In <b>All Batches</b> mode, the module receives any queued tasks from any open batch as the tasks become available from the Intelligent Capture Server.
Single Batch	<b>Single Batch</b> mode is a “Wait for Task” mode. In <b>Single Batch</b> mode, you choose a single queued batch to process.
Stop	Cancel processing of the current task and stop accepting tasks from the Intelligent Capture Server.

### 2.3.1.1.3 Archive Export Toolbar

The **Archive Export** toolbar on the **Archive Export** window provides you with buttons to launch or close export processes.

**Table 2-8: Archive Export Toolbar**

Button	Button Name	Description
	Sessions	Opens the <b>Logon to SAP Server</b> window so you can open server sessions for batch processing of tasks without embedded session logon information.
	Open Batch	Opens a batch for processing in <b>Open Batch</b> mode.

Button	Button Name	Description
	Close Batch	Closes an open batch.
	Set Up Instance	Displays the <b>Archive Export Setup</b> window, allowing you to specify custom settings for the open batch.
	Export	Processes the open batch.
	Run All Batches	<b>Run All Batches</b> mode is a “Wait for Task” mode (a mode in which you can only process batches that are queued on the Intelligent Capture Server for the module). In <b>Run All Batches</b> mode, the module receives any queued tasks from any open batch as the tasks become available from the Intelligent Capture Server.
	Run Single Batch	<b>Run Single Batch</b> mode is a “Wait for Task” mode. In <b>Run Single Batch</b> mode, you choose a single queued batch to process.
	Stop	Cancel processing of the current task and stop accepting tasks from the Intelligent Capture Server.

### 2.3.1.2 Archive Export Setup

The **Archive Export Setup** window displays by running Archive Export for setup, and contains the following tabs:

**Table 2-9: Archive Export Setup Window**

Element	Description
Logon tab	Specifies the destination server for the Archive Export module and allows the user to set up automatic logon.

Element	Description
<b>Export tab</b>	Enables you to specify the following: <ul style="list-style-type: none"> <li>• A set of document definitions</li> <li>• Definition to use for the file that you are exporting</li> <li>• Criteria for splitting documents</li> </ul>
<b>Errors tab</b>	Enables you to specify how to handle errors as they occur during production.
<b>Logging tab</b>	Enables you to control the output of error information if it is generated during task processing.
<b>Info tab</b>	Displays module and server information. This is information only and cannot be edited from this tab.

#### 2.3.1.2.1 Logon tab

The **Logon** tab on the **Archive Export Setup** window specifies the destination server for the Archive Export module and allows the user to set up automatic logon. Automatic logon is an optional feature that enables the Archive Export module to process tasks for multiple repository servers in an unattended mode. This is accomplished by using the credentials specified during module instance setup. The available options are:

**Table 2-10: Archive Export Setup Window, Logon tab**

Element	Description
<b>System Name</b>	Type the name of the SAP R/3 system to which you want to connect; for example: <code>sapserver1</code> . Contact your administrator for a list of SAP R/3 system names.
<b>Client</b>	Type a client ID; for example: <code>900</code> . Contact your administrator for a valid client ID.
<b>User</b>	Type your SAP R/3 system user name.
<b>Password</b>	Type the password that corresponds to the specified <b>User</b> name.
<b>System Number</b>	Type your SAP R/3 system number.

Element	Description
<p><b>Automatic Logon</b></p>	<p>Use the above user and password for tasks sent to this instance for automatic logon. This enables the <b>Disconnect When</b> list box.</p> <p><b>Disconnect When</b> specifies when the server can be disconnected. The available options are:</p> <ul style="list-style-type: none"> <li>• <b>The task is finished:</b> The module disconnects from the repository or server when the task finishes. Select this option if you have a limited number of licenses and need to connect from multiple clients.</li> <li>• <b>A different login is received:</b> The module remains connected to the specified repository or server until it receives a task that specifies different credentials. It then disconnects from any other task-based connections before connecting using the credentials of the new task. Select this option when most tasks will be exported to a single repository or server, as fewer logout/login cycles will improve performance.</li> <li>• <b>The module exits:</b> After it is connected, the Archive Export module remains connected to this server until the module exits. Select this option when you have sufficient licenses for all clients that will be simultaneously accessing the server, as no logout and fewer login cycles will improve performance.</li> </ul>
<p><b>Connection Status</b></p>	<p>Indicates the current state of the connection.</p>

**2.3.1.2.2 Export tab**

The **Export** tab on the **Archive Export Setup** window enables you to specify the following:

- A set of document definitions
- Definition to use for the file that you are exporting
- Criteria for splitting documents

**Table 2-11: Archive Export Setup Window, Export tab**

Element	Description
<b>Document Definition Set</b>	<p>Lists the currently defined document definitions for the project. From here you can create definitions, edit, or delete existing definitions.</p> <ul style="list-style-type: none"> <li>• <b>New:</b> Creates a new definition and opens the <b>Definition Properties</b> window where you can configure that definition.</li> <li>• <b>Edit:</b> Opens the <b>Definition Properties</b> window where you can configure the setup for the selected definition. This button is unavailable if no definitions are selected.</li> <li>• <b>Delete:</b> Deletes the currently selected definition. This button is unavailable if no definitions are selected.</li> </ul>
<b>Split when value changes</b>	<p>Enter an IA Value to indicate that a subsequent page will be considered to be a new document. If you are using an IA Value that during production will resolve to a valid IA Value, click <b>Browse</b> to display the <b>Choose Value</b> window, and then choose the appropriate IA Value. The default value is &lt;@17&gt;, which is the document (level 1) within the batch (level 7). This causes a new document to be exported for every level 1 node in the IA tree.</p>
<b>Definition to Export</b>	<p>Determines the document definition that the module uses. Type a value or click the <b>Browse</b> button to select an IA Value.</p>

**Related Topic**

*“Defining Export Options” on page 22*

**2.3.1.2.3 Errors tab**

The **Errors** tab is found on the **Archive Export Setup** window. The **Errors** tab settings are:

**Table 2-12: Archive Export Setup Window, Errors tab**

Element	Description
When an Error Occurs	<p>Select the <b>Prompt for an action</b> or <b>Automatically respond with the following actions</b> depending on whether or not production will occur on an attended or unattended machine.</p> <ul style="list-style-type: none"> <li>• <b>Prompt for an action:</b> This option is for attended machines only. Selecting this option suspends processing until the operator responds to the <b>Production Error</b> window.</li> <li>• <b>Automatically respond with the following actions:</b> This option is for unattended machines or when operator intervention is not necessary. You can specify the following settings when this option is selected. <ul style="list-style-type: none"> <li>– <b>Abort entire task:</b> Aborts the current task and returns an appropriate <i>&lt;ExportResult&gt;</i> IA Value, which is evaluated by instructions in the <i>IPP Finish</i> event handler. The module may or may not continue processing other tasks depending on how you set the remaining options in this section. If you do not plan to provide error handling in your IPP, you should select the default settings of <b>Abort entire task</b> and <b>Set the batch priority to 0</b> when automatically responding to errors to avoid an ongoing, error retry situation.</li> <li>– <b>Skip node that produced the error and continue with remaining nodes:</b> Skips the node where error occurred and attempts to continue with the remaining nodes in the task, if any. The module returns an appropriate <i>&lt;ExportResult&gt;</i> IA Value for the node that produced the error occurred, which is evaluated by instructions in the <i>Finish</i> event handler of the IPP.</li> <li>– <b>Stop receiving tasks after current task:</b> Stops receiving tasks from the Intelligent Capture Server when an error occurs in the current task. This is equivalent to the operator choosing the <b>Stop</b> command.</li> <li>– <b>Set the batch priority to 0:</b> Sets the batch priority of the current task to 0</li> </ul> </li> </ul>

Element	Description
	<p>when an error occurs. This takes the batch off line, preventing further processing by any module until the administrator resets the batch priority. When this check box is cleared, the batch priority is not changed and batch processing continues as before the error occurred, except as specified in the <b>IPP Error</b> event handler (when you select <b>Abort entire task</b>) or in the <b>Finish</b> event handler (when you select <b>Skip node</b> that produced the error and continue with remaining nodes) in response to the <code>&lt;ExportResult&gt; IA Value</code>.</p>
<b>Recovery Options</b>	<ul style="list-style-type: none"> <li>• <b>Automatically retry &lt;n&gt; time(s) before reporting error:</b> Select the check box if you want the module to automatically retry processing the task that caused an error. Specify the number of times it should retry in the field to the right. Some error conditions can cease to exist upon subsequent attempts at processing a task. For example, a temporary file or record lock in the repository server might cause an error, but might be resolved by the time the module attempts to process the task again. Clear the check box if you do not want the module to retry tasks that produce errors.</li> <li>• <b>Skip nodes that have already been successfully processed by this instance:</b> Prevents the module from reprocessing nodes that have already been successfully processed. When this field is cleared, the module will reprocess all nodes in the task, even those that have already been successfully processed.</li> </ul>



**Note:** When the module encounters an error in a task during production, and no error routine has been provided in the IPP, the task finishes with an error and is requeued. The task is then resubmitted to the module for processing and is likely to again cause an error. This cycle repeats indefinitely. If no error handling is included in the IPP, select the default settings of **Abort Entire Task** and **Set The Batch Priority To 0** when automatically responding to errors to avoid this error retry scenario. When running the module unattended, select **Automatically Respond With The Following Options** to specify how errors should be handled.

#### 2.3.1.2.4 Logging tab

The **Logging** tab of the **Archive Export Setup** window allows you to control the output of error information resulting from task processing. The **Logging** tab options are:

**Table 2-13: Archive Export Setup Window, Logging tab**

Element	Description
Log messages to a file	<p>Logs messages to a specified file. When selected activates <b>Severity to log</b> and <b>File name</b>.</p> <ul style="list-style-type: none"> <li>• <b>Severity to log:</b> <ul style="list-style-type: none"> <li>– <b>Errors Only</b></li> <li>– <b>Errors and Information</b></li> </ul> </li> <li>• <b>File name:</b> Contains the name and location of the log file name. You can use the <b>Browse</b> button to point to the file location from the <b>Select</b> window. When you log messages to a shared location and are running multiple copies of the module, you must specify a unique log file name for each module instance by specifying the appropriate IA Values in the file name.</li> </ul>
Send error messages to the InputAccel Server's Event Log	Logs error messages to the Intelligent Capture Server.

#### 2.3.1.2.5 Info tab

The **Info** tab of the **Archive Export Setup** window displays module and server information. This display is provided for information only and cannot be edited from this tab. Modification of any of these properties must be completed during module setup.

**Table 2-14: Archive Export Setup Window, File Menu**

Element	Description
Instance Properties	<ul style="list-style-type: none"> <li>• <b>Name:</b> The name of the module instance as declared in the <i>IPP</i>.</li> <li>• <b>Departments:</b> The names of departments defined in the batch or process.</li> <li>• <b>Process/Batch name:</b> The name of the batch or process that contains the module instance.</li> <li>• <b>Process/Batch ID:</b> The unique ID number of the batch or process that contains the module instance.</li> </ul>

Element	Description
<b>InputAccel Server Connection</b>	<ul style="list-style-type: none"> <li>• <b>Server name:</b> The Intelligent Capture Server name that is connected to the client machine. This is the server that owns the batch or process you are setting up.</li> <li>• <b>Username:</b> The domain and user ID specified when the connection to the Intelligent Capture Server was established during module setup.</li> </ul>

### 2.3.1.3 Definition Properties

Document definition properties are set from the **Definition Properties** window. Each document definition includes all of the settings specific to IBM CommonStore for SAP that must be defined to export a document successfully. The definition includes server information and the type and location of SAP documents to create. The definition can also specify index information and the image format for export.

The **Definition Properties** window displays when you click the **New** or **Edit** buttons on the **Export** tab of the **Archive Export Setup** window.

The tabs in the **Definition Properties** window are:

**Table 2-15: Definition Properties Window**

Element	Description
General tab	The <b>General</b> tab contains settings related to the SAP R/3 system and the type and location of SAP document that the exporter will create.
Indexes tab Indexes tab	The <b>Indexes</b> tab contains settings that define what SAP index fields should be populated. Generally, you should only populate SAP index fields when using Early Archiving mode.
Image tab	The <b>Image</b> tab in the <b>Definition Properties</b> window contains settings that define the source and type of document to store. For image files, you can specify the file type, format and compression parameters.

### Related Topics

[“Defining Export Options” on page 22](#)

[“Creating, Editing, or Deleting Document Definitions” on page 22](#)


[“Specifying the Image Properties of Document Definitions” on page 24](#)

### 2.3.1.3.1 General tab

The **General** tab in the **Definition Properties** window contains settings related to the SAP R/3 System and the type and location of SAP documents that the exporter will create.

**Table 2-16: Definition Properties Window, General tab**

Element	Description
Definition Name	The name for your document definition.

Element	Description
Workitem	<p>These settings control how administrative data that has been captured by the Intelligent Capture system is exported to the SAP R/3 system.</p> <ul style="list-style-type: none"> <li>• <b>Archive Mode:</b> For selecting one of the following SAP document archiving scenarios: <ul style="list-style-type: none"> <li>– <b>Early:</b> This option exports content (captured document images and other binary data) together with their corresponding administrative data (index entries, statistical values, etc.) at the same time.</li> <li>– <b>Late - Store with bar code:</b> Use this option for simple storage of documents on the content server with linkage to a barcode, regardless of whether an invoice or other type of SAP document has been created in SAP. The image stored on the content server is viewable using SAP transaction OAM1.</li> </ul> </li> </ul> <p> <b>Note:</b> If you select this option, the <b>Bar Code</b> field is required. If you do not supply a barcode, the export will fail.</p> <ul style="list-style-type: none"> <li>– <b>Late - Assign object with bar code:</b> Use this option if the document being stored on the content server should be linked to an SAP document with a barcode. This archive mode assumes the document is stored under a particular business object and document type. Therefore, before you can use this option, you must have set up your link tables. If you are using Archive Export with Intelligent Capture for Invoices, then use: <b>BUS2081</b> for the <b>Business Object</b>, IA Value: <code>&lt;@(CustomValues.INVOICE_OBJECTID)&gt;</code> for the <b>Object ID</b>, and IA Value: <code>&lt;@(CustomValues.INVOICE_GUID)&gt;</code> for the <b>Bar code</b> fields. The image stored on the content server is viewable using SAP transaction OAM1.</li> </ul> <ul style="list-style-type: none"> <li>• <b>Archive ID:</b> The ID of the SAP ArchiveLink repository you want to use. If you are using an IA Value that, during</li> </ul>

Element	Description
	<p>production, resolves to a valid IA Value, select <b>Browse</b> to display the <b>Choose Value</b> window, and then choose the appropriate IA Value.</p> <ul style="list-style-type: none"> <li> <b>Document Class:</b> Type the SAP document class to which the document belongs. Specify a specific value or an IA Value that resolves to a Document Class when the module runs in production mode. To use an IA Value that is defined in one of the module instances of the batch, select the <b>Browse</b> button to the right of the field to display the <b>Choose Value</b> window and select the IA Value.         </li> <li> <b>Bar code:</b> Type the barcode value to be sent to SAP during late archiving. In most cases, this value must be unique for each document you export; therefore, you should specify an <b>IA Value</b> that resolves to a barcode value when the module runs in production mode. To use an IA Value that is defined in one of the module instances of the batch, select the <b>Browse</b> button to the right of the field to display the <b>Choose Value</b> window and select the IA Value. If you are using Intelligent Capture for Invoices, then you should specify IA Value:  <code>&lt;@(CustomValues.INVOICE_GUID)&gt;</code>. If you leave this field blank, then Archive Export generates a globally unique identifier if you have selected either <b>Early archive mode</b> or <b>Late - Assign object with bar code archive mode</b>. If you have selected <b>Late - Store with bar code archive mode</b> and leave this field blank, then the export will fail.         </li> <li> <b>Document Type:</b> For <b>Early Archiving Mode</b>, you must enter the type of archive object to use when early archiving. This option is unavailable if you specified <b>Late</b> for the Archive Mode. If you are using an IA Value that during production will resolve to a valid IA Value, select <b>Browse</b> to display the <b>Choose Value</b> window, and then choose the appropriate IA Value.         </li> <li> <b>Object ID:</b> Only available with <b>Late - Assign object with bar code</b> mode. If you are using Archive Export with Intelligent Capture for Invoices, then use IAValue         </li> </ul>

Element	Description
	<p data-bbox="997 331 1430 390">&lt;@(CustomValues.INVOICE_OBJECTID)&gt; for the <b>Object ID</b>.</p> <ul style="list-style-type: none"> <li data-bbox="964 405 1442 548">• <b>Business Object:</b> Only available with <b>Late - Assign object with bar code</b> mode. If you are using Archive Export with Intelligent Capture for Invoices, then use: <b>BUS2081</b> for the <b>Business Object</b>.</li> <li data-bbox="964 562 1442 726">• <b>User Defined Document ID:</b> If you need to supply your own DocID value rather than using an SAP-generated DocID, select the <b>User Defined Document ID</b> check box. Doing so enables the <b>Document ID</b> field. <ul style="list-style-type: none"> <li data-bbox="997 741 1446 1052">– <b>Document ID:</b> Type a document ID in this field. To use an IA Value that is defined in one of the module instances of the batch, select the <b>Browse</b> button to the right of the field to display the <b>Choose Value</b> window and select the IA Value. The <b>Document ID</b> must be a unique value for each document you export, so you should specify an IA Value that is unique for each document in this field.</li> </ul> </li> </ul> <p data-bbox="1032 1066 1430 1243">If this option is not enabled, a unique DocID is automatically generated at export time for each document. This ID is a 32-character sequence of hexadecimal characters, which is always unique.</p>

## Related Topics

[“Creating, Editing, or Deleting Document Definitions” on page 22](#)

[“Specifying an Archiving Mode” on page 26](#)

[“Selecting the Document Definition for Export” on page 23](#)

### 2.3.1.3.2 Indexes tab

The **Indexes** tab in the **Definition Properties** window contains settings that define what SAP index fields are populated. Generally, only populate SAP index fields when using Early Archiving mode. When using Late Archiving mode, the SAP R/3 system will already contain all indexing data associated with the document being exported. In that case, the barcode value specified in the **Workitem** section of the **General** tab links the exported image data to the existing administrative data.

**Table 2-17: Definition Properties Window, General tab**

Element	Description
SAP Indexes	<p>Create, edit or delete an SAP index field.</p> <ul style="list-style-type: none"> <li>• <b>New:</b> Creates a new SAP index field from the <b>New SAP Index</b> window.</li> <li>• <b>Edit:</b> Select an existing index field and click <b>Edit</b> to modify its properties from the <b>New SAP Index</b> window.</li> <li>• <b>Delete:</b> Deletes an existing SAP index field</li> </ul>

### Related Topics

[“Creating, Editing, or Deleting Document Definitions” on page 22](#)


### 2.3.1.3.3 Image tab

The **Image** tab in the **Definition Properties** window contains settings that define the source and type of image document to store. For image files, you can specify the file type, format, and compression parameters.

**Table 2-18: Definition Properties Window, Image tab**

Element	Description
File Value	The file for the source document. The source file can be any of the <i>&lt;InputImage&gt;</i> or <i>&lt;OutputImage&gt;</i> files in the entire process, or they can be any of the level 0 through 7 Input file values as defined in the <i>MDF</i> .
Copy the file without modification	This option exports the image “as is”, without converting the image. This can be any file type.

Element	Description
Save the file with these settings	<p>(For image file types only) This option converts the image to the format specified. For more information, see <a href="#">Supported document classes</a>.</p> <ul style="list-style-type: none"> <li>• <b>File Type:</b> The file format to be exported.</li> <li>• <b>Color Format:</b> Controls the color level for the exported file.</li> <li>• <b>Compression:</b> The compression type to apply to the image file.</li> <li>• <b>Merge Annotations:</b> Annotations should be merged with the image data when saving.</li> </ul>

 **Note:** Merging annotations makes them a permanent part of the bitmap image with which they are associated. Unless you are exporting images in *TIFF* format, you must merge annotations if you want to keep them as a part of the exported image. As documents move through the Intelligent Capture system, annotation data is stored in TIFF tags within the image data. If exporting in another image format, or exporting TIFF images for viewing in an image viewing application that does not support display of annotation data stored in TIFF, merging annotations is required.


## Related Topics

[“Creating, Editing, or Deleting Document Definitions” on page 22](#)

[“Specifying the Image Properties of Document Definitions” on page 24](#)

### 2.3.1.4 Logon to SAP Server

If you did not specify login information for your batches, you can establish sessions from the **Logon to SAP Server** window.

 **Note:** If all your tasks have saved login information, then click **OK** in this window to open the production window.

**Table 2-19: Logon to SAP Server Window**

Element	Description
System Name	Type the name of the SAP R/3 system to which you want to connect; for example: <code>sapserver1</code> . Contact your administrator for a list of SAP R/3 system names.
Client	Type a client ID; for example: <code>900</code> . Contact your administrator for a valid <b>Client ID</b> .

Element	Description
User	Type your SAP R/3 system user name.
Password	Type the password that corresponds to the specified <b>User</b> name.
System Number	Type your SAP R/3 system number.
You will remain connected to the following sessions until the module exits	Lists the currently active sessions.
Disconnect	Disconnects from the selected session.

### Related Topics

[“Logging in to an SAP R/3 System for Archive Export Setup” on page 21](#)

#### 2.3.1.5 New/Edit SAP Index

Generally, only populate SAP index fields when using Early Archiving mode. When using Late Archiving mode, the SAP R/3 system will already contain all indexing data associated with the document being exported. In that case, the barcode value specified in the **Workitem** section of the **General** tab links the exported image data to the existing administrative data.

**Table 2-20: New/Edit SAP Index**

Element	Description
Index Name	Type the name of the SAP index field you want to map. You can specify a specific name or an IA Value that resolves to an SAP index field name when the module runs in production mode. To use an IA Value that is defined in one of the module instances of the batch, select the <b>Browse</b> button to the right of the field to display the <b>Choose Value</b> window, and then select the IA Value.
Index Value	Specify a value to export to the SAP index field. You can specify a specific value or an IA Value that resolves to the SAP index value you want to export when the module runs in production mode. To use an IA Value that is defined in one of the module instances of the batch, select the <b>Browse</b> button to the right of the field to display the <b>Choose Value</b> window, and then select the IA Value.

### Related Topic

[“Creating, Editing, or Deleting Document Definitions” on page 22](#)

### 2.3.1.6 Open Batch

The **Open Batch** window allows you to select a batch to run when you are in mode. This window can show all available batches, or you can select **Show only Batches with Tasks** and click the **Refresh** button to limit the list of batches.

### 2.3.1.7 Production Error

On attended machines, prompt for an operator response when errors are encountered during production by selecting the **Prompt for an action** check box from the **Errors** tab on the **Archive Export Setup** window. When an error occurs under this condition, the **Production Error** window displays stating the error message and error code as well as other relevant information about the batch, instance, and task. Select from the following options:

**Table 2-21: Production Error Window**

Element	Description
How do you want to handle this error	<ul style="list-style-type: none"> <li>• <b>Retry the current node:</b> Select this option when you can correct the error and, upon retry, the task is successfully completed.</li> <li>• <b>Stop all processing on this task:</b> Select this option when the task is causing the error. You stop task processing until the error is corrected.</li> <li>• <b>Continue with other nodes in this task:</b> Select this option when the node is causing the error. The node with an error is skipped as task processing continues with the other nodes.</li> </ul>
and set the batch's priority to 0	Select this check box to stop all batch processing. Unprocessed tasks that remain in the batch are stored on the Intelligent Capture Server until an administrator resets the batch priority to non-zero. Clear this check box if you want to keep processing the remaining tasks in the batch.
then stop waiting for tasks	Select this check box if you want to stop waiting for tasks. Until you select a processing mode, task processing stops at the client machine. Clear this check box when you want to continue processing tasks in the current processing mode.

## 2.3.2 Supported Document Classes

The following table describes supported document classes. The administrator specifies the image settings including selecting a document class during Archive Export module setup.

*MIME* types are set for the documents on the Content Server. Any document class not described does not have the MIME type set. Under these conditions, the Content Server determines the appropriate MIME type.

**Table 2-22: Supported Document Classes**

Document Class	Description	MIME Type
1263	IBM Lotus 1-2-3 application	application/vnd.lotus123
<i>ALF</i>	Internal format for stored print lists	application/x-alf
<i>BIN</i>	Binary data	application/octet-stream
BMP	Microsoft Windows Bitmap format	image/bmp
<i>CGM</i>	Format for annotations	application/x-cgm
<i>CSS</i>	Cascading Style Sheets style sheet language	text/css
<i>DOC</i>	Microsoft Word application	application/msword
<i>DOT</i>	Microsoft Word template	application/msword
<i>FAX</i>	Internal format for <i>TIFF</i> files	image/tiff
GIF	Graphics Interchange Format	image/gif
HTM	Hypertext Markup Language format	text/html
<i>HTML</i>	Hypertext Markup Language format	text/html
<i>HTML-WK</i>	eSuite spreadsheet application	text/html
<i>HTML-WP</i>	eSuite word processor application	text/html
<i>JPG</i>	Joint Photographic Experts Group format	image/jpeg
<i>JS</i>	JavaScript	text/javascript
LWP	IBM Lotus Word Pro application	application/vnd.lotus-wordpro
<i>MOV</i>	QuickTime movie	video/quicktime

Document Class	Description	MIME Type
MPP	Microsoft Project application	application/vnd.ms-project
<i>MWP</i>	IBM Lotus Word Pro template	application/vnd.lotus-wordpro
<i>OTF</i>	Internal format for outgoing documents	application/x-otf
<i>PCX</i>	Pixel graphics	image/pcx
PDF	Portable Document Format	application/pdf
<i>PPT</i>	Microsoft PowerPoint application	application/vnd.ms-powerpoint
<i>PRZ</i>	Lotus Freelance Graphics application	application/vnd.lotus-freelance
<i>PS</i>	PostScript® format	application/postscript
RAW	Internal format for SAP Editor	application/x-raw
<i>REO</i>	Internal format for archive files	application/x-reo
<i>RPT</i>	Crystal Reports	application/x-rpt
RTF	Rich Text Format	application/rtf
<i>SCR</i>	Internal format for SAP script documents	application/x-scr
<i>STL</i>	Stereolithography format	application/x-stl
TIF	Tag Image File format	image/tiff
TXT	Text format	text/plain
<i>VBS</i>	VBScript format	text/vbscript
<i>VSD</i>	Microsoft Visio application	application/vnd.visio
XLS	Microsoft Excel application	application/vnd.ms-excel
XML	Extensible Markup Language	text/xml
XSL	Extensible Stylesheet Language	text/xsl

## 2.3.3 IA Values

The topics in this section describe IA values that can be used with this application.

### 2.3.3.1 Input IA Values

Input IA Values include input file variables, such as `Level0_InputFile1`, which serve as pointers to stage files and input processing variables. These files and variables store setup data that a module uses to process tasks and include default and user-defined module settings.

Following are the IA Values defined in `exsapa1.mdf`, the Archive Export *MDF*. Although possible to add custom variables to this MDF, it is recommended that you use dynamic values in your *IPP* or create a custom MDF for your variables so they are not overwritten when updating the product.

**Table 2-23: Input IA Values**

IA Value	Description
Input file variables	
<InputImage>	<p>The input image of task on the Intelligent Capture Server. &lt;InputImage&gt; can be any type of image file processed by upstream modules. Use of an &lt;InputImage&gt; is optional; the module can export file values from other modules in the process.</p> <ul style="list-style-type: none"> <li>• <b>Attributes:</b> File, Input, NoTrigger</li> <li>• <b>Level:</b> 0</li> </ul>
<Level<n>_InputFile>	<p>The input file for the task on the Intelligent Capture Server at the specified level, &lt;n&gt;.</p> <ul style="list-style-type: none"> <li>• <b>Attributes:</b> File, Input</li> <li>• <b>Level:</b> &lt;n&gt;, where &lt;n&gt; = 0-7</li> </ul>
Input values	
<Ready>	<p>A secondary trigger value that can be used when no file values are specified or when another trigger is needed to adequately control the beginning of processing.</p> <p>If this value is used in the IPP, then it is a trigger. When all trigger values are non-zero, the module processes the current task.</p> <ul style="list-style-type: none"> <li>• <b>Attributes:</b> File, Input</li> <li>• <b>Level:</b> T</li> </ul>

IA Value	Description
<Level<n>_Processed>	<p>Setting this value to 1 indicates that this node has already been processed (and can be skipped if configured to do so in setup).</p> <ul style="list-style-type: none"> <li>• <b>Attributes:</b> Long, Input, NoTrigger</li> <li>• <b>Level:</b> &lt;n&gt;, where &lt;n&gt; = 0-7</li> </ul>

### 2.3.3.2 Output IA Values

Output IA Values include output processing variables which store data generated by the module during processing. The module does not output any files to the Intelligent Capture Server. There are no File-type output values.

**Table 2-24: Output IA Values**

IA Value	Description
Output file variables	
<Level0_DocID>	<p>When a task is processed, this value contains the <b>Document ID</b>, which is normally generated by the SAP R/3 system and is written back to the Intelligent Capture Server.</p> <ul style="list-style-type: none"> <li>• <b>Attributes:</b> String, Output</li> <li>• <b>Level:</b> 0</li> </ul>
<Level0_Barcode>	<p>This value is the barcode used during archiving. If no barcode was defined during setup, then the module creates a globally unique identifier (<i>GUID</i>) and stores it in this IA Value upon return.</p> <ul style="list-style-type: none"> <li>• <b>Attributes:</b> String, Output</li> <li>• <b>Level:</b> 0</li> </ul>
Output status and error variables	
<ErrorNumber>	<p>The error number of the error, if any, that occurred while processing this task.</p> <ul style="list-style-type: none"> <li>• <b>Attributes:</b> Long, Output</li> <li>• <b>Level:</b> T</li> </ul>
<ErrorText>	<p>The text string of the error, if any, that occurred while processing this page.</p> <ul style="list-style-type: none"> <li>• <b>Attributes:</b> Long, Output</li> <li>• <b>Level:</b> T</li> </ul>

IA Value	Description
<ExportResult>	<p>If all documents contained by the task were exported successfully, then this variable is set to zero. Otherwise, this variable contains a negative number indicating the error.</p> <p>You can check this variable in a <b>Finish</b> event handler after export to determine whether any documents need to be re-exported again. To determine which documents need to be re-exported, check the &lt;Level&lt;n&gt;_ErrorNumber&gt; and &lt;Level&lt;n&gt;_ErrorText&gt; IA Values for the node where the error occurred.</p> <ul style="list-style-type: none"> <li>• <b>Attributes:</b> Long, Output</li> <li>• <b>Level:</b> T</li> </ul>
<Level<n>_ErrorNumber>	<p>The error number of the error, if any, that occurred while processing this task.</p> <ul style="list-style-type: none"> <li>• <b>Attributes:</b> Long, Output</li> <li>• <b>Level:</b> T</li> <li>• <b>Example:</b> &lt;Level2_ErrorNumber As Long,Output&gt;</li> </ul>
<Level<n>_ErrorText>	<p>The text string of the error, if any, that occurred while processing this page.</p> <ul style="list-style-type: none"> <li>• <b>Attributes:</b> String, Output</li> <li>• <b>Level:</b> T</li> <li>• <b>Example:</b> &lt;Level3_ErrorText As String,Output&gt;</li> </ul>
<Level<n>_Processed>	<p>A value that is set to 1 when the level 0 nodes of the task have all been processed.</p> <ul style="list-style-type: none"> <li>• <b>Attributes:</b> Long, Output</li> <li>• <b>Levels:</b> T</li> <li>• <b>Example:</b> &lt;Level6_Processed As Long,Input,Output,NoTrigger&gt;</li> </ul>
Output statistical variables	
<StartTime>	<p>The time at which processing on the current task began. This value is in the format of the client system's long time format.</p> <ul style="list-style-type: none"> <li>• <b>Attributes:</b> String, Output</li> <li>• <b>Level:</b> T</li> </ul>

IA Value	Description
<StartDate>	<p>The date on which processing on the current task began. This value is in the format of the client system's short date format.</p> <ul style="list-style-type: none"> <li>• <b>Attributes:</b> String, Output</li> <li>• <b>Level:</b> T</li> </ul>
<EndTime>	<p>The time at which processing on the current task completed. This value is in the format of the client system's long time format.</p> <ul style="list-style-type: none"> <li>• <b>Attributes:</b> String, Output</li> <li>• <b>Level:</b> T</li> </ul>
<EndDate>	<p>The data on which processing on the current task completed. This value is in the format of the client system's short date format.</p> <ul style="list-style-type: none"> <li>• <b>Attributes:</b> String, Output</li> <li>• <b>Level:</b> T</li> </ul>
<TotalTime>	<p>Total processing time of the current task in milliseconds.</p> <ul style="list-style-type: none"> <li>• <b>Attributes:</b> Long, Output</li> <li>• <b>Level:</b> T</li> </ul>
<Level<n>_StartTime>	<p>The time at which processing on the current page began. This value is in the format of the client system's long time format.</p> <ul style="list-style-type: none"> <li>• <b>Attributes:</b> String, Output</li> <li>• <b>Level:</b> 0-7</li> <li>• Example: Level7_StartTime as String, &lt;Output&gt;</li> </ul>
<Level<n>_StartDate>	<p>The date on which processing on the current page began. This value is in the format of the client system's short date format.</p> <ul style="list-style-type: none"> <li>• <b>Attributes:</b> String, Output</li> <li>• Level: 0-7</li> <li>• Example: &lt;Level5_StartDate as String, Output&gt;</li> </ul>
<Leveln_EndTime>	<p>The time at which processing on the current page completed. This value is in the format of the client system's long time format.</p> <ul style="list-style-type: none"> <li>• Attributes: String, Output</li> <li>• <b>Level:</b> 0-7</li> <li>• Example: &lt;Level5_EndTime as String, Output&gt;</li> </ul>

IA Value	Description
<Level<n>_EndDate>	<p>The date on which processing on the current page completed. This value is in the format of the client system's short date format.</p> <ul style="list-style-type: none"><li>• <b>Attributes:</b> String, Output</li><li>• <b>Level:</b> 0-7</li><li>• <b>Example:</b> &lt;Level6_EndDate as String,Output&gt;</li></ul>
<Operator>	<p>The user name of the operator who is logged into the module.</p> <ul style="list-style-type: none"><li>• <b>Attributes:</b> String, Output</li><li>• <b>Level:</b> T</li></ul>

## Chapter 3

# Documentum Advanced Export

This section includes the Intelligent Capture specialized enterprise export module: **ecpcore-cxm**.

For information about common features and functionalities in the Intelligent Capture client modules, see *OpenText Intelligent Capture - Module Reference (ECPCORE-CMD)*.

This section presents users with conceptual information about the Documentum Advanced Export application and step-by-step instructions on how to use it. The topics cover basic overview information and introduce the features and functions of the application.

### 3.1 Understanding the Documentum Advanced Export\* Module

Use the Documentum Advanced Export module to:

- Specify objects for export
- Define properties for each object
- Export documents to new or existing objects in the Documentum system.

An object is any item that can be manipulated, such as documents, cabinets, and folders.

The following Documentum features can be managed from the Documentum Advanced Export module:

- **Export object definitions:** Specify objects and corresponding object properties to store in a Documentum repository. Specify new objects to store in the Documentum repository. Define object properties, or search for an existing object and add content to it or modify its properties. Supported object types include built-in object types, custom object types.
- **Documentum high volume server (HVS) supported features:** Export content as materialized *LWSO* created using Documentum. Additional HVS - supported features include batching for faster export throughput, as well as repository partitioning.
- **Object Security:** Designate the owners of newly created documents. All the users need access to the specified Documentum repository. Documentum automatically populates a list of authorized users.

- **Flexible export lists:** Design a flexible export list containing objects and renditions within a Documentum repository. All definitions can be exported to one or more folders and cabinets.
- **Attribute mapping:** Map fixed values or IA Values to Documentum single-value and repeating attributes for each object specified in an export list. When exporting an object, provide values for the attributes that are specific to that object.
- **Object searching:** Implement an object search to find and export to an existing document. Documentum Advanced Export allows searches using DQL command, path, ID, and searches using a repository tree view pane.
- **Extended version control:** Documentum Advanced Export supports major, minor, and branch versioning. Exporting a branch version is useful when the current version of the document is locked.
- **Documentum business process workflows:** Initiate a workflow based on a process template. Use IA Values in the *IPP* to assign different types of documents in a batch to different packages in a process.
- **Document lifecycle:** Select a user or group associated with an existing Documentum lifecycle to specify who reviews, promotes, or demotes a document.
- **Document linking:** Link one or more available documents to several folders.
- **Simultaneous rendition:** Simultaneously export a document along with separate copy of the document in a different format. For example, export both a rendition of a redacted version and a rendition of the scanned original.
- **Aspect attachment:** Attach aspects and set properties to customize an instance of an object type.
- **Inbox assignment:** Assign objects to a user inbox, set object priority, and send an email notification to the owner of the inbox queue when an event occurs.



**Tip:** The Documentum documentation contains more information about Documentum-specific features.

## Related Topics

[“Setting Up Exporting” on page 57](#)

## 3.2 Understanding the Documentum Repository

When logged in to a Documentum repository, Documentum Advanced Export syncs with Documentum. Synchronizing enables accessing and viewing current Documentum user privileges, attributes, security, and documents currently on the Documentum repository. This capability enables creating object definitions, adding renditions, linking between documents, and managing version handling, formats, relationships, and Documentum processes.

The Documentum online help contains more information about the Documentum repository.

### Related Topics

“Connecting to a Documentum Repository” on page 56

“Setting Up Exporting” on page 57

## 3.3 Understanding DFC Permissions

DFC runtime components use the C:\Documentum folder to store client cache, session-related data, logs, and other information. By default, members of local users group do not have write permission to this folder. To instantiate properly, the Documentum administrator must grant folder permissions to the user who is supposed to run Documentum Advanced Export.

DFC creates a unique dmc1 folder in the same folder the module or client-side script is running in. By default, members of non-administrators groups do not have write permissions to this folder and its sub-folders. When Documentum Advanced Export is running from the account of user without write permissions to this folder, then DFC may not work properly and report exceptions. The Documentum administrator must grant permissions to each instance of the dmc1 folder.

The system requirements in the *Intelligent Capture Release Notes* (available in My Support (<https://support.opentext.com/>)) contains more information.

## 3.4 Setting Up Documentum Advanced Export

Most configuration information for Intelligent Capture client modules is defined during *module setup*. You can run a module in setup mode from Intelligent Capture Designer, from Intelligent Capture Administrator, or from a command prompt with appropriate arguments. For more information, see *OpenText Intelligent Capture - Module Reference (ECPCORE-CMD)*.

When launched in setup mode, a client module displays the **Setup** window in which you can specify the module's configuration settings.

### 3.4.1 Connecting to a Documentum Repository

To run Documentum Advanced Export for setup, specify a Documentum repository to export documents to. Then, enter the following information into the **Repository** tab on the **Definition Settings** panel. The first time the module runs for a specific batch setup, the **Definition Settings** panel displays the **Repository** tab by default. To access the **Repository** tab on a subsequent login, click the **Repository** icon at the top of the definition list.

#### To connect to a Documentum repository:

1. Run Documentum Advanced Export for setup, and then click **Definitions**. The **Definition Settings** pane displays.
2. From the **Repository** list, select the Documentum repository to export documents to.
3. Enter the Documentum user name in the **User** field, and enter the user password in the **Password** field.



**Note:** If the specified Documentum repository credentials match the Windows login and password, then select **Use Windows login** to bypass entering login information in the future.

4. In the **Domain** field, enter the domain of the server on which the Documentum repository resides.



**Note:** If the Documentum repository is installed on a machine that is not a part of a domain, then the **Domain** field must be left blank. If the Documentum repository is installed on a UNIX machine, then the **Domain** field does not display.

5. The **Auto-connect at next setup time** check box controls whether the user's password is saved to the step settings. Selecting the check box results in the password being stored to step settings and lacks security. Clearing the check box ensures that only the repository name and user name are saved to the step settings. When you clear this check box, you must login to the module using the `-loginex` command line argument. Users can specify multiple `-loginex` arguments in the command line for different repositories and users. During task processing, the module matches the repository name and user name specified in the `-loginex` command line argument with the same repository and user name as specified in setup and uses the password from the specified `-loginex` command line argument. Note that when you install this module as a service and provide `-loginex` command line argument, the installed service replaces the parameters with encrypted `-loginexenc` command line arguments. This functionality provides a secure method of storing passwords for repository accounts used by the module.
6. Click **Connect**. The **Status** field displays connectivity success. The name of the specified Documentum repository displays, followed by either **Ready** or **Needs repository connection**.

## Related Topics

“Setting Up Exporting” on page 57

“Processing Rescan Requests from the Documentum Repository” on page 84

“Passing Non-Image Files Directly to Documentum” on page 82

“Understanding DFC Permissions” on page 55

### 3.4.2 Setting Up Exporting

Once connected to the Documentum repository, click **Definitions** to access the **Definition Settings** panel. The **Definition Settings** panel has a series of tabs available to manage document export definitions, including properties, actions, security, and output format. Use the definition list to select objects, build paths, links, renditions, and navigate to other objects within the Documentum repository. Documentum Advanced Export supports standard objects as well as custom object types created using Documentum.



**Note:** The primary content, or a definition which creates primary content, must exist before renditions or linking can function.

For more information on the Documentum features and concepts mentioned in this section, use the Documentum online help.

#### 3.4.2.1 Editing the Definition List

Create flexible export lists by mapping objects for export in the definition list. For example, more than one **Document** definition can be placed under the same **Folder** definition. Moreover, different settings can be specified for each of these **Document** definitions. For example, using IA Values or naming schemas, a static `object_name` value is specified for the first **Document** definition, and different `object_name` values for the second definition.



**Note:** An entire export tree is created each time an `object_name` value is changed for a Documentum object. There are cases when such changes can affect all other objects in definition list.

#### To edit the definition list:

1. Run Documentum Advanced Export for setup, and then click **Definitions**. The **Definition Settings** pane displays.
2. Click the **Repository** icon in the lower left-hand side of the **Definition Settings** pane. Create an object definition list and define a path for export to the Documentum repository.




**Note:** The existing objects in the repository do not display in the definition list unless added and assigned to the export definition using the **Actions** list.






- Use the tabs of the **Definition Settings** panel to define additional settings for each object intended for export.



### Definition List Icons

Click **Actions** or right-click any of the Documentum objects in the definition list to display the **Actions** list. Available objects display in color when valid, or dimmed when invalid. The following table describes the role of each icon in the definition list and **Actions** list.

 **Note:** To display updates to the Documentum repository tree, press **F5** or select **Refresh repository structure information** from the **Actions** list.

**Table 3-1: Definition List Icons**

Icon	Role	Description
	Repository icon	By default, the definition list displays the name of the repository adjacent this icon for adding objects for export to. Objects that can be added at this first level in the definition list are <b>Cabinet</b> objects, existing <b>Document</b> objects, and existing <b>Folder</b> objects.
	Cabinet icon	By default, the <b>Cabinet</b> object is set to search for an existing object by path on the <b>Object</b> tab. To create a <b>Cabinet</b> object in the repository, select <b>Create a new object</b> .
	Folder icon	When listed at the first level as <b>ExistingFolder&lt;n&gt;</b> , a magnifying glass displays over the icon, and an existing object must be assigned on the <b>Object</b> tab.
	Document icon	When listed at the first level as <b>ExistingDocument&lt;n&gt;</b> , a magnifying glass displays over the icon, and an existing object must be assigned on the <b>Object</b> tab.
	Rendition icon	The <b>Rendition</b> object can only be added to <b>Document</b> objects.

Icon	Role	Description
	Aspect icon	The <b>Aspect</b> object can be added to any object of type <code>dm_sysobject</code> or its subtypes.
	Link icon	Add <b>Link</b> objects from within <b>Folder</b> or repository objects to objects in different containers.

### Editing the Name of an Object Definition

Object names can be modified within the definition list.

 **Note:** Aspect names cannot be changed.

#### To change the name of an object definition:


1. Click to select the object definition in the definition tree.
2. Click the text adjacent the object definition icon. A cursor displays in the highlighted text.
3. Change the name of the text, and then click **Apply**.

### Related Topics

- [“Understanding the Documentum Repository” on page 55](#)
- [“Setting Up Exporting” on page 57](#)
- [“Editing the Definition List” on page 57](#)
- [“Adding Object Definitions” on page 59](#)
- [“Adding Object Links” on page 72](#)
- [“Exporting a Document as Multiple File Types” on page 74](#)

#### 3.4.2.2 Adding Object Definitions

This section explains how to define Documentum object settings in the **Object** tab of the **Definition Settings** pane. These settings include object type, whether to create an object for export, or search for an existing object by its path, ID, or a *DQL* query.

 **Note:** Information is available to fix long delays when retrieving large numbers of *ACLs* and User Objects during setup mode. For more information, see *OpenText Intelligent Capture - Administration Guide (EPCORE-AON)*.

Specify multiple **dm\_cabinet**, **dm\_document**, or **dm\_folder** object types. The object definitions appear in the definition list, enabling a tree view of how images are exported to the repository.

The following is a list of best practices for specific export settings:

- When exporting to an existing folder, browse to select the folder by its path.
- When setting up export for rescanned documents, use the object ID to locate the document. The ID is sent to Intelligent Capture by Documentum when instantiating a RescanPlus step.
- When multiple definitions are created in the export list that reference the same document object, only the first definition is exported.



**Note:** When triggering the module at a level higher than level 0, do not attempt to export multiple documents by using a level 0 name. For example, do not configure the module to export a node for every page while triggering at level 1. When the second identical node is encountered, export fails and the error, "There are multiple definitions in the export list that reference the same object. Only the first definition will be exported. Ignoring the definition <NewDocument1>. Please check batch settings." occurs.

#### To add object definitions:

1. Run Documentum Advanced Export for setup, and then click **Definitions**. The **Definition Settings** pane displays.
2. Right-click the Documentum repository icon or an icon representing a currently listed object in the definition list, and then select **Add definition**.

When adding a definition, the object added at the Documentum repository level must reference an existing object. For example, if a new document object is being exported, it must be exported to an existing cabinet or folder object in the selected Documentum repository.

3. Click to select the type of object that to be added. The text adjacent the object icons remains bold until a valid definition has been saved.

If the object is not a valid child of the selected object type, object icons in the **Actions** panel are dimmed. For example, the **Cabinet** icon and name are unavailable when a **Folder** object is selected.



**Note:** In certain regions, date/time values mapped to Documentum object attributes and stored in a Documentum repository do not exactly match the expected values. This behavior is based on the way the object mapping was configured in the Documentum Advanced Export module. There are two reasons for this discrepancy. The first one is that Java handles dates more precisely than Intelligent Capture. The second one is that certain regions adopted different timekeeping standards during various historical periods. Usually, the affected dates range 1900 - 1930.

4. (Optional) Select an object type from the **Object type** list box. Standard as well as custom object types designed for the selected Documentum repository appear in the list.

5. Choose an option in the **Select the Documentum object to be modified** area.  
For document objects being exported for the first time, the only option available is **Create a new object**. Documentum Advanced Export does not allow new **Cabinet** objects, so each of the options can be selected for existing **Cabinet** objects. When exporting to existing document and folder objects, use the search options so that Intelligent Capture locates the previously exported object. Then, add a new version or modify an existing object during export. To search by *IA Value* in any field, click **Insert Value**.
  - *Search for the object using its path*: Click **Browse** to display the **Select Path** window. Choose the object from the tree view.
  - *Search for the object using its ID*: Enter the ID of the previously exported object in the field.
  - *Search for the object using DQL*: Enter a DQL command, and then click **Test** to validate. Use the Documentum help for information on DQL commands.
6. For new objects being exported for the first time, select the **Attribute** tab, and then set the value of the `object_name` attribute. If updating an object that is already in the repository, skip this step. For more information, see [“Associating Attributes with an Object” on page 62](#).
7. Click **Apply**. If the object is valid, the text next to the icon is longer bold.

## Handling Export Query Results

The **Object** tab includes options that define how to handle an object that cannot be found, or multiple objects matching a query. These options are only relevant when one of the search fields is selected and contains search data in the **Select the Documentum Object to be Modified** section. By default, the exporter creates an object when a search does not return a Documentum object. When a query results in finding multiple Documentum objects, the default option is to use the first object found in the list. The alternative setting for either is to generate an error and follow the error setup rules. For more information about error setup, see [“Understanding Error Handling” on page 80](#).

## Exporting Materialized LWSO

Set up Documentum Advanced Export to export updated content of an object in the repository as materialized *LWSO*. This export applies to a “Shared” object and its child “LightWeight” object designed and installed into the Documentum Content Server. Definition settings for objects being exported as materialized LWSO are implemented the same as any **Document** type object.

## Related Topics

[“Editing the Definition List” on page 57](#)

[“Associating Attributes with an Object” on page 62](#)

[“Setting Object Permissions” on page 68](#)

“Adding Object Links” on page 72

“Exporting Document Objects to a Specified File Type” on page 65

“Exporting a Document as Multiple File Types” on page 74

“Starting a Documentum Process for Export” on page 76

### 3.4.2.3 Associating Attributes with an Object

Add attributes to describe the object or aspect being defined, and apply values. Objects being exported for the first time must have an `object_name` attribute applied to it. Attributes are either single-valued or repeating (multiple values), such as keywords.




#### Notes


- When exporting to an existing object in the Documentum repository, the Documentum Advanced Export module does not check the values of the existing object attributes. Depending on the repeating option specified, repeating attributes can be appended to the Documentum objects regardless of being sequential duplicates.
- When the *ACL* value in the Documentum repository is set to **Type**, and no permission set is specified for Documentum object type `dm_note`, the module cannot process tasks when a package note is specified for packages. Instead, an error displays indicating a missing ACL in the object type `dm_note`. This occurs because object types require an assigned ACL when the Inherit Permission Set From option, in the Documentum repository, is set to **Type**. Therefore, when selecting DCTM Advanced Export step settings in a process or batch that defines a package note, with the **Inherit Permission Set From** option set to Type in the target Documentum repository, an ACL must be defined for Documentum object type `dm_note`. Otherwise, export will fail.

#### To add an object definition attribute:

1. Run Documentum Advanced Export for setup, and then click **Definitions**. The **Definition Settings** pane displays.
2. In the definition list, select an object or aspect to map attributes to, and then click the **Attribute** tab.
3. Perform one of the following:
  - To map a single attribute to the selected object, click **New**.
  - To map the complete list of non-system attributes to the selected object, click **Map all**.
4. In the **Attribute name** field, click the arrow icon to expand the list box. Then, select the name of the attribute to apply to the current object definition. For new objects, be sure to add an `object_name` attribute.

 **Note:** To add system attributes to the options in the **Attribute name** list box with, select **Populate Documentum system attributes**.

5. (Repeating attributes only.) Select an option from the **Repeating** list box. For details of each option, see [“Choosing Repeating Attributes” on page 63](#).
6. In the **Value** field, double-click and type a unique value of the same data type listed in the **Data type** field (such as string). When the **Value** field is locked (dark blue), right-clicking the **Value** field displays the Insert IA Values menu..

 **Note:** For string data type attributes, do not enter in the **Value** field more characters than the maximum character length displayed in the **Max length** field. String attributes with values exceeding the maximum character length cause errors during export. To modify how attribute string length is handled and truncate the string on export, the `<TruncateAttributes>` IA Value must be set to 1.

7. Click **Apply**.

#### To delete an object definition attribute:

1. Run the Documentum Advanced Export module for setup. Select the batch number of the object definition to modify.
2. Select the object with the attributes to delete. Then, select the **Attribute** tab.
3. Select the attributes to delete. Then, click **Delete**. The keyboard shortcuts for selecting multiple items at a time are supported.
4. Click **Apply**.

### Choosing Repeating Attributes

A single-valued attribute, such as an ID, only has one unique value. Repeating attributes can have multiple values that are stored in the Documentum repository as a list. Use the **Repeating** column on the **Attribute** tab to set repeating attributes to append values or replace current values. When a non-appending value is selected from the **Repeating** column, type a zero-based number in the **Index** column on the **Attribute** tab. This number specifies a position for the value in the repeating attribute list. Because the appending value is always the final one in the repeating values list, it is unnecessary to specify the index.

#### Options listed in the Repeating column:

- **Append and skip the existing attribute items:** Adds the specified value to the end of the existing list of values for the repeating attribute. If the value is a duplicate value, it is not added to the list.
- **Append and skip sequential incoming duplicates:** Adds the specified value to the end of the existing list of values for the repeating attribute. Repeating attribute options are applied individually to each entry in the **Attributes** list, and not to each attribute. You can add repeating values from several IA Values with different repeating options.

- **Append to the end of list and include duplicates:** Adds the specified value to the end of the existing list of values for the repeating attribute. If the value is a duplicate of a previous value, it is still added to the list.
- **Insert before the index:** Inserts the specified value at a specific place in the list of values for the repeating attribute. Specify the index at which to start inserting values in the **Index** field. To insert the value at the beginning of the list, click the field and then type the number 0.
- **Replace the index:** Replaces an existing value with the specified new value for the repeating attribute. Specify the index at which to replace values in the **Index** field. This option is not typically used with page-level values because it continually replaces the same index each time a page is exported. This option is more useful for the attributes of folders when it is necessary to replace one attribute value with another.
- **Replace using page number as the index:** Replaces an existing value with the specified new value for the repeating attribute, using the page number of the document as the index number. Use this option to ensure a one-to-one correspondence between the order of the values and the order of the pages in the document.



**Notes**

- Users can configure the `DocumentumAdvancedExport.dll.config` file (located in the `InputAccel\client\binnt` folder by default) to ignore empty repeating attributes. Set the `SkipEmptyRepeatingAttribute` to `True` to ignore empty repeating attributes or set the attribute to `False` to use the empty repeating attributes.
- Users can configure the `DocumentumAdvancedExport.dll.config` file (default location: `InputAccel\client\binnt\` folder) when customers want to export flattened table data to a repeating attribute of a Documentum object. When table data is flattened (serialized to string), typed data is converted to string using invariant culture. To parse this data correctly irrespective of the regional settings on the machine running Documentum Advanced Export module, the `UseInvariantCultureForStringParsing` parameter must be set to `True` and the regional settings of machine running Documentum Advanced Export module must be configured to use `en-us` formatting. Note that this setting does not impact typed IA Values conversion to string.

“Example of a Repeating Attribute” on page 64 shows an authors attribute with two values as they would display in the first four columns on the **Attribute** tab. The two values are `authors[0]` and `authors[1]`. The repeating option is applied independently for each row - replacing the index for `Author[0]` and including duplicates for `Author[1]`.

**Table 3-2: Example of a Repeating Attribute**

Attribute name	Repeating	Index	Value
----------------	-----------	-------	-------

authors	Replace the index	0	Jack
authors	Append to the end of list and include duplicates	(Automatically indexed as the final value in the list. The <b>Index</b> field does not enable text entry in this case.)	Jill

## Related Topics

[“Editing the Definition List” on page 57](#)

[“Adding Object Definitions” on page 59](#)

### 3.4.2.4 Exporting Document Objects to a Specified File Type

Use the **Content** tab to specify:

- Whether to export content files
- A file type as image or non-image
- Documentum content type
- Compression settings for one or more content files with individual objects of the **Document** type.

If the **Multipage** option is not enabled, Documentum Advanced Export exports each multipage input file as a separate multipage content file. If the **Multipage** option is enabled, Documentum Advanced Export exports all multipage input file images to a single multipage content file. If the selected file type does not support multipage, Documentum Advanced Export exports only one image (the first image) from each multipage input file.



**Note:** If you are using IA Values or naming schema characters to create Documentum object names (such as document name = “document@1”), do not select the **Multipage** option. If you are exporting at level 0 without the **Multipage** option, set up the **Versions** tab for multiple documents that have the same name and path. If the process triggers export at level 0, but in **Open Batch** mode, then, the export module operates at level 7. It exports the entire batch in one operation. Without the **Multipage** option, single pages are exported, but the **Versions** tab information is not used. All of the pages in the batch are associated with one version of one document.

#### To modify export content file settings:

1. Run Documentum Advanced Export for setup, and then click **Definitions**. The **Definition Settings** pane displays.
2. Click the **Document** icon representing the object to modify export content file settings for in the definition list, and then select the **Content** tab.

3. Select an option from the **File Value** list box. The list is populated with file values that are available in your process file. These file values resolve to available content files that can be exported. For information on Documentum Advanced Export options, see [Documentum Advanced Export](#).

If the file type to export is a non-image type, use the file type containing the `<InputFile<n>>` IA Value. The list box also contains IA Values assigned to other modules listed by module step. The *IA Values* section in each module guide contains details about module-specific IA Values.

4. Select one of the following:
  - **Copy the file without modification (source can be any type):** Use this setting for non-image Documentum content types. Selecting this option disables additional settings in the export settings section. Make sure the **File Value** list box has the file type containing the Documentum Advanced Export `<StepName.><InputFile<n>>` IA Value.
  - **Save the file with these settings (source must be an image type):** Select this option, and then modify the settings.
    - From the **File Type** menu, select a file type.
    - From the **Color Format** list, select a color format. The options vary depending on the selected **File Type**.
    - From the **Compression** list, select a compression scheme. The available options vary depending on the options selected in the **Color Format** and **File Type** lists.
    - Select the **Multipage** check box to export all pages of the task as a single image file. This check box is only enabled when one of the types supporting multiple pages is selected from the **File Type** list box: **Compuserve (\*.GIF), TIFF (\*.TIF), MO:DCA Files (\*.MDA), FAX (\*.DCX), ADOBE (\*.PDF), or PDF/A (\*.PDF)**.
    - Select the **Merge Annotations** check box to burn annotations added by the Completion module into the image. When this option is not selected, any annotations added to an image are lost upon export into the Documentum system.
5. Select a content type from the **Documentum content type** list box.
 

To enable full-text indexing, select **Full text index**. This check box is only activated when certain content types are selected. These content types are listed in [“Documentum Content Types Enabling a Full Text Index”](#) on page 66 .
6. Click **Apply**.

**Table 3-3: Documentum Content Types Enabling a Full Text Index**

Acrobat PDF (pdf)	Legacy (legacy)	Microsoft Publisher: project (pub)	Quattro Pro 11.0 (Windows) (quattropro)
-------------------	-----------------	------------------------------------	---

Active Server Pages (asp)	Lotus 1–2–3 r3.0 (lotus)	Microsoft Visio Drawing (vsd)	Rich Text Format (rtf), rich text stream (richtext)
AMI Professional (amipro)	Lotus 1–2–3 r5 (123w)	Microsoft Word: each version listed except Microsoft Word 1.x (MacOS) (mswm1).	Run Length Encoded Bitmap (rle)
AutoCAD Drawing (acad)	MacPaint image (macp)	Microsoft Write 3.0, 3.1 (Windows) (winwrite)	Samna Word IV (Plus) (samna)
Documentum Type Definition (dtd)	MacWrite II (macwrite 2)	MultiMate 4.x (multimate)	Server Parsed HTML Document (shtml), Server Parsed HTML Document (sptml), Server Parsed HTML Document (stm)
Email Message (emcmf)	MASS 11 8.x (mass11)	Navy DIF (navydif)	Sun Raster Image (RAS)
Enable (enable)	Microsoft Excel: each version listed.	OfficeWriter 4.0, 5, 6.0–6.2 (officewrite)	Text Document (MacOS) (mactext), Text Document (Unix) (text), Text Document (Windows) (crtxt)
Freelance presentation (freelance)	Microsoft OneNote Notebook (one)	Outline Processor Markup Language Document (opml)	Total Word 1.2, 1.3 (totalword)
HTML Document (html)	Microsoft Outlook Express Electronic mail (eml)	Paradox 3.5, 4.0	VolksWriter (volkswrite)
IBM Writing Assistant 1.0 (writeassist)	Microsoft Outlook Message (msg)	Professional Write 2.1–2.2 (prowrite)	Wordstar (wordstar), Wordstar 2000 3.0, 3.5 (wordstar 2000)
Interface Definition Language (idl)	Microsoft Powerpoint: Most versions listed.	Published HTML Document (pub_html)	XML Document (xml)
Java Source File (java)	Microsoft Project: project (msproject), Microsoft Project Workspace (mpw)	Q&A Write (q&a)	XyWrite (xywrite)

## Related Topics

[“Editing the Definition List” on page 57](#)

[“Adding Object Definitions” on page 59](#)

[“Setting Object Permissions” on page 68](#)

[“Associating Attributes with an Object” on page 62](#)

### 3.4.2.5 Setting Object Permissions

Use settings on the **Permission** tab to set new object permissions and assign an owner to new objects. Object permissions can be Documentum default, inherited from object folder or type, user permissions, or a permission set from an alphanumeric sorted list populated by Documentum. The object owner can be set as the user currently logged on to Documentum, or another specific user for that object. Appropriate privileges on the Documentum server are necessary to specify another user as the owner of new objects.

In Documentum Advanced Export for setup, each password is stored as a protected IA Value in a batch or process. In production mode, the Documentum Advanced Export module extracts the password from this IA Value and uses it to connect to the Documentum repository. This behavior does not require any modification to the processes and batches converted from previous versions of Intelligent Capture.

To process batches converted from Intelligent Capture 5.3 and previous versions, the Documentum Server Export module used credentials from the command line argument `-loginex`. You can run Documentum Advanced Export as a service through the `QuickModuleHost.exe -install` command line. In this case, the service command line parameters contain the encrypted `-loginexenc` parameter instead of `-loginex`.

#### To set object permissions:

1. In the definition list, select the object to set permissions for, and then select the **Permission** tab.
2. Select the type of permission that is appropriate for the selected object. To apply a predefined permission to the object, select **Other**. Then, select the permission from the list box populated by settings available to the Documentum repository.
3. Perform one of the following:
  - To make the current user the owner, select **Current user**.
  - To make the owner a known user besides the current user, select **Specify user**. Then, select the user from the list box or click **Insert value** to display the **Choose Value** window to select an **IA Value** listed for the Documentum Advanced Export step name.
4. Click **Apply**.

#### Related Topics

[“Understanding DFC Permissions” on page 55](#)

[“Understanding the Documentum Advanced Export\\* Module” on page 53](#)

[“Editing the Definition List” on page 57](#)

### 3.4.2.6 Managing Multiple Versions of the Same Document

In Documentum, a version of a document is a revision of a previous document stored in the Documentum repository. Versioning supports content type updates, revision generation, and error handling. Versioning also cancels open checkouts during export and updates attributes when exporting to an existing document. Use the **Versions** tab to specify the actions the module takes if it finds an existing document with the same name in the Documentum repository.

The topics in this section explain how to handle document versioning.

#### 3.4.2.6.1 Defining Document Versioning

Use the **Version** tab to handle documents exporting to the same name and path, setting up minor, major, and branched versioning for updated documents.

##### To define document versioning:

1. Run Documentum Advanced Export for setup, and then click **Definitions**. The **Definition Settings** pane displays.
2. Select the document to apply versioning to, and then select the **Version** tab.
3. From the **When a document already exists with the same name and path** list box, select the appropriate version. Or, select the handling behavior for this scenario. The default setting is **Create a new document with the same name**.
  - **Create a new document with the same name:** If a document with the same `object_name` attribute exists, create a document with the same name, without affecting the existing document.
  - **Modify the current version:** If a document with the same `object_name` exists, update it without changing the major, minor, or branched version number of the object.
  - **Create a new major version of the document:** If a document with the same `object_name` attribute exists, create a major version of the current version of the document. The version number increments to the next major version number. For information on how to modify these test conditions, see [“Choosing Test Conditions” on page 70](#).
  - **Create a new minor version of the document:** If a document with the same `object_name` attribute exists, create a minor version of the current version of the document. The version number increments to the next minor version number. For information on how to modify these test conditions, see [“Choosing Test Conditions” on page 70](#).
  - **Create a new branched version of the document:** If a document with the same `object_name` attribute exists, create a branch of the existing document. The branch version number is appended. The existing document remains the current version. For information on how to modify these test conditions, see [“Choosing Test Conditions” on page 70](#).

- **Delete the document and replace it with a new one:** If a document with the same `object_name` attribute exists, delete the existing document and create another one.
  - **Generate an error and take action defined by the error setup:** If a document with the same `object_name` attribute exists, generate an error to handle as defined in the **Errors** tab.
4. When a create/modify version option is selected from the **When a document already exists with the same name and path** list box on the **Version** tab, the options under **When a document already exists** activate. For information on how to modify these test conditions, see [“Choosing Test Conditions” on page 70](#).
  5. (Optional) Select **Update attributes when exporting to an existing document** to change or add to the attributes of an existing document.
  6. (Optional) To cancel a document that a user currently has checked out during export, select **If the document is already checked out then cancel the current checkout**.  
  
When canceling checkout status of documents, user logged in to the module during production must have super user privileges.
  7. Click **Apply**.

## Related Topics

[“Editing the Definition List” on page 57](#)

[“Understanding Error Handling” on page 80](#)

[“Adding Object Definitions” on page 59](#)

### 3.4.2.6.2 Choosing Test Conditions

Use the **Version** tab to set test conditions that determine how to handle objects exported to a document location that exists.

The options under **When a document already exists** enable handling the exported document in the following conditions:

- If the existing document content type does not match
- If its type matches the primary content of the existing document
- If the existing document contains the type of exported document as a rendition.

If a test case is satisfied during production, then any remaining conditions are skipped. Select the appropriate version or error handling behavior for this scenario from the list boxes.

- **Does not contain this content type**
- **Contains this type as primary content**

- **Contains this type as a rendition**



**Note:** When the **Add new file content after existing content** option is selected from the **Contains this type as primary content** list, then the module adds the content file after the existing one. To view both content files and retrieve the additional pages, use an application that is aware of multiple content files.

#### To modify test conditions:

1. Select the document to apply versioning to, and then select the **Version** tab.
2. Enable the features listed under **When a document already exists and**. To enable these features, select one of the following options under **When a document already exists with the same name and path**.

- **Modify the version marked current inside Documentum**
- **Create a new major version of the document**
- **Create a new minor version of the document**
- **Create a new branched version of the document**

The [“Defining Document Versioning” on page 69](#) section contains more details about these features.

3. Select a test condition from the **Does not contain this content type** list.
  - **Create a new rendition:** If a document with the same `object_name` attribute exists, but has a different content type, create a rendition of the document.
  - **Replace the primary content with this content type:** If a document with the same `object_name` attribute exists, but has a different content type, delete its primary content. Also delete all of its renditions, and replace them with the new primary content, making it the primary document.
  - **Generate an error, take action defined by the error setup** (default): If a document with the same `object_name` attribute exists and contains this object type as a rendition, then generate an error. The error is handled as defined in the **Error Handling Settings** pane.
4. Select a test condition from the **Contains this type as primary content** list.
  - **Replace the existing primary content:** If a document with the same `object_name` attribute exists, and its content type is the same, delete the existing primary content. Also delete all of its renditions and replace them with the new content, making it the primary document.
  - **Add new file content after existing content:** If a document with the same `object_name` attribute exists, and its content type is the same, append the new content. The new content is appended to the existing document of that content type.
  - **Generate an error, take action defined by the error setup** (default): If a document with the same `object_name` attribute exists and contains this

object type as a primary content, generate an error. The error is handled as defined in the **Error Handling Settings** pane.

5. Select a test condition from the **Contains this type as a rendition** list.
  - **Replace the primary content with this content type:** If a document with the same `object_name` attribute exists, but has the same content type as a rendition, delete its primary content. Also delete all of its renditions, and replace them with the new primary content, making it the primary document.
  - **Replace the existing rendition:** If a document with the same `object_name` attribute exists, and one of its renditions has the same content type, replace that rendition with the new content.
  - **Add new file content after existing rendition:** If a document with the same `object_name` attribute exists, and one of its renditions has the same content type, append the new content to the existing rendition
  - **Generate an error, take action defined by the error setup** (default): If a document with the same `object_name` attribute exists but has a different content type, generate an error. The error is handled as defined in the **Error Handling Settings** pane.
6. (Optional) To update the attributes when exporting to an existing document, select the **Update attributes when exporting to an existing document** check box.
7. (Optional) To cancel the checkout of an existing document during export, select the **If the document is already checked out then cancel the current checkout** check box.
8. Click **Apply**.

### 3.4.2.7 Adding Object Links

Document linking is like shortcuts in Windows. The document can be accessed from another folder and all links are modified at the same time. Add a document link within **Cabinet** or **Folder** objects.



**Note:** A **Cabinet** or **Folder** can contain only one link. A link within a **Cabinet** object can be linked from, but not linked to.

#### To add a link definition:

1. Run Documentum Advanced Export for setup, and then click **Definitions**. The **Definition Settings** pane displays available objects in the definition list.
2. In the definition list, click the **Cabinet** or **Folder** icons that contain the object link, and then click **Actions**. The **Actions** panel displays.
3. Click **Actions**, and then select **Link**.
4. Type a link name in the **Definition name** field, and then select the **Link** tab.

5. To link an object in the definition list to the parent list definition object, select the objects from the **Available objects** pane. Then, click the right arrow button to move the object to the **Objects to link** pane. Only objects outside of the folder containing the link display in the **Available objects** pane.
6. Click **Apply**.

## Related Topics

[“Editing the Definition List” on page 57](#)

[“Adding Object Definitions” on page 59](#)

[“Setting Object Permissions” on page 68](#)

[“Associating Attributes with an Object” on page 62](#)

[“Exporting Document Objects to a Specified File Type” on page 65](#)

[“Exporting a Document as Multiple File Types” on page 74](#)

[“Starting a Documentum Process for Export” on page 76](#)

### 3.4.2.8 Using a Document Lifecycle

During module setup, use the Documentum Advanced Export module to assign a predefined document lifecycle to a **Document** object from the **Lifecycle** tab. Within Documentum, a document lifecycle is a series of states (such as “review”, “rejected”, or “approved”) through which an object must pass. The lifecycle maintains state information and enables automated processing for each state. The Documentum documentation contains information on how to create a document lifecycle or modify an existing one.



**Note:** Each field on the **Lifecycle** tab is restricted to 16382 characters.

#### To apply a lifecycle to a Document upon export:

1. Run Documentum Advanced Export for setup, and then click **Definitions**. The **Definition Settings** pane displays.
2. Click the **Document** icon representing the object to apply a lifecycle to in the definition list, and then select the **Lifecycle** tab.
3. To apply a lifecycle to the **Document**, select **Use these document lifecycle settings**.
4. Select a lifecycle from the **Document lifecycle** list box.

To apply an IA Value, click **Insert value** to display the **Choose Value** window, and then select an **IA Value** listed for the Documentum Advanced Export step name.

5. Select the initial lifecycle state of the **Document** from the **State** list box. The list only contains lifecycle states associated with the object type that can be attached. If the Documentum administrator included a description when creating the selected state, the text displays in the **Description** box.  
To apply an IA Value, click **Insert value** to display the **Choose Value** window, and then select an **IA Value** listed for the Documentum Advanced Export step name.
6. Select a user or group associated with the lifecycle from the **Alias set** list box to determine who reviews, promotes, or demotes the document. Click **Insert value** to display the **Choose Value** window, and then select an **IA Value** listed for the Documentum Advanced Export step name.
7. Click **Apply**.

### Related Topics

[“Adding Object Definitions” on page 59](#)

[“Setting Object Permissions” on page 68](#)

[“Associating Attributes with an Object” on page 62](#)

### 3.4.2.9 Exporting a Document as Multiple File Types

A rendition is a copy of the primary content in a different file format. Set up the document properties to create one or more renditions of a document object in a different format. Each rendition is a part of the document. The tabs available for a rendition definition are **Object**, **Content**, and **Version**.

#### To add a Document rendition definition:

1. Run Documentum Advanced Export for setup, and then click **Definitions**. The **Definition Settings** pane displays.
2. Right-click the **Document** icon representing the object to make a rendition of in the definition list. The **Actions** panel displays.
3. Click **Actions**, and then select **Rendition**.
4. Click the **Content** tab, and then select a rendition content type from the **Documentum content type** list box.
5. (Optional) Click the **Version** tab to apply version handling. For instructions, see [“Managing Multiple Versions of the Same Document” on page 69](#).
6. Click **Apply**.

### Related Topics

[“Adding Object Definitions” on page 59](#)

[“Setting Object Permissions” on page 68](#)

[“Associating Attributes with an Object” on page 62](#)

[“Exporting Document Objects to a Specified File Type” on page 65](#)

### 3.4.2.10 Exporting an Aspect of a Document

Attach a predefined Documentum aspect to modify behavior or records metadata for an instance of a dm\_sysobject or its subtype. Select a custom aspect for specific business logic associated with an object from the **Actions** menu. Objects do not necessarily have multiple instances of a specific aspect attached. They can have multiple unique aspects attached. To attach instance-specific metadata to an object, you can define properties for an aspect.

#### To attach a Documentum aspect definition:

1. Run Documentum Advanced Export for setup, and then click **Definitions**. The **Definition Settings** pane displays.
2. Right-click the icon representing the object to attach an aspect to in the definition list.
3. Click **Actions**, and then select **Aspect**.
4. On the **Object** tab, select an **Object** type from the list. When a different type of aspect is selected, the name of the annotation automatically changes in the definition list.
5. Make any additional changes necessary in the **Object** tab, and then click the **Attribute** tab. For instructions, see [“Adding Object Definitions” on page 59](#).
6. Click **New** to select an attribute from the **Attribute** name menu. For instructions, see [“Associating Attributes with an Object” on page 62](#).
7. Click **Apply**. If any required attributes have not been set, they are added to the attribute tab, with the cursor in the setting.

#### Related Topics

[“Editing the Definition List” on page 57](#)

[“Adding Object Definitions” on page 59](#)

[“Setting Object Permissions” on page 68](#)

[“Associating Attributes with an Object” on page 62](#)

[“Exporting Document Objects to a Specified File Type” on page 65](#)

### 3.4.2.11 Starting a Documentum Process for Export

From the **Process** tab, set an object to initiate a predefined Documentum process upon export. Select packages to assign the object to, append notes, and specify process email recipients. A process definition is a part of a workflow containing a set of activities in a specific business process. The Documentum documentation contains information about how to create a Documentum process definition and save it as a `dm_process` object in a Documentum repository.



#### Notes

- In previous versions of Documentum Advanced Export, changing a process definition reset all package settings. Beginning with Documentum Advanced Export 6.5, package settings made for the original process definition are retained if they are applicable to the new process definition, while only those package settings that are not applicable to the new process definition are reset. Package settings are applicable when the following three attributes are identical for both the old and new process definition:
  - package name
  - activity name
  - port name
- When the *ACL* value in the Documentum repository is set to **Type**, and no permission set is specified for Documentum object type `dm_note`, the module cannot process tasks when a package note is specified for packages. Instead, an error displays indicating a missing ACL in the object type `dm_note`. This occurs because object types require an assigned ACL when the **Inherit Permission Set From** option, in the Documentum repository, is set to **Type**. Therefore, when selecting DCTM Advanced Export step settings in a process or batch that defines a package note, with the **Inherit Permission Set From** option set to **Type** in the target Documentum repository, an ACL must be defined for Documentum object type `dm_note`. Otherwise, export will fail.
- It is possible to define a process definition without packages by using Documentum Composer. However, Documentum Advanced Export does not support such processes. Process definitions without packages will not appear in the **Definition** list in the **Process** tab of the module's **Setup** window.

#### To start a Documentum process:

1. Run Documentum Advanced Export for setup, and then click **Definitions**. The **Definition Settings** pane displays.
2. Click the **Document** icon representing the object to modify export content file settings for in the definition list to start a new Documentum process, and then select the **Process** tab.
3. Select **Start a new process with these settings** from the **Assign object to business process** list box.

4. Select a Documentum process definition from the **Definition** list box.
5. In the **Process name** field, type a name and/or **IA Value**. Click **Insert value** to display the **Choose Value** window, and then select an **IA Value** listed for the Documentum Advanced Export step name. .
6. In the **Select the package(s) want to assign the object to** area, select each package check box representing the activity to assign to this dm\_document object in the business model.
7. In the **Package notes** field, enter any package notes, or click **Insert value** to display the **Choose Value** window to select an **IA Value** listed for the Documentum Advanced Export step name. Selection of package notes is enabled from the index fields created by instantiating a Completion module step.
8. In the **Send to** area, select one of the following options:
  - **First recipient(s) only**
  - **All subsequent recipients**
9. Click **Apply**.

### **Related Topics**

*[“Editing the Definition List” on page 57](#)*

*[“Adding Object Definitions” on page 59](#)*

*[“Setting Object Permissions” on page 68](#)*

*[“Associating Attributes with an Object” on page 62](#)*

#### **3.4.2.12 Assigning Objects to an Inbox**

Use the **Inbox** tab to configure the object settings for an assigned or unassigned Documentum inbox. These settings include:

- Assigning objects to a specific inbox
- Assigning a priority to the object
- Specifying an optional event value
- Sending an email message to the owner of the inbox queue when an event occurs.

Each field on the **Inbox** tab has an associated **Insert Value** button for selecting and choosing an IA Value.

#### **To apply inbox settings:**

1. Run Documentum Advanced Export for setup, and then click **Definitions**. The **Definition Settings** pane displays.

2. Add or select a **Document** object. section provides For instructions on how to add objects, see [“Adding Object Definitions” on page 59](#).
3. Select the **Inbox** tab, and then select **Place object onto inbox queue** to enable the options.
4. From the **Queue owner** list, select a user to receive the specified object.
5. To specify an event to associate with the object when it is placed in the queue, enter **Event**. Other applications can use this event to process the object conditionally.
6. Type a task priority number in the **Priority** field. This priority number establishes the order in which objects are processed when they are imported to the inbox.
7. To notify the owner of the inbox queue when the specified event occurs, select **Send email to owner**, and then enter the message text.
8. Click **Apply**.

### Related Topics

[“Editing the Definition List” on page 57](#)

[“Adding Object Definitions” on page 59](#)

[“Setting Object Permissions” on page 68](#)

### 3.4.2.13 Managing Partitions

Add the **i\_partition** attribute to set partition properties for document objects being exported to a partitioned repository. Partitioning enables document storage management that preserves high volume resources so that documents that are less likely to be accessed can be managed differently. For example, a repository divided into two partitions could enable one partition to store recent documents occupying less storage space on high-speed, low-volume storage. The second partition could be used to store rarely accessed older documents on low-speed but high-volume storage.

#### To specify a partition ID:

1. Run Documentum Advanced Export for setup, and then click **Definitions**. The **Definition Settings** pane displays.
2. Create a **Document** type definition. For instructions, see [“Adding Object Definitions” on page 59](#).
3. Click the **Attribute** tab, and then select the **Populate Documentum system attributes** check box.
4. Click **New**, and then select **i\_partition** from the **Attribute** name list.

5. For the **i\_partition** attribute, type the values defined during repository partitioning.
6. For new objects being exported for the first time, add and then set the value of the `object_name` attribute. If updating an object that is already in the repository, skip this step. For more information, see [“Associating Attributes with an Object” on page 62](#).
7. Click **Apply**.

### Related Topics

[“Editing the Definition List” on page 57](#)

[“Adding Object Definitions” on page 59](#)

[“Associating Attributes with an Object” on page 62](#)

#### 3.4.2.14 Exporting to Multiple Documentum Repositories

Permission and configuration can be incompatible across multiple Documentum repositories. It is necessary to create an *IPP* with a separate step for each Documentum repository to export to.

##### To export to multiple Documentum repositories:

1. Create an IPP including one Documentum Advanced Export step for each Documentum repository.
2. Configure each Documentum Advanced Export step to export to the specific Documentum repository.
3. In production mode, trigger each step in the IPP.

### Related Topics

[“Understanding the Documentum Advanced Export\\* Module” on page 53](#)

[“Understanding the Documentum Repository” on page 55](#)

[“Connecting to a Documentum Repository” on page 56](#)

[“Adding Object Definitions” on page 59](#)

[“Associating Attributes with an Object” on page 62](#)

[“Running Documentum Advanced Export in Production” on page 83](#)

### 3.4.3 Understanding Error Handling

To make processing more efficient, specify how a module responds when an error occurs during production. Specific error handling functionality depends on whether the module is run as an attended or unattended process. Steps in an *IPP* that are run as services are considered unattended processes. Error handling options define what to do when an error occurs during production and how to recover from an error.

When defining error handling options for a step, consider how the step is defined in the IPP. If there is no error routine in the IPP, a task in error during production keeps being requeued. The task is submitted to the module once again for processing, it errors out, and the cycle is repeated in an infinite loop. Enable **Automatically abort entire task** and **Set batch error** to avoid this error retry cycle.



**Note:** Enabling the DFC trace mode is not recommended when running Documentum Advanced Export for production. If the DFC trace mode is enabled, it causes the fatal DFC error: `java.lang.OutOfMemoryError`.

If the DFC error occurs, the module cannot continue processing and must be restarted. An error message indicates that processing cannot continue and that a module restart is required.

#### 3.4.3.1 Setting Up Error Handling

This procedure applies to modules that have an **Errors** option on the navigation panel of the module setup window run as an application. If the module does not have an **Errors** option, or if the module is run as a service, then error handling must be defined in the *IPP*. The *Process Developer Guide* contains instructions for including an error handling routine in an IPP.

Some error conditions cease to exist when subsequent attempts are made to process a task. For example, a temporarily locked file causes an error initially. Then, the file is unlocked and the error resolves by the time the module attempts to process the task again.



#### Notes

- When a module is run as a service, error handling options defined during module setup are ignored. The module skips the node that produced the error. It continues receiving tasks, and does not set the batch priority to 0 unless the service is stopped or paused.
- The Documentum Advanced Export error settings in processes converted from Intelligent Capture 5.3 are set to **Automatically abort entire task**. For more information on using upgraded processes, see *OpenText Intelligent Capture - Administration Guide (ECPCORE-AON)*.

#### To specify error handling and recovery:

1. Run the module for setup.

2. Select **Error**.
3. Select an option in the **When an Error Occurs** section:
  - a. **Prompt for an action**: Displays a prompt to the operator when an error occurs and suspends processing until the operator responds to the error.
  - b. **Automatically abort entire task**: Aborts the current task and returns an appropriate *<ExportResult>* IA Value, which is evaluated by the instructions in the IPP **Finish** event handler. Automates error handling when the module is running as an unattended process. No operator prompts display during production. Select an available option:
    - **Stop receiving tasks after current task**: Equivalent to the operator choosing the Stop command. When not selected, and an error occurs, the module continues to accept tasks from the Intelligent Capture Server.
    - **Set the batch priority to 0**: Takes the batch offline and prevents further processing by any module until the administrator resets the batch priority. When this option is not selected and an error occurs, the batch priority remains unchanged in response to the *<ExportResult>* IA Value. It remains unchanged except as specified in the IPP **Error** or **Finish** event handlers.
    - **Set batch error**: Sets the batch to an error status and prevents further processing by the module until the administrator clears the error.
4. In the **Recovery Options** section, specify how the module recovers from errors during production:
  - Select the **Automatic retry** option and type or select a numeric value in the **Number of times to retry before reporting an error** field. The module retries the task the specified number of times before reporting an error. When this option and field are cleared, the module does not retry tasks that have errors.
  - Select the **Skip nodes that have already been successfully processed by this step** option to prevent the module from reprocessing nodes that have already been successfully processed. When this field is cleared, the module reprocesses all nodes in the task, even those nodes that have already been successfully processed.

### 3.4.4 Passing Non-Image Files Directly to Documentum

The Documentum Advanced Export module can export non-image files received from other modules. Include code in the *IPP* to pass the non-image files to the Documentum Advanced Export module. During module setup, select **Copy the file without modification** and then select the content type from the **Content** tab. Documentum Advanced Export module can be used to pass non-image files or data from another module directly to Documentum. In this case, the Documentum Advanced Export module does not open, read, write, or alter the file in any way. It simply passes the non-image file. Data is passed by the `<InputFile<n>>` IA Value.

During production, the Documentum Advanced Export module checks for input files at level 0 (the page level) first. If no input files exist at the page level, it next checks for input files at level 1. If no input files exist at level 1, it checks at level 2. It traverses the entire tree up to level 7 (the batch level).

Configure the content options during module setup to indicate the type of file or data being passed. Documentum system is notified the file type it is receiving. The system can properly open, view, and print the document being exported.

#### To pass non-image document files to Documentum

1. Run Documentum Advanced Export for setup, and then log on to the Documentum repository.
2. Click **Definitions**, and then click to expand the Documentum repository in the definition list.
3. Select the document to be exported as a non-image, and then verify that **Create a new object** is selected on the **Object** tab.
4. Select the **Content** tab.
5. From the **File Value** list box, select an **InputFile<n>** option.
6. Select **Copy the file without modification**.
7. Select the non-image content type from the **Documentum content type** list box.
8. (Optional) If the chosen content type can be indexed, select **Full text index** to enable full-text indexing.
9. Click **Apply**.

#### Related Topics

[“Connecting to a Documentum Repository” on page 56](#)

[“Adding Object Definitions” on page 59](#)

[“Exporting Document Objects to a Specified File Type” on page 65](#)

### 3.4.5 Retrieving Specific Documentum Processes

By default, Documentum Advanced Export retrieves all Documentum processes which can be extremely time consuming. If required, you can execute a query to retrieve a specific process.

**To retrieve specific Documentum processes:**

1. Open the `QuickModuleHost.exe.config` file from `Program Files\InputAccelerator\binnt` (or `Program Files (x86)` for 64-bit systems) using Notepad.
2. Add a `DocumentumGetProcessesDQL` key to the `appSettings` tags and set the value to `"select <query>"`, where `<query>` is your custom query for retrieving Documentum processes. For example: `<add key="DocumentumGetProcessesDQL" value="select * from dm_process" />`.



**Note:** The value must be set to a query with the select statement only, all other query types are not allowed.

3. Save the `QuickModuleHost.exe.config` file.

## 3.5 Running Documentum Advanced Export in Production

After the module has been set up, tested, and placed in a production environment, operators and administrators will run the module in production.

For information related to common production tasks for unattended modules, see *Running a Module for Production* in the *OpenText Intelligent Capture - Module Reference (ECPCORE-CMD)* guide.



### Notes

- The *Running Modules in Production Mode* section contains production topics that are common to many unattended modules and may not apply to this module.
- It is not recommended to enable the DFC trace mode when running Documentum Advanced Export for production. If the DFC trace mode is enabled, it can cause the fatal DFC error: `java.lang.OutOfMemoryError`. This issue on DFC is known.

If the DFC error occurs, the module cannot continue processing and must be restarted. The corresponding error occurs:

`"Cannot continue processing due to fatal DFC error: java.lang.OutOfMemoryError. Please restart the module to continue"`

### 3.5.1 Processing Rescan Requests from the Documentum Repository

Use the Web Services WS Input Rescan script to handle rescan requests from the Documentum repository, which requires the Web Services Input, RescanPlus, and Documentum Advanced Export modules in the process.

When the WS Input module receives a rescan request that was originally captured, processed, and exported by RescanPlus, it decodes the data into IA Values.

The RescanPlus module then transfers the IA Values and the document images to the Intelligent Capture Server. It also creates an Intelligent Capture Web Services rescan batch. This batch contains all of the images in the rejected document. An operator views the document in the RescanPlus module, and marks any image requiring a rescan.

Other Intelligent Capture modules, as specified in the rescan batch, process the rescanned document. Then, the Documentum Advanced Export module exports the rescanned document using settings that were included in the data returned to Intelligent Capture through the WS Input module.

Because module setup data is supplied with the export task, the Documentum Advanced Export module ignores all user-defined setup. If the user opens a rescan batch for setup, the module displays only the **Errors** tab, enabling access to error handling options. All other setup options are unavailable because they are automatically configured according to values received by the WS Input module in the rescan job. This automatic rescan mode configuration includes the Documentum repository to use. It also includes the **Process** name, **Package** name, **Activity** name, **Port** name, and other settings. All these settings enable the rescanned batch to match the characteristics of the batch that contained the original document.

### 3.5.2 Handling Messages and Errors

Depending on how error handling was set up for a module, informational and error messages can display from time to time as tasks are processed. If a module is installed as a service, it overrides the **When an Error Occurs** option. It always is in **Automatically Respond** and it does not stop receiving tasks unless the service is stopped or paused. Some of the types of messages and errors that display can include:

#### Connect messages

If the **Prompt for an action** option was set up, the **Connect** window displays in two cases:

- When the module receives a task that requires the user to connect to an Intelligent Capture Server or repository.
- When the connection to an Intelligent Capture Server is lost. To continue processing tasks, select a server name, user ID, and password, and click **Connect**.

The options displayed differ slightly depending on the module displaying the message.

### **Production errors**

There are many different events that can trigger production errors. For example, when the server or workstation disk becomes full while processing a task. When this error or any other error occurs, processing is suspended and a **Production Error** window displays.

All production errors state the error message and error code as well as other relevant information about the batch, step, and task. A set of choices is then displayed to the operator. The options displayed differ slightly depending on the module displaying the message.

## **3.6 Reference—Documentum Advanced Export**

The topics within this section contain reference information useful while using the application in setup or production.

### **3.6.1 Programming Reference**

This section contains reference information about the available scripting interfaces and sample scripts in this application. If namespace information and sample scripts are not included in this Guide, the scripting library for the module has not been installed.

Scripting interfaces are provided as .NET libraries. Scripts are written using standard .NET programming languages such as VB. NET (Visual Basic) and C#. Find scripting samples in the Intelligent Capture program files folder, located by default at <<drive>>:\Program Files (x86)\InputAccel\Client\src\Sample Capture System\ScriptSource\Client-side Scripts\.

For more information about scripting, see the *Client Scripting Guide*.

### **3.6.2 IA Values**

The topics in this section describe IA values that can be used with this application.

### 3.6.2.1 Input IA Values

Input IA Values include file and processing variables.

**Table 3-4: Input IA Values**

IA Value	Description
<p>&lt;InputImage&gt; (File, Input, Trigger, Level&lt;n&gt;)</p>	<p>File name of the task input image on the Intelligent Capture Server. The file that corresponds with &lt;InputImage&gt; is a binary <i>TIFF</i> file. This is the only trigger variable, which means that after it is set to a non-zero value, the Intelligent Capture Server sends the task to a machine running the Documentum Advanced Export module.</p>
<p>&lt;InputFile&lt;n&gt;&gt; (File, Input)</p>	<p>This value must be set if the <b>Copy the file without modification (source can be any type)</b> option is selected on the <b>Content</b> tab. For more information, see <a href="#">“Managing Multiple Versions of the Same Document” on page 69</a>. This variable outputs the input file at level &lt;n&gt;, where &lt;n&gt; is the level at which to export the document, from 0 through 7.</p>
<p>&lt;RescanDeclined&gt; (Integer, Input)</p>	<p>This variable is used internally to determine whether or not a RescanPlus task was rescanned. When RescanPlus processes a task, it assigns either a 0 or 1 to this variable. When the task is finished, the Intelligent Capture Server evaluates this variable and then routes pages according to the <i>IPP</i> instructions.</p> <ul style="list-style-type: none"> <li>• 0 = false; rescanning was not declined because there is a new image. Route the image to ScanPlus to display the new image, and then route it to the next module for processing.</li> <li>• 1 = true; rescanning was declined There is no new image, which means that the RescanPlus operator either skipped the task by selecting <b>Go To Next Task</b> or that the task (a page) was not deleted because the &lt;NeedsRescan&gt; IA Value is 2. Route the RescanPlus input image to the next module for processing. Within an IPP, &lt;RescanDeclined&gt; means if the RescanDeclined variable is true. It is not necessary to set the value to 1 or 0.</li> </ul>

The following workflow variables are not included in `iaexdm.mdf`. To add documents to different packages within the same workflow, declare the variables in the IPP. Only declare the necessary variables to prevent errors. When configuring workflow settings from the module setup window, it is unnecessary to declare these variables or include them in the IPP.




Assigning these variables in an IPP overwrites selections in the module setup window.



In each of the following variables, `LevelL` represents the position in the `Object` list of the object being added to the workflow. For more information, see [“Associating Attributes with an Object” on page 62](#).

Each of the following variables are page level variables.

**Table 3-5: Workflow Variables**

Variable	Description
<code>&lt;LevelL_WFAction&gt;</code> (Long, Input)	This variable is set to 1 if <b>Apply object to new workflow</b> on the <b>Workflow</b> tab during module setup. If you clear this option, the variable is set to 0.  You can also set this variable equal to 1 or 2 in your IPP to create a workflow. If you are adding documents to a workflow created by another node in this batch, you must set this variable equal to 3 in your IPP.
<code>&lt;LevelL_WFProcess&gt;</code> (String, Input)	Contains the name of the process selected from the <b>Process Definition list on the Workflow</b> tab during module setup or the name you assign to this IA Value in your IPP.
<code>&lt;LevelL_WFName&gt;</code> (String, Input)	Contains the name of the new workflow you either typed in the <b>Workflow</b> name field on the <b>Workflow</b> tab during module setup or the name you assign to this IA Value in your IPP.
<code>&lt;LevelL_WFCreateNode&gt;</code> (Long, Input)	This variable is only applicable if you are adding objects to an existing workflow, by setting <code>&lt;LevelL_WFAction&gt;</code> equal to 3 in your IPP. You must assign this variable to the Node ID of the page node which created the workflow.
<code>&lt;LevelL_WFCreateInstance&gt;</code> (String, Input)	This variable is only applicable if you are adding objects to an existing workflow, by setting <code>&lt;LevelL_WFAction&gt;</code> equal to 3 in your IPP. You must assign this variable to the instance name of the instance which created the workflow.

Variable	Description
<LevelL_WFPackages> (Long, Input)	<p>Contains the number of packages you selected to attach the object to in the <b>Workflow</b> tab during module setup or that you assigned to this IA Value in your IPP.</p>
<LevelL_WFPackage<n>_Name> (String, Input)	<p>Contains the name of the nth package in the specified process definition, where n is determined by the number of packages contained in &lt;LevelL_WFPackages&gt;. The value of this variable is determined by your selections in the <b>Package</b> list of the <b>Workflow</b> tab or by your assignment of the variable in your IPP.</p> <p> <b>Note:</b> Packages are numbered starting with 0; for example, three packages are numbered consecutively as 0, 1, and 2.</p>
<LevelL_WFPackage<n>_Port> (String, Input)	<p>Contains the name of the port of the nth package in the specified process definition, where n is determined by the number of packages contained in &lt;LevelL_WFPackages&gt;. The value of this variable is determined by your selections in the <b>Port</b> list of the <b>Workflow</b> tab or by your assignment of the variable in your IPP.</p> <p> <b>Note:</b> Packages are numbered starting with 0; for example, three packages are numbered consecutively as 0, 1, and 2.</p>
<LevelL_WFPackage<n>_Activity> (String, Input)	<p>Contains the name of the activity of the nth package in the specified process definition, where n is determined by the number of packages contained in &lt;LevelL_WFPackages&gt;. The value of this variable is determined by your selections in the <b>Activity</b> list of the <b>Workflow</b> tab or by your assignment of the variable in your IPP.</p> <p> <b>Note:</b> Packages are numbered starting with 0; for example, three packages are numbered consecutively as 0, 1, and 2.</p>

Variable	Description
<LevelL_WFPackage<n>_Note> (String, Input)	<p>Contains the note of the nth package in the specified process definition, where n is determined by the number of packages contained in &lt;LevelL_WFPackages&gt;. The value of this variable is determined by your entry in the <b>Notes for Package</b> field of the <b>Workflow</b> tab or by your assignment of the variable in your IPP.</p> <p> <b>Note:</b> Packages are numbered starting with 0; for example, three packages are numbered consecutively as 0, 1, and 2.</p>
<LevelL_WFPackage<n>_SendTo> (Long, Input)	<p>Contains 0 if you selected First recipient(s) only or 1 if you selected All subsequent recipients from the <b>Send to</b> list in the <b>Workflow</b> tab, for the nth package, where n is determined by the number of packages contained in &lt;LevelL_WFPackages&gt;. If you are adding objects to an existing workflow, you must assign this variable in your IPP to either 0 or 1.</p> <p> <b>Note:</b> Packages are numbered starting with 0; for example, three packages are numbered consecutively as 0, 1, and 2.</p>

The following document lifecycle variables are not included in `iaexdm.mdf`. You can configure all document lifecycle settings from the module setup window. If you want to use these variables in an IPP, declare each one in your IPP, using the following format:

```
<Module IAEXDM>
```

```
<LevelL_LifecycleAction> as long, Input
```

```
<LevelL_LifecycleName> as String, Input
```

```
<LevelL_LifecycleState> as String, Input
```

```
<LevelL_LifecycleAliasSet> as String, Input
```

```
<End module>
```

In each of these variables, `LevelL` represents the position in the `Object` list of the object you are adding to the workflow. For more information, see [“Setting Up Exporting” on page 57](#).

Each of the following variables are page level variables.

**Table 3-6: Document Lifecycle Variables**

Variable	Description
<LevelL_LifecycleAction> (Long, Input)	Contains 1 if you selected <b>Apply document lifecycle to object</b> on the <b>Document Lifecycle</b> tab. Contains 0 if you did not select this option.
<LevelL_LifecycleName> (String, Input)	Contains the name of the document lifecycle to apply to the object, as selected from the <b>Document lifecycle to apply</b> list on the <b>Document Lifecycle</b> tab.
<LevelL_LifecycleState> (String, Input)	Contains the name of the state in the document lifecycle to apply to the object, as selected from the <b>State</b> list on the <b>Document Lifecycle</b> tab.
<LevelL_LifecycleAliasSet> (String, Input)	Contains the name of the alias set to apply to the object, as selected from the <b>State</b> list on the <b>Document Lifecycle</b> tab.

### 3.6.2.2 Output IA Values

**Table 3-7: Output IA Values**

IA Value	Description
<Level<n>_WFOutputID> (String, Output)	Process ID of the Documentum process object in the Documentum repository to which this page node was added. Level<n> represents the position in the <b>Object</b> field of the object added to the process.
<Level0_InboxObject> (String, Output)	Object ID of the inbox object created if the Place object onto inbox queue option is checked under the <b>Inbox</b> tab. Level0 indicates that this IA Value is only available for page level nodes.
<Level0_ObjectId> (String, Output)	Object ID of the Documentum dm_ document object in the Documentum repository where this page node was exported. Level0 indicates that this IA Value is only available for page level nodes.
<Level0_Error> (String, Output)	If everything was exported successfully then this value is either an empty string or unassigned for every node in the batch tree. If any of the nodes had an error while exporting, then this value contains an error message explaining the problem. Level0 indicates that this IA Value is only available for page level nodes.

## Chapter 4

# Documentum ApplicationXtender Export

This section includes the Intelligent Capture specialized enterprise export module: **ecpcore-cxa**.

For information about common features and functionalities in the Intelligent Capture client modules, see *OpenText Intelligent Capture - Module Reference (ECPCORE-CMD)*.

## 4.1 Features

Documentum ApplicationXtender Export exports and stores any type of document to a supported ApplicationXtender document management system. ApplicationXtender Export is used to export files to any location accessible to the workstation on which the module is running. The module can be set up so that it does not alter the exported file.

ApplicationXtender Export features:

- **Provides WorkflowXtender support:** Can be configured to run ApplicationXtender Export workflows upon export.
- **Enables Full Text Indexing:** The module can route a document to ApplicationXtender Export Full Text Indexing.
- **Maps IA Values to index fields:** Enables mapping of IA Values to the index fields (including multi-valued fields) of a selected document class.
- **Enables specific output locations:** Specify an export location using a combination of hard-coded characters and IA Values. ApplicationXtender Export automatically creates any part of a required path that does not exist.
- **Supports item definitions:** Provides the ability to create item definitions and select an item definition for each document using a single IA value.
- **Provides error handling:** When ApplicationXtender Export encounters an error, the module sets the *<ExportResult>* IA Value to the appropriate error code. If configured appropriately, it also logs an error message to the Intelligent Capture Server Event log.

## 4.2 Setting Up Documentum ApplicationXtender Export

Most configuration information for Intelligent Capture client modules is defined during *module setup*. You can run a module in setup mode from Intelligent Capture Designer, from Intelligent Capture Administrator, or from a command prompt with appropriate arguments. For more information, see *Ways to Run a Module in Setup Mode* in the *OpenText Intelligent Capture - Module Reference (ECPCORE-CMD)* guide.

When launched in setup mode, a client module displays the **Setup** window in which you can specify the module's configuration settings.

### 4.2.1 Connecting to the Documentum Repository

Establish a connection to the Documentum Repository Server before completing setup tasks or using the module in production.

**To establish a connection to the repository server:**

1. Run Documentum ApplicationXtender Export for setup. The **Documentum AX Export (setup) window** displays.
2. Select the **Login tab**.
3. Connect to the repository server using the credentials that tasks from this module step use to connect during production mode:
  - **Data Source:** ApplicationXtender Export data source name (optional)
  - **User Name:** ApplicationXtender Export user name (required)
  - **Password:** ApplicationXtender Export user password (required)
4. Click **Connect** to initiate the repository session.

### 4.2.2 Setting Up Definition Properties

Use the **Export tab** in the **Documentum AX Export (setup) window** to specify how the module processes tasks and what information the module exports to the repository system. To configure this module you must first:

- Create a minimum of one Definition.
- Specify which Definition to use when exporting.
- Specify when a new document is created.

The **Definition Properties window** is displayed when the **New** or **Edit** button is clicked from the **Export** tab.

- When the **New** button is clicked, the **Definition Properties** window is populated with default values.


- Alternatively, select an existing definition from the **Definition Set** and click **Edit** to populate the **Definition Properties** window with values assigned to the selected definition.

#### 4.2.2.1 Specifying General Definition Properties

Before exporting content to the repository system, create at least one definition. The definitions provide the exporter with specific information about how files are exported, where they are exported, what naming conventions are used, and other critical information. All existing definitions are listed in the **Definition Set** field on the **Export tab** of the **Documentum AX Export (setup) window**.

##### To create, edit or delete a document definition:

1. Run ApplicationXtender Export for setup. The **Documentum AX Export** window displays.
2. Select the **Export** tab.
3. In the **Definition Set** area:
  1. Click the **New** button to create a definition. The **Definition Properties** window displays.
  2. Select an existing definition and click the **Edit** button to edit the selected definition. The **Definition Properties** window displays.
  3. Select an existing definition and click the **Delete** button to remove the selected definition from the list. A confirmation prompt displays before the set is deleted.
4. Type the name of the definition in the **Definition Name** field.
5. Type or select the ApplicationXtender Application profile name that serves as the export target. Existing profiles can be selected from the **Profile name** list box.
6. Optionally, select the **Skip First Page of Each Document** checkbox. This check box instructs the module to skip the first page of the document at export time. If the document consists of a single page, nothing is exported. Use **Skip First Page of Each Document** for pages, such as fax cover sheets, where there is possibly index data on the cover sheet, that does not require exporting to the repository. Selecting this option skips the export of the first page of a document regardless of the page type.
 

 **Note:** Use **Discard Separator Sheet**, available in the configuration wizard, to recognize and eliminate blank pages, barcodes, patchcodes or other pages that are commonly used to trigger job separation.
7. Click **OK** to save these settings, close the **Definition Properties** window, and return to the **Documentum AX Export** window to proceed with other setup tasks.



**Note:** To set up the exporter, [Connecting to the Documentum Repository](#) and provide the required information on each of the setup tabs.

## Related Topics

[“Connecting to the Documentum Repository”](#) on page 92

[“Mapping IA Values to Index Fields”](#) on page 94

[“Setting Up Files for Exporting to the Database”](#) on page 95

[“Handling Duplicate Index Values”](#) on page 97

[“Routing a Document to Full Text Indexing”](#) on page 98

[“Logging in to a Workflow Server”](#) on page 99

[“Setting Up Exporting”](#) on page 100

### 4.2.2.2 Mapping IA Values to Index Fields

ApplicationXtender Export enables mapping between ApplicationXtender Export index fields and IA Values. Multiple IA Values can be mapped to a single ApplicationXtender Export field. Valid field names are obtained from the application profile defined on the [General tab](#) of the [Definition Properties window](#), and can be selected from a list box. The module makes the best match between the IA Value data type and the corresponding ApplicationXtender Export native data type during the export process. If a suitable type is not found, the String type is used.

#### To map an IA Value to an ApplicationXtender Export index field:

1. Run ApplicationXtender Export for setup. The [Documentum AX Export \(setup\) window](#) displays.
2. Select the [Export tab](#).
3. In the **Definition Set** area:
  1. Click the **New** button to create a definition. The **Definition Properties** window displays.
  2. Select an existing definition and click the **Edit** button to edit the selected definition. The **Definition Properties** window displays.
4. Select the [Index tab](#).
5. The **Index fields** list displays a list of valid index fields along with their corresponding ApplicationXtender Export names. Select the index field to map from the **Index fields** list.

6. Type the *IA* Value in the text field, or click **Insert Values** to display the **Choose Value** window to associate *IA* Values with ApplicationXtender Export index fields.
7. Select the *IA* Values to map to the ApplicationXtender Export field. You can select more than one *IA* Value to map. When all *IA* Values have been selected, click **OK** to close the **Choose Value** window.
8. Click **OK** to save these settings, close the **Definition Properties** window, and return to the **Documentum AX Export** window to proceed with other setup tasks.



**Note:** All fields marked as required by ApplicationXtender Export must have an associated *IA* Value. ApplicationXtender Export does not allow the configuration to complete until all required fields are populated.

### Related Topics

[“Connecting to the Documentum Repository” on page 92](#)

[“Specifying General Definition Properties” on page 93](#)

[“Setting Up Files for Exporting to the Database” on page 95](#)

[“Handling Duplicate Index Values” on page 97](#)

[“Routing a Document to Full Text Indexing” on page 98](#)

[“Logging in to a Workflow Server” on page 99](#)

[“Setting Up Exporting” on page 100](#)

#### 4.2.2.3 Setting Up Files for Exporting to the Database

ApplicationXtender Export enables export of documents in various file types. File handling is defined on the **File** tab of the **Definitions Properties window**, accessible from the **Export** tab of the **Documentum AX Export (setup)** window. The module handles both Native and Foreign file types. Native file types are viewed using the ApplicationXtender Export native viewer, whereas the module calls the default viewing application for viewing foreign file types.

##### To set up files for export to the database:

1. Run ApplicationXtender Export for setup. The **Documentum AX Export (setup) window** displays.
2. Select the **Export** tab.
3. In the **Definition Set** area:
  1. Click the **New** button to create a definition. The **Definition Properties** window displays.

2. Select an existing definition and click the **Edit** button to edit the selected definition. The **Definition Properties** window displays.
4. Select the **File** tab.
5. From the **Export type** list box, select either **Native** or **Foreign**.
  - If exporting a native file type, select **Native**. Native file types include:
    - *TIFFG4*
    - *TIFFLZW*
    - *BMP*
    - *JPEG*
    - *JBIG*
    - *GIF*
    - *TEXT*
    - *RTF*
    - *PDF*
    - *HTML*
  - If exporting a non-native file type, select **Foreign**. Then enter the appropriate file type extension in the **Extension** text box. Enter the file extension without the leading “.” character. For example, if you are exporting GIF files, type “gif” in the text field. Providing the file extension enables the module to call the appropriate program for viewing the file.
6. If using an *IA* Value or index field (mapped to an *IA* Value) to populate the **Extension** field, click the **Browse** button to display the **Choose Value** window.
7. Select the appropriate value from the **File Value** list box.
8. To copy without modifying the source file before export, select the **Copy the file without modification** checkbox.
9. To save an image file with selected settings, select the **Save the file with these settings** checkbox and select from the following options:
  - **File Type**: select the file type from the list box.
  - **Color Format**: select the color format from the list box.
  - **Compression**: select the compression type from the list box.
  - **Merge Annotations**: Select this check box to merge any annotations with the image before export.
10. Click **OK** to save these settings, close the **Definition Properties** window, and return to the **Documentum AX Export** window to proceed with other setup tasks.

## Related Topics

[“Connecting to the Documentum Repository” on page 92](#)

[“Specifying General Definition Properties” on page 93](#)

[“Setting Up Exporting” on page 100](#)

### 4.2.2.4 Handling Duplicate Index Values

Duplicate index entries are created when a document with the same index values exists on the repository server. ApplicationXtender Export offers file handling options that inform the server what to do with duplicate index values. Choices are defined on the **Index Options** tab of the **Definitions Properties window**, accessible from the **Export tab** of the **Documentum AX Export (setup) window**.

#### To set up handling for duplicate index values:

1. Run ApplicationXtender Export for setup. The **Documentum AX Export** window displays.
2. Select the **Export** tab.
3. In the **Definition Set** area:
  1. Click the **New** button to create a definition. The **Definition Properties** window displays.
  2. Select an existing definition and click the **Edit** button to edit the selected definition. The **Definition Properties** window displays.
4. Select the **Index Options** tab.
5. In the **Duplicate Index Action** list box, select from the following:
  - **Do Nothing**: Does not modify the repository. If there is a document with the same index data, that document is not modified. Index fields are not changed and pages are not added.
  - **Error**: Aborts the export and reports an error.
  - **Merge**: Adds the files to the first document matching all the index values. The files are appended as the last pages of the document.
  - **New**: Continues with the creation of a new document. The original document remains, and a new document is created with all the same index data. The result is multiple documents with the same index data.
  - **Replace**: Replaces all pages in the first document matching all the index values. **Replace** deletes the original document and replaces it with the new document and same index data.
6. To proceed with other setup tasks:
  1. Click **OK** to save these settings.

2. Close the **Definition Properties** window.
3. Return to the **Documentum AX Export** window.



**Note:** Setting a Key Reference field enables the lookup of Data Reference fields. Data Reference fields are automatically populated and modification of a Data Reference field changes that field for all documents which match the Key Reference field. The *Administration Guide* contains help for working with Key and Reference Data fields.

## Related Topics

[“Setting Up Exporting” on page 100](#)

[“Specifying General Definition Properties” on page 93](#)

[“Mapping IA Values to Index Fields” on page 94](#)

[“Setting Up Files for Exporting to the Database” on page 95](#)

[“Routing a Document to Full Text Indexing” on page 98](#)

[“Logging in to a Workflow Server” on page 99](#)

### 4.2.2.5 Routing a Document to Full Text Indexing

ApplicationXtender Export offers automatic routing of documents to ApplicationXtender Export Full Text Indexing. Full text queues are text indexes of a document, consisting of *OCR* data against which queries are made. A full text query can be used to verify that a job was processed. Processing queues are queried internally from ApplicationXtender Export, so an ApplicationXtender Export Index Server must be available for Full Text Indexing to function.

Full text indexing choices are defined on the **Full Text** tab of the **Definitions Properties** window, accessible from the **Export** tab of the **Documentum AX Export (setup)** window.

#### To set up handling for duplicate index values:

1. Run ApplicationXtender Export for setup. The **Documentum AX Export** window displays.
2. Select the **Export** tab.
3. In the **Definition set** area:
  1. Click the **New** button to create a definition. The **Definition Properties** window displays.
  2. Select an existing definition and click the **Edit** button to edit the selected definition. The **Definition Properties** window displays.
4. Select the **Full Text** tab.

5. The module does not automatically send documents for full text indexing. **Do not submit to Index Server** is selected by default. To enable Full Text Indexing, select **Submit to Index Server**. This option sends the job into the full text queue.
6. Select the processing queue for your job from the **Processing Queue** list box.
7. Click **OK** to save these settings, close the **Definition Properties** window, and return to the **Documentum AX Export** window to proceed with other setup tasks.



**Note:** You can also use ApplicationXtender Export Index Server Monitor to verify a job. The **Log** tab of the Monitor displays the OCR and Index jobs with the timestamp, application ID, and document ID.

## Related Topics

[“Setting Up Exporting” on page 100](#)

[“Specifying General Definition Properties” on page 93](#)

[“Mapping IA Values to Index Fields” on page 94](#)

[“Setting Up Files for Exporting to the Database” on page 95](#)

[“Handling Duplicate Index Values” on page 97](#)

[“Logging in to a Workflow Server” on page 99](#)

### 4.2.2.6 Logging in to a Workflow Server

ApplicationXtender Export enables you to log in to a specific WorkflowXtender Server, based on the information entered. When the export starts, this information is used to log in to the appropriate Workflow Server and trigger a workflow.

Workflow choices are defined on the **Workflow Login** tab of the **Definitions Properties** window, accessible from the **Export** tab of the **Documentum AX Export (setup)** window.

#### To log in to a specified workflow:

1. Run ApplicationXtender Export for setup. The **Documentum AX Export** window displays.
2. Select the **Export** tab.
3. In the **Definition Set** area:
  1. Click the **New** button to create a definition. The **Definition Properties** window displays.
  2. Select an existing definition and click the **Edit** button to edit the selected definition. The **Definition Properties** window displays.

4. Select the **Workflow Login** tab.
5. By default, **Do not connect to Workflow Server** is selected. To enable workflow connections, select **Connect to Workflow Server** and enter the following required information:
  - **Workflow Server name:** Enter the name of the server to use (required).
  - **Workflow Database name:** Enter the name of the database to use server (required).
  - **Use the ApplicationXtender login:** Enable this checkbox to use the ApplicationXtender Export login as the WorkflowXtender login.
  - **User Name and Password:** Type the user name and password to use as the WorkflowXtender login. This option is available only if the **Use the ApplicationXtender login** checkbox is not selected.
6. Click **OK** to save these settings, close the **Definition Properties** window, and return to the **Documentum AX Export** window to proceed with other setup tasks.

## Related Topics

[“Setting Up Exporting” on page 100](#)

[“Specifying General Definition Properties” on page 93](#)

[“Mapping IA Values to Index Fields” on page 94](#)

[“Setting Up Files for Exporting to the Database” on page 95](#)

[“Handling Duplicate Index Values” on page 97](#)

[“Routing a Document to Full Text Indexing” on page 98](#)

### 4.2.3 Setting Up Exporting

From the **Export** tab of the **Documentum AX Export (setup) window**, administrators can create, edit and delete document definitions, assign a definition to use at export, and establish criteria for splitting documents. Page nodes are evaluated in order. A new document is created each time the **Create When** or the **Use Definition** values change as a result of the IA Values inserted.

#### To set up exporting:

1. Run ApplicationXtender Export for setup. The **Documentum AX Export** window displays.
2. Select the **Export** tab.
3. In the **Definition Set** field, select the appropriate button:

- **New:** Creates a definition and displays the **Definition Properties** window for configuring the definition. For information on working with definitions, see [“Specifying General Definition Properties” on page 93](#).
  - **Edit:** Displays the **Definition Properties** window to edit the setup of the selected definition. This button is unavailable if no definitions are selected.
  - **Delete:** Deletes the currently selected definition. This button is unavailable if no definitions are selected or defined.
4. In the **Definition to Export** field, type a value or select the **Browse** button to display the **Choose Value** window. Select an IA value that determines the document definition that the module uses during export. This value remains static when the exporter is used with the Wizard.
  5. In the **Create a new document when this value changes** field, type a value or select the **Browse** button to select an IA value that determines when a new document is created.
  6. Click **OK** to save the configuration settings and close the **Documentum AX Export** window.



**Note:** Do not leave date fields blank as it will result in failure to export to ApplicationXtender.

### Related Topics

[“Connecting to the Documentum Repository” on page 92](#)

## 4.3 Running Documentum ApplicationXtender Export in Production

After the module has been set up, tested, and placed in a production environment, operators and administrators will run the module in production.

For information related to common production tasks for unattended modules, see *Running Modules in Production Mode* in the *OpenText Intelligent Capture - Module Reference (ECPCORE-CMD)* guide.



**Note:** The *Running Modules in Production Mode* section contains production topics that are common to many unattended modules and may not apply to this module.

## 4.3.1 Working with Repository Sessions

Each task the module receives identifies a repository session. The data of that task is exported to the specified repository session. Each task contains a user ID and password to enable an automatic connection and unattended export to the repository server specified in the task. Optionally, you can also log in to one or more repository sessions when you start the module in production mode.

There are two types of connections:

- Task-based connections are not necessarily persistent. The task can direct the module to disconnect when the connection is no longer needed. Connecting and disconnecting from sessions takes time. However, this feature is useful when security is a concern or when operating with a limited number of repository system licenses.
- Module-based connections are persistent. The module remains connected to each session until the module exits. Connecting and then remaining connected results in faster task processing. However, it can result in security compromises or more simultaneous connections, which require more repository system licenses.

Unless you specify *-autostart* on the command line when starting the module, after you start the module the session **Connect** window displays. The lower portion of the window displays the sessions that are established and active.

### 4.3.1.1 Selecting a Repository Connection

Establish repository connections from the **Documentum AX Export Login** window. If a connection exists, processing can proceed without additional connections.

**To select an existing repository connection for processing:**

1. Run the ApplicationXtender Export module. The **Documentum AX Export Login** window displays. The server name, user name, password, and domain of the current connection are listed in the designated fields.
2. Click **OK** to accept the current connection. The production window displays.
3. Process tasks.



**Note:** You are not required to specify a repository session connection during module startup. However, if you do not establish connections during login, and the module receives tasks, you are prompted to connect at that time. If credentials are not provided, an appropriate error is logged, depending on how the error handling for the module is configured.

### Related Topics

[“Connecting to the Documentum Repository” on page 92](#)

[“Connecting to Repository Sessions” on page 103](#)

[“Disconnecting from Repository Sessions” on page 103](#)

### 4.3.1.2 Connecting to Repository Sessions

Establish repository connections from the **Documentum AX Export Login** window.

#### To connect to one or more repository sessions:

1. From the **Data Source** list, select the repository server.



**Note:** If a server name was specified in the current task, the **Data Source** list displays that server. You cannot change a server name that the task specifies.

2. In the **User Name** field, type a valid user ID.
3. In the **Password** field, type a valid password.
4. Click **Connect**. If the connection is successful, the corresponding **Data Source** and **User Name** information is added to the list of sessions.
5. Repeat steps 1-4 to connect to additional repositories sessions.
6. Click **OK** to accept your connections and close the window. The production window displays.
7. Process tasks.

### 4.3.1.3 Disconnecting from Repository Sessions

Manage repository connections from the **Documentum AX Export Login** window.

#### To disconnect from one or more repository sessions:

1. In the list of sessions in the lower portion of the window, select the session from which you want to disconnect.
2. Click **Disconnect**.
3. Repeat steps 1 and 2 to disconnect from other sessions.
4. Click **OK** to close the window. The production window displays.
5. Process tasks.

#### Related Topics

[“Connecting to the Documentum Repository” on page 92](#)

[“Selecting a Repository Connection” on page 102](#)

[“Connecting to Repository Sessions” on page 103](#)

## 4.4 Reference—Documentum ApplicationXtender Export

The topics within this section contain reference information useful while using the application in setup or production.

### 4.4.1 Windows

The topics within this section provide descriptions of windows accessible from the application. The topics list the user interface element name and include a brief description of actions available from the window.

#### 4.4.1.1 Definition Properties

Access the **Definition Properties** window from the **Documentum AX Export** window **Export** tab. Click the **New** button to display the **Definition Properties** window. The window also displays if you select an existing definition set from the **Definition Set** list and click **Edit**. Settings in the **Definition Properties** window include:

**Table 4-1: Definition Properties Window**

Element	Description
Definition name	Type a name for your item definition.
Object type	Select the item type.
Set/modify description	Select the <b>Set/modify description</b> checkbox and type a comment in the text box to include a description for the item that is exported. You can also select <i>IA Value</i> to select an IA Value to use in describing the item to be exported. Clear the <b>Set/modify description</b> checkbox if you do not want to specify a description for the item.
Folder item types only	Select the <b>Generate error if item exists</b> checkbox when you want the module to generate an error if the item already exists. The module will use the error handling settings specified in the <b>Errors tab</b> .
Workflow item types only	Select <b>Browse</b> . The <b>Select Workflow Map</b> window displays. Choose a workflow to export to and select <b>OK</b> . The name of the workflow you selected displays in the corresponding field.
General tab	Displays the settings on the <b>General tab</b> for assigning basic settings and properties to the definition object.

Element	Description
Index tab	Displays the settings on the <b>Index tab</b> for creating index mapping between ApplicationXtender Export index fields and IA Values.
File tab	Displays the settings on the <b>File tab</b> for specifying file type and compression settings to be used at export.
Index Options tab	Displays the settings on the <b>Index Options tab</b> for establishing rules for handling duplicate index entries.
Full Text tab	Displays the settings on the <b>Full Text tab</b> for routing a document through ApplicationXtender Export Full Text Indexing.
Workflow Login tab	Displays the settings on the <b>Workflow Login tab</b> to log in to a specific WorkflowXtender Server and trigger a workflow.
OK	Click <b>OK</b> to save the configuration settings and close the <b>Documentum AX Export</b> window.
Cancel	Click <b>Cancel</b> to close the <b>Documentum AX Export</b> window without saving any setting changes.

#### 4.4.1.1.1 General tab

Access the **Definition Properties** window from the **Documentum AX Export** window **Export** tab. Click the **New** button to display the **Definition Properties** window. The window also displays if you select an existing definition set from the **Definition Set** list and click **Edit**. Settings on the **General** tab include:

**Table 4-2: General tab**

Element	Description
Definition name	Type or edit the definition name.
ApplicationXtender Application	Select the ApplicationXtender Export application profile name that is the target of the export from the list box.

Element	Description
<p><b>Skip First Page of Each Document</b></p>	<p>Select the <b>Skip First Page of Each Document</b> checkbox to skip the first page of a document at export time. If the document consists of a single page, nothing will be exported when checkbox is selected.</p> <ul style="list-style-type: none"> <li>• <b>Skip First Page of Each Document</b> should be used for pages, such as fax cover sheets, where there may be index data on the cover sheet that should not be exported to the repository. Selecting this option will skip the export of the first page of a document regardless of the page type.</li> <li>• Use <b>Discard Separator Sheet</b>, available in the configuration wizard, to recognize and eliminate blank pages, barcodes, patchcodes or other pages that are commonly used to trigger job separation.</li> </ul>

**4.4.1.1.2 Index tab**

Access the **Definition Properties** window from the **Documentum AX Export** window **Export** tab. Click the **New** button to display the **Definition Properties** window. The window also displays if you select an existing definition set from the **Definition Set** list and click **Edit**. Settings on the **Index** tab include:

**Table 4-3: Index tab**

Element	Description
<b>Index fields list</b>	<p>Consists of a list of index fields along with their corresponding ApplicationXtender Export names.</p> <p>An edit box along with an <b>Insert Values</b> button is used to associate <i>IA</i> values with ApplicationXtender Export index fields. This is intended to map IA Values as attributes inside of ApplicationXtender Export.</p> <p>Multiple IA Values may be mapped into one ApplicationXtender Export field. The ApplicationXtender Export names can be selected from a list box, since a valid list of field names will be obtained from the application profile defined in the <b>General tab</b>.</p> <p>The module will make the best match between the IA Value data type and the corresponding ApplicationXtender Export native data type during the export process. If a suitable type is not found then the String type will be used.</p>



**Note:** All fields marked as required by ApplicationXtender Export must have an IA Value associated with them. ApplicationXtender Export does not allow the configuration to complete until all the required ApplicationXtender Export fields are populated.

### Related Topics

[“Setting Up Exporting” on page 100](#)

[“Specifying General Definition Properties” on page 93](#)

[“Setting Up Files for Exporting to the Database” on page 95](#)

[“Handling Duplicate Index Values” on page 97](#)


[“Routing a Document to Full Text Indexing” on page 98](#)

[“Logging in to a Workflow Server” on page 99](#)

#### 4.4.1.1.3 File tab

Access the **Definition Properties** window from the **Documentum AX Export** window **Export** tab. Click the **New** button to display the **Definition Properties** window. The window also displays if you select an existing definition set from the **Definition Set** list and click **Edit**. Settings on the **File** tab include:

**Table 4-4: File tab**

Element	Description
Export Type	<p>From the <b>Export Type</b> list box, select <b>Native</b> or <b>Foreign</b>.</p> <ul style="list-style-type: none"> <li>• <b>Foreign files:</b> are not viewable by the ApplicationXtender Export native viewer; the applicable registered application will be called by ApplicationXtender Export to view these files. Users have the option to pick the source of the export, and then either copy that source directly or modify it through a file save control.</li> <li>• <b>Native files:</b> are viewable in the ApplicationXtender Export native viewer, include: <i>TIFF G4, TIFF LZW, BMP, (JPEG), JBIG, GIF, TEXT, RTF, PDF, HTML</i>.</li> </ul>
Extension - (Required, for Foreign files only)	<p>If <b>Export Type</b> is set to <b>Foreign</b>, a file extension for that document type must be typed in the <b>Extension</b> text field. The file extension is necessary in order for ApplicationXtender Export to properly run foreign documents.</p> <p> <b>Note:</b> Be sure to enter the file extension without the leading “.” character. For example, if you are exporting JPEG 2000 files, enter “jp2” in the text field.</p>
Choose Value	Click the <b>Browse</b> button to display the <b>Choose Value</b> window, populating the <b>Extension</b> field with an index field value.
File Value	Select the file value from the list box.
Copy the file without modification (source can be any type)	Exports the file as is to the database, without making any modifications.

Element	Description
<p><b>Save the file with these settings (source must be image)</b></p>	<p>Select this option to modify the settings on an image file before exporting to the database. Settings you can modify are:</p> <ul style="list-style-type: none"> <li>• <b>File Type:</b> select the option from the list box.</li> <li>• <b>Color Format:</b> select the option from the list box.</li> <li>• <b>Compression:</b> select the option from the list box.</li> <li>• <b>Merge Annotations:</b> select this check box to merge any annotations with the image prior to export.</li> </ul>

#### 4.4.1.1.4 Index Options tab

Access the **Definition Properties** window from the **Documentum AX Export** window **Export** tab. Click the **New** button to display the **Definition Properties** window. The window also displays if you select an existing definition set from the **Definition Set** list and click **Edit**. Settings on the **Index Options** tab include:

**Table 4-5: Index Options tab**

Element	Description
<p><b>Duplicate Index Action</b></p>	<p>The choices available in the <b>Duplicate Index Action</b> list box are:</p> <ul style="list-style-type: none"> <li>• <b>Do Nothing:</b> does not modify the repository. If there is a document with the same index data, that document will not be modified. Index fields will not change and pages will not be added.</li> <li>• <b>Error:</b> aborts the export and reports an error of “duplicate document found”. This is the default option.</li> <li>• <b>Merge:</b> adds the files to the first document matching all the index values. The files will be appended as the last pages of the document.</li> <li>• <b>New:</b> continues with the creation of a new document. The original document remains, and a new document is created with all the same index data. The end result is multiple documents with the same index data.</li> <li>• <b>Replace:</b> replaces all pages in the first document matching all the index values. <b>Replace</b> deletes the original document and replaces it with the new document and same index data.</li> </ul>
<p><b>Overwrite Key Data</b></p>	<p>Select the <b>Overwrite Key Data</b> checkbox to instruct the module to update Data Reference fields tied to Key Reference fields when the document is exported. If this checkbox is selected, Key data fields will be updated (overwritten) by the exporter. Non Data or Key fields will not be affected.</p> <p>Setting a Key Reference field enables the lookup of Data Reference fields. Data Reference fields are automatically populated and modification of a Data Reference field changes that field for all documents which match the Key Reference field. For help on working with <i>Key</i> and <i>Reference Data</i> fields, see the <i>OpenText Intelligent Capture - Administration Guide (ECPCORE-AON)</i>.</p>

#### 4.4.1.1.5 Full Text tab

Access the **Definition Properties** window from the **Documentum AX Export** window **Export** tab. Click the **New** button to display the **Definition Properties** window. The window also displays if you select an existing definition set from the **Definition Set** list and click **Edit**. Settings on the **Full Text** tab include:

**Table 4-6: Full Text tab**

Element	Description
Do not submit to Index Server	This is the default selection. Unless <b>Submit to Index Server</b> is enabled, documents will not be routed to Full Text Indexing.
Submit to Index Server	Sends the job into the full text queue.  Select the processing queue for your job from the <b>Processing Queue</b> list box. Full text queues are text indexes of a document, consisting of <i>OCR</i> data, against which queries will be made. Processing queues are queried internally from ApplicationXtender Export, so an ApplicationXtender Export Index Server must be available.



**Note:** A full text query can be used to verify that a job was processed. You can also use ApplicationXtender Export Index Server Monitor to verify a job. The **Log** tab of the Monitor displays the OCR and Index jobs with the timestamp, application ID, and document ID.

#### 4.4.1.1.6 Workflow Login tab

Access the **Definition Properties** window from the **Documentum AX Export** window **Export** tab. Click the **New** button to display the **Definition Properties** window. The window also displays if you select an existing definition set from the **Definition Set** list and click **Edit**. Settings on the **Workflow Login** tab include:

**Table 4-7: Workflow Login tab**

Element	Description
Do not connect to Workflow Server	This is the default selection. Unless <b>Connect to Workflow Server</b> is selected, no connection will be established with a workflow server.

Element	Description
<b>Connect to Workflow Server:</b>	<p>To connect to a Workflow server, enter the following information:</p> <ul style="list-style-type: none"> <li>• <b>Workflow Database:</b> Type the name of the database to use (required).</li> <li>• <b>Workflow Database Server:</b> Type the name of the server to connect to (required).</li> <li>• <b>Use the ApplicationXtender login:</b> Select this checkbox to use the ApplicationXtender Export log in as the WorkflowXtender log in.</li> <li>• <b>User Name and Password:</b> If the ApplicationXtender Exportlog in is not enabled, type the user name and password to use as the WorkflowXtender log in This option is not available if the <b>Use the ApplicationXtender login</b> checkbox is selected.</li> </ul>

#### 4.4.1.2 Documentum AX Export Login

The following options are available from the **Documentum AX Export Login** window:

**Table 4-8: Documentum AX Export Login Window**

Element	Description
<b>Data Source</b>	In the text box, type the name of the Documentum ApplicationXtender Export Server to which you want to connect.
<b>User name</b>	Type a valid user name in the text box.
<b>Password</b>	Type a valid password for the specified user name in the text box.
<b>You will remain connected to the following sessions until the module exits</b>	<p>Displays a list of connected sessions:</p> <ul style="list-style-type: none"> <li>• <b>Data Source:</b> Displays the name of the server to which the module is connected.</li> <li>• <b>User name:</b> Displays the name of the user logged in to the server session.</li> </ul>
<b>Connect</b>	Click the <b>Connect</b> button to initiate a connection to the server, once all required fields, such as <b>server</b> , <b>user name</b> , <b>password</b> , and <b>domain</b> , have been provided.
<b>Disconnect</b>	Select the connection to close from the <b>Server</b> list, then click the <b>Disconnect</b> button to close the selected connection.

Element	Description
OK	Click <b>OK</b> to save the login information, close the <b>Documentum AX Export Login</b> window, and display the <b>Documentum AX Export</b> window.
Cancel	Click <b>Cancel</b> to close the window without preserving any setting changes.

### 4.4.1.3 Documentum AX Export

The following options are available in the **Documentum AX Export** window.

**Table 4-9: Documentum AX Export Window**

Element	Description
File menu	Displays the options available from the module <b>File menu</b> for opening and closing batches, initiating export, establishing server sessions and setting up the step.
Run menu	Displays the options available from the module <b>Run menu</b> for running single batches or all batches.
Help menu	Provides access to the help system where you can find information to guide you while working in the module.
Toolbar	Displays the options available from the module <b>Toolbar</b> for controlling module production activities.
Status bar	Displays the information available from the module <b>Status bar</b> .
Task pane	<ul style="list-style-type: none"> <li>• <b>Task Progress:</b> The progress bar indicates the overall progress of task completion.</li> <li>• <b>Processing from batch:</b> Displays the name of the batch currently being processed.</li> <li>• <b>Instance:</b> Displays the name of the current step.</li> <li>• <b>Task Node:</b> Displays the name of the node currently being processed.</li> <li>• <b>Tasks remaining on server:</b> Displays the number of tasks in the current batch remaining on the server.</li> </ul>
Detail pane	Displays the details of every task performed by the module, including module startup, batch selections, and task progress. A date and time stamp for each task is listed.

#### 4.4.1.3.1 File Menu

The **File** menu of the **Documentum AX Export** window includes the following options:

**Table 4-10: File Menu**

Element	Description
Sessions	Displays the <b>Documentum AX Export Login</b> window for establishing server sessions for batch processing of tasks without embedded session login information.
Open Batch	Displays the <b>Open Batch</b> window for selecting a batch for processing.
Close Batch	Closes an open batch.
Set Up Instance	Displays the <b>Documentum AX Export (setup)</b> window, allowing you to specify custom settings for the Open Batch.
Process Batch	Processes the open batch. A batch must be open for this option to be available on the menu.
Exit	Exits the ApplicationXtender Export module, closing all associated windows and components.

#### 4.4.1.3.2 Run Menu

The **Run** menu of the **Documentum AX Export** window includes the following options:

**Table 4-11: Run Menu**

Element	Description
All Batches	Runs the exporter on all currently open batches. Run All Batches is a Wait for Task mode (a mode in which you can only process batches that are queued on the Intelligent Capture Server for the module). In Run All Batches mode, the module receives any queued tasks from any open batch as the tasks become available from the Intelligent Capture Server.
Single Batch	Runs the exporter on a single batch. Run Single Batch is a Wait for Task mode. In Run Single Batch mode, you choose a single queued batch to process.
Acknowledge All Errors	Report all errors.

Element	Description
Acknowledge Error	Report the next error.
Stop	Stops all processing. Cancels processing of the current task and stop accepting tasks from the Enterprise Server.

#### 4.4.1.3.3 Status Bar

The **Status bar** of the **Documentum AX Export** window includes the following information:


**Table 4-12: Status Bar**








Element	Description
Current status	Displays messages indicating the current state of the module.
Number of images processed	Shows the number of images the module has processed since it was last started. If no images have been processed, then no number displays.
Domain \ name	Shows the domain and name of the logged-in user, reminding you of how you logged in when you started the module in production mode.
InputAccel Server	Displays the name of the Intelligent Capture Server that sent the task currently being processed. This information can be important when you are processing tasks with a module that is connected to a ScaleServer group.

#### 4.4.1.3.4 Toolbar

The **Documentum AX Export** window toolbar provides you with buttons to run or close export processes.

**Table 4-13: Documentum AX Export Window Toolbar**

Button	Button Name	Description
	Sessions	Displays the <b>Documentum AX Export Login</b> window so you can open server sessions for batch processing of tasks without embedded session log in information.

Button	Button Name	Description
	<b>Open Batch</b>	Displays the <b>Open Batch</b> window for selecting an available batch to process.
	<b>Close Batch</b>	Closes an open batch.
	<b>Set Up Instance</b>	Displays the <b>Documentum AX Export (setup)</b> window, allowing you to specify custom settings for the open batch.
	<b>Export</b>	Processes the open batch.
	<b>Run All Batches</b>	Runs the exporter on all currently open batches. Run All Batches is a Wait for Task mode (a mode in which you can only process batches that are queued on the Intelligent Capture Server for the module). In Run All Batches mode, the module receives any queued tasks from any open batch as the tasks become available from the Intelligent Capture Server.
	<b>Run Single Batch</b>	Runs the exporter on a single batch. Run Single Batch is a Wait for Task mode. In Run Single Batch mode, you choose a single queued batch to process.
	<b>Stop</b>	Cancels processing of the current task and stops the module from accepting additional tasks from the server.

#### 4.4.1.4 Documentum AX Export (Setup)

The **Documentum AX Export (setup)** window includes the following elements and is used to set up the module:

**Table 4-14: Documentum AX Export (setup) Window**

Element	Description
Login tab	Displays the options on the <b>Login</b> tab for establishing a connection to the Documentum ApplicationXtender Export Server and for configuring automatic logon.
Export tab	Displays the options on the <b>Export</b> tab for creating, modifying, and deleting definitions, selecting a definition to export, and establishing rules that prompt the system when to create a document.
Errors tab	Displays the options on the <b>Errors</b> tab for configuring error handling and recovery.
Logging tab	Displays the options on the <b>Logging</b> tab for setting up logging of informational and error messages, and determining a save location for the errors log file.
Info tab	Displays the options on the <b>Info</b> tab for verifying step and server connection properties.
OK	Click the <b>OK</b> button to save the settings defined in the Setup window.
Cancel	Click the <b>Cancel</b> button to close the Setup window without saving any setting changes.

##### 4.4.1.4.1 Login tab

The **Documentum AX Export** window **Login** tab settings include:

**Table 4-15: Documentum AX Export Window**

Element	Description
Data Source	Type the ApplicationXtender Export data source name (optional).
User Name	In the <b>User name</b> field, enter a valid user ID for the selected repository server.
Password	In the <b>Password</b> field, enter a valid password.

Element	Description
<p><b>Connect</b></p>	<p>Click <b>Connect</b> to initiate a connection to the repository server using the specified credentials. If the module is able to connect to the repository server, the <b>Connection Status</b> field shows the connection information. If the module is not able to connect, select a different server or supply different connection credentials.</p>
<p><b>Automatic Login</b></p>	<p>Select the <b>Use the above user and password for tasks sent to this instance</b> checkbox to use the information supplied in the <b>Server, User Name, Password</b> and Data source fields to automatically log in when tasks are sent to this step.</p> <p>When the <b>Use the above user and password for tasks sent to this instance</b> checkbox is selected, the <b>Disconnect When</b> list box becomes available. Select the disconnect event for task-based connections:</p> <ul style="list-style-type: none"> <li>• <b>The task is finished:</b> The module disconnects from the repository or server when the task finishes. Select this option if you have a limited number of licenses and need to connect from multiple clients.</li> <li>• <b>A different login is received:</b> The module remains connected to the specified repository or server until it receives a task that specifies different credentials. It then disconnects from any other task-based connections before connecting using the new task's credentials. Select this option when most tasks are exported to a single repository or server as this requires fewer logout/login cycles can improve performance.</li> <li>• <b>The module exits:</b> Once connection to the server is established, the module remains connected to this server until it exits. Select this option when you have sufficient licenses for all clients that are simultaneously accessing the server, as this will require no logout and fewer login cycles and can improve performance.</li> </ul>

Element	Description
Connection status	<p>The information in the <b>Connection Status</b> field displays one of the following:</p> <ul style="list-style-type: none"> <li>• When <b>Connected to &lt;server_name&gt; as &lt;user_ID&gt;</b> displays, the module is already logged in with the credentials indicated. If this connection is valid for setting up the current step, perform other setup tasks and then click <b>OK</b> to save your settings and exit setup mode.</li> <li>• When <b>Connected to &lt;server_name&gt; as &lt;user_ID&gt;</b> displays but the connection is not valid for setting up the current step, click <b>Disconnect</b>.</li> <li>• When <b>Not connected</b> displays, you are not logged on to the module.</li> </ul>
Disconnect	To connect to a different server, click <b>Disconnect</b> .

#### 4.4.1.4.2 Export tab

The **Documentum AX Export** window **Export** tab settings include:

**Table 4-16: Export tab**

Element	Description
Definition Set	Displays the list of defined definitions. Click <b>New</b> or select a definition from the <b>Definition Set</b> and click <b>Edit</b> to display the <b>Definition Properties</b> window to create definitions or modify existing ones. Select a definition and click <b>Delete</b> to remove it from the <b>Definition Set</b> list.
Definition to Export	Type a value or select the <b>Browse</b> button to select an IA value to determine the document definition that the module uses. This value will remain static when the exporter is used in conjunction with the Wizard. Click the <b>Browse</b> button to display the <b>Choose Value</b> window for inserting an IA Value to use as the export definition.
Create a new document when this value changes	Determines where a new document will be created. Click the <b>Browse</b> button to display the <b>Choose Value</b> window for inserting an IA Value to use as the export definition.

#### 4.4.1.4.3 Errors tab

The **Documentum AX Export** window **Errors** tab settings specify how the module responds when an error occurs during processing. The options you select depends primarily on whether you are planning to use the module in an attended or unattended mode during production. Error handling options also determine what happens when the module receives a task that specifies a server for which it does not have credentials.

If an error occurs, the module finishes the task with a Success status provided it can process the rest of the pages in the task and the **Skip node that produced the error and continue with remaining nodes** option is selected. The Success status causes the module to trigger the Finish event so that the step can call its Finish event handler.

The module triggers the Error event only if the task finishes with a Failure status. A Failure status occurs if the task was aborted, either because of a user response to an error prompt, or because **Abort entire task** was selected during setup. In this case, the module calls an Error event handler.

Most export module errors are due to attempts to overwrite existing files or lack of adequate disk space.

Table 4-17: Errors tab

Element	Description
When an Error Occurs	<p>Select the <b>Prompt for an action</b> or <b>Automatically respond with the following actions</b> depending on whether or not production will occur on an attended or unattended workstation.</p> <p><b>Prompt for an action:</b> This option is for attended workstations only. Selecting this option suspends processing until the operator responds to the <b>Production Error</b> window.</p> <p><b>Automatically respond with the following actions:</b> This option is for unattended workstations or when operator intervention is not necessary. You can specify the following settings when this option is selected.</p> <ul style="list-style-type: none"> <li>• <b>Abort entire task:</b> Aborts the current task and returns an appropriate <i>&lt;ExportResult&gt;</i> IA Value, which is evaluated by instructions in the <i>IPP Finish</i> event handler. The module may or may not continue processing other tasks depending on how you set the remaining options in this section. If you do not plan to provide error handling in your IPP, you should select the default settings of <b>Abort entire task</b> and <b>Set the batch priority to 0</b> when automatically responding to errors to avoid an ongoing, error retry situation.</li> <li>• <b>Skip node that produced the error and continue with remaining nodes:</b> Skips the node where error occurred and attempts to continue with the remaining nodes in the task, if any. The module returns an appropriate <i>&lt;ExportResult&gt;</i> IA Value for the node that produced the error occurred, which is evaluated by instructions in the <i>Finish</i> event handler of the IPP.</li> <li>• <b>Stop receiving tasks after current task:</b> Stops receiving tasks from the Intelligent Capture Server when an error occurs in the current task. This is equivalent to the operator choosing the Stop command.</li> <li>• <b>Set the batch priority to 0:</b> Sets the batch priority of the current task to 0 when an error occurs. This takes the batch off line,</li> </ul>

Element	Description
	<p>preventing further processing by any module until the administrator resets the batch priority. When this checkbox is cleared, the batch priority is not changed and batch processing continues as before the error occurred, except as specified in the IPP Error event handler (when you select <b>Abort entire task</b>) or in the Finish event handler (when you select <b>Skip node that produced the error and continue with remaining nodes</b>) in response to the &lt;ExportResult&gt; IA Value.</p>
<p>Recovery Options</p>	<ul style="list-style-type: none"> <li>• <b>Automatically retry n times before reporting error:</b> Select the checkbox if you want the module to automatically retry processing the task that caused an error. Specify the number of times it should retry in the field to the right. Some error conditions can cease to exist upon subsequent attempts at processing a task. For example, a temporary file or record lock in the repository server might cause an error, but might be resolved by the time the module attempts to process the task again. Clear the checkbox if you do not want the module to retry tasks that produce errors.</li> <li>• <b>Skip nodes that have already been successfully processed by this instance:</b> Prevents the module from reprocessing nodes that have already been successfully processed. When this field is cleared, the module will reprocess all nodes in the task, even those that have already been successfully processed.</li> </ul>



**Note:** When the module encounters an error in a task during production and no error routine is provided in the IPP, the task finishes with an error and is re-queued. The task is then again submitted to the module for processing and is likely to cause an error again, and repeats this cycle indefinitely. If you do not plan to provide error handling in your IPP, select **Abort Entire Task** and **Set The Batch Priority To 0** when automatically responding to errors to avoid this error retry situation. Select **Automatically Respond With The Following Options** if you are running the module in unattended mode.

#### 4.4.1.4.4 Logging tab

The **Documentum AX Export** window **Logging** tab settings enable you to specify how the module records error messages and informational messages as it processes tasks in production mode. The options you select depend primarily on whether you want to have a log of error messages, informational messages, or both.

**Table 4-18: Logging tab**

Element	Description
Log messages to a file	<p>Log messages to a specified file. When selected activates <b>Severity to log</b> and <b>File name</b>.</p> <ul style="list-style-type: none"> <li>• <b>Severity to log:</b> Select the appropriate logging level.</li> <li>• <b>File name:</b> Contains the name and location of the log file name. You can use the <b>Browse</b> button to point to the file location from the <b>Select</b> window. When you log messages to a shared location and are running multiple copies of the module, you must specify a unique log file name for each module step by specifying the appropriate IA values in the file name.</li> </ul>
Send error messages to the InputAccel Server's Event Log	Select the checkbox to log error messages to the Intelligent Capture Server.

#### 4.4.1.4.5 Info tab

The **Documentum AX Export** window **Info** tab displays module and server information. This information is read-only and cannot be edited from this tab. Modification of any of these properties must be completed during module setup. Settings on this tab include:

**Table 4-19: Info tab**

Element	Description
Instance Properties	<ul style="list-style-type: none"> <li>• <b>Name:</b> The name of the module step as declared in the <i>IPP</i>.</li> <li>• <b>Departments:</b> The names of departments defined in the batch or process.</li> <li>• <b>Process/Batch name:</b> The name of the batch or process that contains the module step.</li> <li>• <b>Process/Batch ID:</b> The unique ID number of the batch or process that contains the module step.</li> </ul>

Element	Description
InputAccel Server Connection	<ul style="list-style-type: none"> <li>• <b>Server name:</b> The Intelligent CaptureServer name that is connected to the client workstation. This is the server that owns the batch or process you are setting up.</li> <li>• <b>Username:</b> The domain and user ID specified when the connection to the Intelligent Capture Server was established in setup mode.</li> </ul>
About	Click the <b>About</b> button to display information about the module, such as version number and copyright details.

## 4.4.2 IA Values

The topics in this section describe IA values that can be used with this application.

### 4.4.2.1 Input IA Values

Input IA Values include input file variables, such as `<Level0_InputFile1>`. These values serve as pointers to stage files and input processing variables. They store setup data that a module uses to process tasks and includes default and user-defined module settings.

**Table 4-20: Input IA Values**

IA Value	Description
<code>&lt;Level&lt;n&gt;_InputFile&gt;</code>	<p>The input file for the task on the Intelligent Capture Server at the specified level, <code>&lt;n&gt;</code>.</p> <ul style="list-style-type: none"> <li>• Attributes: File, Input, NoTrigger</li> <li>• Level: 07</li> </ul>
<code>&lt;Ready&gt;</code>	<p>A secondary trigger value that can be used when no file values are specified or when another trigger is needed to adequately control the beginning of processing.</p> <p>If this value is used in the <i>IPP</i>, then it is a trigger. When all trigger values are non-zero, the module processes the current task.</p> <ul style="list-style-type: none"> <li>• Attributes: File, Input, Trigger</li> <li>• Level: T</li> </ul>

IA Value	Description
<Level<n>_Path>	<p>The path to which to export files. This can consist of hard-coded path names and/or any number of <i>IA</i> Values that resolve into all or portions of a valid path.</p> <p>The path can be specified as a direct Windows path name or as a <i>UNC</i> path.</p> <ul style="list-style-type: none"> <li>• Attributes: String, Input, NoTrigger</li> <li>• Level: 07</li> </ul>
<Level<n>_Filename>	<p>The file name and extension of the file to export. Can consist of hard coded strings and/or any number of <i>IA</i> Values that resolve into all or portions of a valid file name.</p> <p>In most cases, you will need to specify one or more <i>IA</i> Values to create a file name that is unique for each file that is exported, so you do not overwrite existing files.</p> <ul style="list-style-type: none"> <li>• Attributes: String, Input, NoTrigger</li> <li>• Level: 07</li> </ul>
<Level<n>_Processed>	<p>Setting this value to 1 indicates that this node has already been processed (and can be skipped if configured to do so in setup).</p> <ul style="list-style-type: none"> <li>• Attributes: Long, Input, NoTrigger</li> <li>• Level: 07</li> </ul>

#### 4.4.2.2 Output IA Values

Output IA Values include output processing variables which store data that are generated during processing. The module does not output any files to the Intelligent Capture Server. There are no File-type output values. The following table describes output values.

**Table 4-21: Output IA Values**

IA Value	Description
Status and error variables	

IA Value	Description
<ErrorName>	<p>The error class name, if any, of an error that occurred while processing this task. Because this string never localized, you can reliably use it in conditional processing in your <i>IPP</i>. It is an improvement over <code>ErrorNumber</code> because it is the fully qualified class name, including the namespace that defines it, and will never have a different meaning in different contexts, as <code>ErrorNumber</code> might.</p> <ul style="list-style-type: none"> <li>• Attributes: String, Output</li> <li>• Level: T</li> </ul>
<ErrorNumber>	<p>The error number of the error, if any, that occurred while processing this task.</p> <ul style="list-style-type: none"> <li>• Attributes: Long, Output</li> <li>• Level: T</li> </ul>
<ErrorText>	<p>The text string of the error, if any, that occurred while processing this task.</p> <ul style="list-style-type: none"> <li>• Attributes: String, Output</li> <li>• Level: T</li> </ul>
<TaskResult>	<p>If the task completes successfully, this value is set to zero. Otherwise, this value contains a non-zero number indicating that an error occurred. You can check this value in a Finish event handler to determine whether any tasks need to be processed again or routed to an operator for handling. To determine which tasks need to be examined, check the <code>Level&lt;n&gt;_ErrorText</code> IA Value to find the node where the error occurred.</p> <ul style="list-style-type: none"> <li>• Attributes: Long, Output</li> <li>• Level: T</li> </ul>
<Level<n>_ErrorName>	<p>The error class name, if any, of an error that occurred while processing the node corresponding to n. Because this string is never localized, you can reliably use it in conditional processing in your IPP. It is an improvement over <code>ErrorNumber</code> because it is the fully qualified class name, including the namespace that defines it, and will never have a different meaning in different contexts, as <code>ErrorNumber</code> might.</p> <ul style="list-style-type: none"> <li>• Attributes: String, Output</li> <li>• Level: 07</li> </ul>

IA Value	Description
<Level<n>_ErrorNumber>	<p>The error number of the error, if any, that occurred while processing node corresponding to &lt;n&gt;.</p> <ul style="list-style-type: none"> <li>• Attributes: Long, Output</li> <li>• Level: 07</li> </ul>
<Level<n>_ErrorText>	<p>The text string of the error, if any, that occurred while processing node corresponding to &lt;n&gt;.</p> <ul style="list-style-type: none"> <li>• Attributes: String, Output</li> <li>• Level: 07</li> </ul>
<Level<n>_Processed>	<p>A value that is set to 1 when the task's nodes of level &lt;n&gt; have all been processed.</p> <ul style="list-style-type: none"> <li>• Attributes: Long, Output</li> <li>• Level: 07</li> </ul>
Statistical variables	
<StartTime>	<p>The time at which processing on the current task began. This value is in the format of the operating system's long time format.</p> <ul style="list-style-type: none"> <li>• Attributes: String, Output</li> <li>• Level: T</li> </ul>
<StartDate>	<p>The date on which processing on the current task began. This value is in the format of the operating system's short date format.</p> <ul style="list-style-type: none"> <li>• Attributes: String, Output</li> <li>• Level: T</li> </ul> <p>Do not leave this field blank as it will result in failure to export to ApplicationXtender.</p>
<EndTime>	<p>The time at which processing on the current task completed. This value is in the format of the operating system's long time format.</p> <ul style="list-style-type: none"> <li>• Attributes: String, Output</li> <li>• Level: T</li> </ul>
<EndDate>	<p>The data on which processing on the current task completed. This value is in the format of the operating system's short date format.</p> <ul style="list-style-type: none"> <li>• Attributes: String, Output</li> <li>• Level: T</li> </ul> <p>Do not leave this field blank as it will result in failure to export to ApplicationXtender.</p>

IA Value	Description
<TotalTime>	<p>Total processing time of the current task in milliseconds.</p> <ul style="list-style-type: none"> <li>• Attributes: Long, Output</li> <li>• Level: T</li> </ul>
<Level<n>_StartTime>	<p>The time at which processing on the current page began. This value is in the format of the operating system's long time format.</p> <ul style="list-style-type: none"> <li>• Attributes: String, Output</li> <li>• Level: 07</li> </ul>
<Level<n>_StartDate>	<p>The date on which processing on the current page began. This value is in the format of the operating system's short date format.</p> <ul style="list-style-type: none"> <li>• Attributes: String, Output</li> <li>• Level: 07</li> </ul>
<Level<n>_EndTime>	<p>The time at which processing on the current page completed. This value is in the format of the operating system's long time format.</p> <ul style="list-style-type: none"> <li>• Attributes: String, Output</li> <li>• Level: 07</li> </ul>
<Level<n>_EndDate>	<p>The date on which processing on the current page completed. This value is in the format of the operating system's short date format.</p> <ul style="list-style-type: none"> <li>• Attributes: String, Output</li> <li>• Level: 07</li> </ul>
<Level<n>_TotalTime>	<p>Total processing time of the current page in milliseconds.</p> <ul style="list-style-type: none"> <li>• Attributes: Long, Output</li> <li>• Level: 07</li> </ul>
<Operator>	<p>The user name of the operator who is logged into the module.</p> <ul style="list-style-type: none"> <li>• Attributes: String, Output</li> <li>• Level: T</li> </ul>

## Chapter 5

# FileNet Content Manager Export

This section includes the Intelligent Capture specialized enterprise export module: **ecpcore-cxf**.

For information about common features and functionalities in the Intelligent Capture client modules, see *OpenText Intelligent Capture - Module Reference (EPCORE-CMD)*.

The FileNet Content Manager Export module exports Intelligent Capture files to a FileNet Content Manager system. The module can export files to any location that is accessible to the machine on which the module is running. FileNet Content Manager Export can be set up so that it does not alter exported files in any way. This means that any type of file can be exported as is to the FileNet system. You can export and store any type of document as well as map IA Values to index fields within document classes in the FileNet system.



**Note:** The FileNet Content Manager Export module only supports connection and export to one FileNet object store at a time. The module does not support multiple object store export.

## 5.1 Features

FileNet Content Manager Export features include:

---

### Data export to a FileNet Content Manager server

Establishes a direct connection between the module and a FileNet server, which enables you to export data processed by Intelligent Capture to a FileNet Content Manager system.

---

### Document identification and classification before export

Provides the ability to configure specific file definitions for exported documents using document classes and index field mappings. The module provides access to a list of the available document classes that exist on your FileNet server.

---

### Direct mapping between IA Values and index fields

Provides the ability to assign item definitions to document types and map IA Values to index fields in FileNet. You can create item definitions and select an item definition for each exported document using a single IA Value.

---

### IA Values to specify output locations

Provides the ability to define specific export locations using a combination of hard-coded characters and IA Values. You can specify the path name and file

name separately for maximum flexibility. During export, FileNet Content Manager Export creates any part of the required path that does not exist. Flexible output path definitions enable document export to any location that is accessible to your local drive or network.

---

**Export and storage of any type of file from the Intelligent Capture system**  
Enables export of any type of file processed within Intelligent Capture.

---


## 5.2 Setting Up FileNet Content Manager Export

Most configuration information for Intelligent Capture client modules is defined during *module setup*. You can run a module in setup mode from Intelligent Capture Designer, from Intelligent Capture Administrator, or from a command prompt with appropriate arguments. For more information, see *OpenText Intelligent Capture - Module Reference (ECPCORE-CMD)*.

When launched in setup mode, a client module displays the **Setup** window in which you can specify the module's configuration settings.


### 5.2.1 Installing the FileNet Enterprise Manager Client

Before you connect to the FileNet Content Manager server, set up the FileNet Content Manager Export module, or export documents, install the FileNet Enterprise Manager client on the client workstation. The client setup program configures the client computer to allow connection to the FileNet server. See your FileNet client and server installation instructions for details. You can also get more information at [www.filenet.com](http://www.filenet.com) (<http://www.filenet.com>). After installing the client, test that it can connect to the FileNet server. After you have verified a successful connection, you can begin using the module for setup and production.

 **Note:** The FileNet Content Manager Export module only supports connection to one FileNet object store at a time. Multiple object store export is not supported.

### 5.2.2 Defining Export Options

The **Export tab** on the **FileNet Content Manager Export Setup** window enables you to define a set of document definitions, define mapping between index fields and FileNet server values, create file definitions to use during files export, and criteria for creating new documents during processing of page nodes.

 **Note:** Before running setup, you must have the FileNet Enterprise Manager client installed on your workstation, and establish a working connection to the FileNet server.

Export to multiple destinations is not supported. Do not attempt to select multiple destinations or object stores. Export to one location at a time.

### 5.2.2.1 Setting File Export Options

File export options are document definitions for the exported files, and criteria for splitting documents.

**To set file export options:**

1. Run FileNet Content Manager Export for setup. The **FileNet Content Manager Export Setup** window displays.
2. Select the **Export** tab.
3. Click the **New** button, or select a **Document Definition Set**, and click the **Edit** button to set the export properties through the **Definition Properties** window.
4. Specify the **Definition to Export** and **Create a new document when this value changes**.
5. Click **OK** to save your changes.

#### Related Topics

[“Definition Properties” on page 133](#)

[“Index Mapping” on page 146](#)

### 5.2.2.2 Setting Up Definition Properties

The **Definition Properties** window enables you to configure the document definitions. The **Definition Properties** window is displayed when the **New** or **Edit** buttons are selected on the **Export** of the **Setup** window.

**To set up definition properties:**

1. Run FileNet Content Manager Export for setup. The **FileNet Content Manager Export Setup** window displays.
2. Select the **Export** tab.
3. Click the **New** button, or select a **Document Definition Set**, and click the **Edit** button. The **Definition Properties** window displays.
4. Select the **Document Filing** tab to specify file definition for the exported files.
5. Select the **Content** tab to specify the type of file to export.
6. Click **OK** to save the settings.



**Note:** Export to multiple destinations is not supported. Do not attempt to select multiple destinations or object stores. Export to one location at a time.

#### Related Topics

[“Setting Up Index Mapping” on page 132](#)

[“Setting File Export Options” on page 131](#)

### 5.2.2.3 Setting Up Index Mapping

The **Index Mapping** window is displayed when the **Add** or **Edit** buttons are selected on the **Definition Properties** window.

**To set up index mapping:**

1. Run FileNet Content Manager Export for setup. The **FileNet Content Manager Export Setup** window displays.
2. Select the **Export** tab.
3. Click the **New** button, or select a **Document Definition Set**, and click the **Edit** button. The **Definition Properties** window displays.
4. Click the **Add** or **Edit** buttons and the **Index Mapping** window displays.
  - If you click the **Add** button, the window is automatically populated with default values.
  - If you click the **Edit** button, then this window is populated with values from the definition selected on the **Export** tab in setup mode.
5. Specify settings for **Index Field**, **Value**, **Data Type**, and click **Add**.
6. Click **Done** to save your work.

#### Related Topics

[“Definition Properties” on page 133](#)

[“Index Mapping” on page 146](#)

## 5.3 Running FileNet Content Manager Export in Production

After the module has been set up, tested, and placed in a production environment, operators and administrators will run the module in production.

For information related to common production tasks for unattended modules, see *Running a Module for Production*.



**Note:** The *Running Modules in Production Mode* section contains production topics that are common to many unattended modules and may not apply to this module.

## 5.4 Reference—FileNet Content Manager Export

The topics within this section contain reference information useful while using the application in setup or production.

### 5.4.1 Windows

The topics within this section provide descriptions of windows accessible from the application. The topics list the user interface element name and include a brief description of actions available from the window.

#### 5.4.1.1 Definition Properties

Definition properties are assigned to exported and stored document types and map IA Values to index fields within document classes. To display the **Definition Properties** window, select **New** or **Edit** on the **Export** tab of the **FileNet Content Manager Export Setup** window.

This window provides access to the **Index Mapping** window where you define mappings between index fields and FileNet server values.

The tabs on the **Definition Properties** window are:

**Table 5-1: Definition Properties Window**

Element	Description
<b>Document Filing</b> tab	For specifying file definitions.
<b>Content</b> tab	For specifying the type of file to export.

### Related Topics



[“Defining Export Options” on page 130](#)

#### 5.4.1.1.1 Document Filing tab

The **Document Filing** tab of the **Definition Properties** window lets you specify the file definition for the exported files. The settings on this tab are:

**Table 5-2: Definition Properties Window, Document Filing tab**

Element	Description
<b>Definition name</b>	The definition name.
<b>Object Store</b>	Type the definition name and select a value in the field.

Element	Description
<p><b>Document Class</b></p>	<p>These values are obtained from the value you selected in the <b>Object Store</b> field and contain the names of all of the available document classes on that object store.</p> <p> <b>Note:</b> Selecting a new document class causes the contents of the <b>Index Mapping</b> list box to be reset to contain the index fields for the new class. In this situation, all previous mappings are lost.</p>
<p><b>Index Field Mappings</b></p>	<p>View the currently mapped items, including the field and mapped IA Values.</p> <p>Click <b>Add</b> or <b>Edit</b> to display the <b>Index Mapping</b> window. For more information, see <a href="#">Setting up index mapping</a>.</p> <ul style="list-style-type: none"> <li>• <b>Add:</b> Automatically populates the <b>Index Mapping</b> window with default values.</li> <li>• <b>Edit:</b> Opens the <b>Index Mapping</b> window and populates it with values from the selected definition. This button is unavailable if no mappings are selected.</li> <li>• <b>Delete:</b> Deletes the currently selected mapping. This button is unavailable if no mappings are selected.</li> </ul>
<p><b>Folder Path</b></p>	<p>Select or type the path to the folder in which the document is stored. If the path does not exist, the folder structure is created for you.</p> <p> <b>Note:</b> The export path must end in a backslash (\).</p>
<p><b>Retrieve Last Document ID Test</b></p>	<p>Select the checkbox to retrieve documents immediately after they are stored to verify that they do exist on the server. Clear this checkbox to leave the documents in the server.</p>

**Related Topic**

“Content tab” on page 135

### 5.4.1.1.2 Content tab

The **Content** tab on the **Definition Properties** window lets you specify the type of file to export. The settings on this tab are:

**Table 5-3: Definition Properties Window, Content tab**

Element	Description
File Value	Select a value.
Copy the file without modification (source can be of any type)	Select to export the file in the FileNet server without changing to the file.
Save the file with these settings (source must be image)	Select to modify the original file before storing the file in the FileNet server. Select from the following: <ul style="list-style-type: none"> <li>• <b>File Type:</b> Select the type of file.</li> <li>• <b>Color Format:</b> Select if you want to store the file in black and white or color.</li> <li>• <b>Compression:</b> Select the compression that you want for the file.</li> </ul>
Merge Annotations	Select this checkbox if you want to copy annotations into the file from the original file. Clear this checkbox to maintain annotations only in the original file.
Filename area	Type or select the name for the stored file in the <b>File name</b> field.
Extension	Select the file extension of the file to be exported.

### Related Topic

[“Document Filing tab” on page 133](#)

### 5.4.1.2 FileNet Content Manager Export

The **FileNet Content Manager Export** window is the control center for launching and monitoring export tasks.

**Table 5-4: FileNet Content Manager Export Window**

Element	Description
File menu	The <b>File</b> menu allows you to open and process batches, and open sessions for those batches.
Run menu	The <b>Run</b> menu allows you to run all available batches or a single selected batch.

Element	Description
<b>Help menu</b>	Provides access to the help system where you can find information to guide you while working in the module.
Toolbar	The FileNet Content Manager Export toolbar provides you with buttons to open sessions, launch, and close export processes.
<b>Task Progress</b>	An expanding bar represents the current task progress.
<b>Processing from batch</b>	The name of the batch that is being processed.
<b>Instance</b>	The name of the process step on which the batch is based.
<b>Task Node</b>	The current node being processed.
<b>Tasks remaining on server</b>	The number of tasks remaining to be processed.
<b>Error Message pane</b>	<p>The <b>Error Message</b> pane opens when an error is encountered during production. This pane gives a short explanation of the error. This error message also appears in the <b>Activity Messages</b> pane, where more information about the error is given.</p> <p>When you click the reported error in the <b>Error Message</b> pane, the error is highlighted in the <b>Activity Messages</b> pane. You can obtain information about the error message including the error code, and information about the batch, instance, and task in which the error occurred.</p> <p>If you double-click the reported error, it is removed from the <b>Error Message</b> pane, and a black circle with an X appears at the location of the error in the <b>Activity Messages</b> pane. The black X indicates you have reviewed the error.</p>
<b>Activity Messages pane</b>	<p>The <b>Activity Messages</b> pane reports all user and production activity and error messages during batch processing.</p> <p>When an error occurs, it is highlighted with a red circle and exclamation point. It states the error message, error code, and other relevant information about the batch, instance, and task. The error message is also reproduced in the <b>Error Message</b> pane directly above the <b>Activity Messages</b> pane.</p>

#### 5.4.1.2.1 File Menu

The **File** menu of the **FileNet Content Manager Export** window provides you with the options listed in this table.

**Table 5-5: FileNet Content Manager Export Window, File Menu**

Element	Description
Sessions	Opens the <b>FileNet P8 Logon</b> window so you can open server sessions for batch processing of tasks without embedded session logon information.
Open Batch	Opens a batch for processing in Open Batch mode.
Close Batch	Closes an open batch.
Set Up Instance	Displays the <b>FileNet Content Manager Export Setup</b> window, allowing you to specify custom settings for the open batch.
Export	Processes the open batch.
Exit	Exits the FileNet Content Manager Export module.

#### 5.4.1.2.2 Run Menu

The **Run** menu of the **FileNet Content Manager Export** window provides you with the options listed in this table.









**Table 5-6: FileNet Content Manager Export Window, Run Menu**

Element	Description
All Batches	<b>All Batches</b> mode is a “Wait for Task” mode, meaning a mode in which you can only process batches that are queued on the Intelligent Capture Server for the module. In <b>All Batches</b> mode, the module receives any queued tasks from any open batch as the tasks become available from the Intelligent Capture Server.
Single Batch	<b>Single Batch</b> mode is a “Wait for Task” mode. In <b>Single Batch</b> mode, you choose a single queued batch to process.
Stop	Cancel processing of the current task and stop accepting tasks from the Intelligent Capture Server.

### 5.4.1.2.3 FileNet Content Manager Export Toolbar

The FileNet Content Manager Export toolbar provides you with buttons to launch or close export processes.

**Table 5-7: FileNet Content Manager Export Toolbar**

Button	Button Name	Description
	Sessions	Opens the <b>FileNet P8 Logon</b> window so you can open server sessions for batch processing of tasks without embedded session logon information.
	Open Batch	Opens a batch for processing in Open Batch mode.
	Close Batch	Closes an open batch.
	Set Up Instance	Displays the <b>FileNet Content Manager Export Setup</b> window, allowing you to specify custom settings for the Open Batch.
	Export	Processes the open batch.
	Run All Batches	<b>Run All Batches</b> mode is a Wait for Task mode (a mode in which you can only process batches that are queued on the Intelligent Capture Server for the module). In <b>Run All Batches</b> mode, the module receives any queued tasks from any open batch as the tasks become available from the Intelligent Capture Server.
	Run Single Batch	<b>Run Single Batch</b> mode is a Wait for Task mode. In <b>Run Single Batch</b> mode, you choose a single queued batch to process.
	Stop	Cancel processing of the current task and stop accepting tasks from the Intelligent Capture Server.

### 5.4.1.3 FileNet Content Manager Export Setup

The **FileNet Content Manager Export Setup** window displays when you launch the module in setup mode. The available tabs on the setup window are:

- “Logon tab” on page 139
- “Export tab” on page 140
- “Logging tab” on page 141
- “Errors tab” on page 142
- “Info tab” on page 144

#### 5.4.1.3.1 Logon tab

The **Logon** tab of the **FileNet Content Manager Export Setup** window specifies the destination server for the FileNet Content Manager Export module and allows the user to set up automatic logon. The available options are:

**Table 5-8: FileNet Content Manager Export Setup Window, Logon tab**

Element	Description
<b>Server Type</b>	Select or type the name of the repository server in this field.
<b>Use Windows Login</b>	Uses the current Windows user name and password during logon.
<b>User name</b>	The user name applied when the module receives a task from this instance.
<b>Password</b>	Enables the specified user to access the repository server when a task from this module instance is received.
<b>Connect</b>	The <b>Connect</b> button is activated when you select the <b>Use Windows Login</b> checkbox, or you specify the <b>User Name</b> and <b>Password</b> for logon. Click this button to connect to the repository server.

Element	Description
<p><b>Automatic Logon</b></p>	<p>Select the <b>Use the above user and password for tasks sent to this instance</b> checkbox for automatic logon. Selecting this checkbox enables the <b>Disconnect When</b> list box.</p> <p><b>Disconnect When</b> specifies when the server can be disconnected. The available options are:</p> <ul style="list-style-type: none"> <li>• <b>The task is finished:</b> The module disconnects from the repository or server when the task finishes. Select this option if you have a limited number of licenses and require to connect from multiple clients.</li> <li>• <b>A different login is received:</b> The module remains connected to the specified repository or server until it receives a task that specifies different credentials. It then disconnects from any other task-based connections before connecting using the credentials of the new task. Select this option when most tasks are exported to a single repository or server, as fewer logout/login cycles improves performance.</li> <li>• <b>The module exits:</b> After it is connected, the FileNet Content Manager Export module remains connected to this server until the module exits. Select this option when you have sufficient licenses for all the clients that will simultaneously access the server.</li> </ul>
<p><b>Connection Status</b></p>	<p>Indicates the current state of the connection.</p>

**5.4.1.3.2 Export tab**

The **Export** tab is displayed from the **FileNet Content Manager Export Setup** window. From here, you can specify the following:

**Table 5-9: FileNet Content Manager Export Setup Window, Export tab**

Element	Description
<p><b>New</b></p>	<p>Creates a definition and opens the <b>Definition Properties</b> window on which you can configure that definition. For more information, see <b>Setting up definition properties</b>.</p>

Element	Description
<b>Edit</b>	Opens the <b>Definition Properties</b> window on which you can configure the setup for the selected definition. This button is unavailable if no definitions are selected. For more information, see <a href="#">Setting up definition properties</a> .
<b>Delete</b>	Deletes the currently selected definition. This button is unavailable if no definitions are selected.
<b>Definition to Export</b>	Determines the document definition that the module uses. Type a value or click the <b>Browse</b> button to select an IA Value.
<b>Create a new document when this value changes</b>	Determines when a new document is created. Type a value or click the <b>Browse</b> button to select an IA Value. Page nodes are evaluated in order and a new document is created each time the definition values change as a result of the inserted IA Values.

## Related Topics

[“Setting File Export Options” on page 131](#)

[“Setting Up Definition Properties” on page 131](#)

[“Setting Up Index Mapping” on page 132](#)

### 5.4.1.3.3 Logging tab

The **Logging** tab on the [FileNet Content Manager Export module Setup](#) allows you to control the output of error information generated during task processing. The **Logging** tab options are:

**Table 5-10: FileNet Content Manager Export Setup Window, Logging tab**

Element	Description
<b>Log messages to a file</b>	Log messages to a specified file. Activates the <b>Severity to log</b> and <b>File name</b> options when selected.
<b>Severity to log</b>	From the list box, select: <ul style="list-style-type: none"> <li>• <b>Errors Only</b></li> <li>• <b>Errors and Information</b></li> </ul>

Element	Description
<b>File name</b>	Contains the name and location of the log file name. You can use the <b>Browse</b> button to point to the file location from the <b>Select</b> window. When you log messages to a shared location and are running multiple copies of the module, specify a unique log file name for each module instance by specifying the appropriate IA Values in the file name.
<b>Send error messages to the InputAccel Server's Event Log</b>	Logs error messages to the Intelligent Capture Server.

#### 5.4.1.3.4 Errors tab

The **Errors** tab is found on the **FileNet Content Manager Export Setup**. The **Errors** tab settings are:

**Table 5-11: FileNet Content Manager Export Setup Window, Errors tab**

Element	Description
When an Error Occurs	<p><b>Prompt for an action:</b> Selecting this option suspends processing until the operator responds. Select <b>Prompt for an action</b> to prompt the operator to login to Content Manager sessions as the module receives tasks that specify different sessions.</p> <p>Automatically respond with the following actions:</p> <ul style="list-style-type: none"> <li>• <b>Abort entire task:</b> Aborts the current task and returns an appropriate <i>&lt;ExportResult&gt;</i> IA Value, which is evaluated by instructions in the <i>IPP Finish</i> event handler. The module can continue processing other tasks depending on how you set the remaining options in this section. If you do not plan to provide error handling in your IPP, select the default settings of <b>Abort entire task</b> and <b>Set the batch priority to 0</b>. These options avoid an ongoing, error retry situation.</li> <li>• <b>Skip node that produced the error and continue with remaining nodes:</b> Skips the node where the error occurred and attempts to continue with the remaining nodes in the task, if any. The module returns an appropriate <i>&lt;ExportResult&gt;</i> IA Value for the node that produced the error, which is evaluated by instructions in the <i>Finish</i> event handler of the IPP.</li> <li>• <b>Stop receiving tasks after current task:</b> Stops receiving tasks from the Intelligent Capture Server when an error occurs in the current task. This feature is equivalent to the operator choosing the <b>Stop</b> command.</li> <li>• <b>Set the batch priority to 0:</b> Sets the batch priority of the current task to 0 when an error occurs. This functionality takes the batch off line, preventing further processing by any module until the administrator resets the batch priority. When this checkbox is cleared, the batch priority is not changed and batch processing continues as before the error occurred, except as specified in the IPP <i>Error</i> event handler (when you select <b>Abort entire task</b>) or in the <i>Finish</i> event handler (when you select <b>Skip node that produced the error and continue with</b></li> </ul>

Element	Description
	remaining nodes) in response to the <ExportResult> IA Value.
Recovery Options	<ul style="list-style-type: none"> <li>• <b>Automatically retry&lt;n&gt; times before reporting error:</b> Select the checkbox if you want the module to automatically retry processing the task that caused an error. Specify the number of times to retry in the field to the right. An example of an error that does not exist when the module retries the task is a file locking error. Some error conditions can cease to exist upon subsequent attempts at processing a task. For example, a temporary file or record lock in the repository server causes an error, but is resolved when the module processes the task again. Clear the checkbox if you do not want the module to retry tasks that produce errors.</li> <li>• <b>Skip nodes that have already been successfully processed by this instance:</b> Prevents the module from reprocessing nodes that have already been successfully processed. When this field is cleared, the module reprocesses all nodes in the task, even those tasks that are already successfully processed.</li> </ul>



**Note:** When the module encounters an error in a task during production and no error routine has been provided in the IPP, the task finishes with an error and is re-queued. The task is then resubmitted to the module for processing and is likely to cause an error again, and repeats this cycle indefinitely. If you do not plan to provide error handling in your IPP, it is recommended that you select the default settings of **Abort Entire Task** and **Set The Batch Priority** to 0 when automatically responding to errors to avoid this error retry situation. Select **Automatically Respond With The Following Options** if you are running the module in unattended mode.

#### 5.4.1.3.5 Info tab

The **Info** tab on the **FileNet Content Manager Export Setup** window displays module and server information. This information cannot be edited from this tab. Modification of any of these properties must be made during module setup.

**Table 5-12: FileNet Content Manager Export Setup Window, Info tab**

Element	Description
Name	The name of the module instance as declared in the <i>IPP</i> .

Element	Description
Departments	The names of departments defined in the batch or process.
Process/Batch name	The name of the batch or process that contains the module instance.
Process/Batch ID	The unique ID number of the batch or process that contains the module instance.
Server name	The Intelligent Capture Server name that is connected to the client workstation. This is the server that owns the batch or process you are setting up.
Username	The domain and user ID specified when the connection to the Intelligent Capture Server was established in setup mode.

#### 5.4.1.4 FileNet P8 Logon

If you did not specify login information for your batches, you can establish sessions from the **FileNet P8 Logon** window.



**Note:** If all your tasks have saved login information, then click **OK** in this window to open the **FileNet Content Manager Export** window.

**Table 5-13: FileNet P8 Logon Window**

Element	Description
Server Type	Select or type the name of the repository server in this field.
Use Windows Login	Uses the current Windows user name and password during logon. This disables the <b>User name</b> and <b>Password</b> fields.
User name	The user name applied when the module receives a task from this instance.
Password	Enables the specified user to access the repository server when a task from this module instance is received.
Connect	The <b>Connect</b> button is activated when you select the <b>Use Windows Login</b> checkbox, or you specify the <b>User Name</b> and <b>Password</b> for logon. This connects you to the repository server.
You will remain connected to the following sessions until the module exits	Indicates the current sessions to which you are connected.
Disconnect	Disconnects from the selected session.

### 5.4.1.5 Index Mapping

The **Index Mapping** window enables you to create mappings between index fields and FileNet server values.

**Table 5-14: Index Mapping Window**

Element	Description
<b>Index Field</b>	Values are index fields available for the currently selected document class. Index fields are not included in this list box if they are already mapped or are not multi-value fields.
<b>Value</b>	Select or type the value to map to the index field.
<b>Field properties</b>	Displays the data type for the currently selected index field.
<b>Add</b>	Adds a mapping between an index field and a FileNet server value.
<b>Done</b>	Saves your work.

### Related Topics

[“Defining Export Options” on page 130](#)

### 5.4.1.6 Open Batch

The **Open Batch** window enables you to select a batch to run when you are in production mode. This window can display all batches available for processing. You can also select **Show only Batches with Tasks** and click the **Refresh** button to limit the list of batches to just those batches with tasks.

### 5.4.1.7 Production Error

On attended workstations, you can prompt for operator response when you encounter errors during production if you have selected the **Prompt for an action** checkbox from the **Errors** tab on the **FileNet Content Manager Export Setup** window. When an error occurs under this situation, the **Production Error** window is displayed with the following options:

**Table 5-15: Production Error Window**

Element	Description
How do you want to handle this error	<ul style="list-style-type: none"> <li>• <b>Retry the current node:</b> Select this option when you can correct the error and, upon retry, the task is successfully completed.</li> <li>• <b>Stop all processing on this task:</b> Select this option when the task is causing the error. Stops task processing until the error is corrected.</li> <li>• <b>Continue with other nodes in this task:</b> Select this option when the node is causing the error. Skips the node with an error as task processing continues with the other nodes.</li> </ul>
and set the batch's priority to 0	Select this checkbox to stop all batch processing. Unprocessed tasks that remain in the batch are stored on the Intelligent Capture Server until an administrator resets the batch priority to non-zero. Clear this checkbox if you want to keep processing the remaining tasks in the batch.
then stop waiting for tasks	Select this checkbox if you want to stop waiting for tasks. Until you select a processing mode, task processing stops at the client workstation. Clear this checkbox when you want to continue processing tasks in the current processing mode.

## Related Topics

[“Errors tab” on page 142](#)

## 5.4.2 IA Values

The topics in this section describe IA values that can be used with this application.

### 5.4.2.1 Input IA Values

Input IA Values include input file variables, such as `<Level0_InputFile1>`, which serve as pointers to stage files, and input processing variables, which store setup data that a module uses to process tasks and includes default and user-defined module settings.

Following are the IA Values defined in `exfncm.mdf`, the *MDF* file for the FileNet Content Manager Export module. You can add custom variables to this MDF. It is recommended that you use dynamic values in an *IPP* or create a custom MDF for your variables so they are not overwritten when the product is updated.

**Table 5-16: Input IA Values**

IA Value	Description
Input file variable	
<Level<n>_InputFile>	<p>The input file for the task on the Intelligent Capture Server at the specified level, &lt;n&gt;.</p> <ul style="list-style-type: none"> <li>• <b>Attributes:</b> File, Input, No Trigger</li> </ul>
Input values	
<Ready>	<p>A secondary trigger value that can be used when no file values are specified or when another trigger is required to control the beginning of processing.</p> <p>If this value is used in the IPP, then it is a trigger. When all trigger values are non-zero, the module processes the current task.</p> <ul style="list-style-type: none"> <li>• <b>Attributes:</b> File, Input, Trigger</li> <li>• <b>Level:</b> T</li> </ul>
<Level<n>_Path>	<p>The path to which to export files. This path can consist of hard-coded path names and/or any number of IA Values that resolve into all or portions of a valid path.</p> <p>The path can be specified as a direct Windows path name or as a <i>UNC</i> path.</p> <ul style="list-style-type: none"> <li>• <b>Attributes:</b> String, Input, NoTrigger</li> <li>• <b>Level&lt;n&gt;:</b> &lt;n&gt; = 0-7</li> </ul>
<Level<n>_Filename>	<p>The file name and extension of the file to export. Can consist of hard-coded strings and any number of IA Values that resolve into all or portions of a valid file name.</p> <p>In most cases, you need to specify one or more IA Values to create a file name that is unique for each file that is exported, so you do not overwrite existing files.</p> <ul style="list-style-type: none"> <li>• <b>Attributes:</b> String, Input, NoTrigger</li> <li>• <b>Level&lt;n&gt;:</b> &lt;n&gt; = 0-7</li> </ul>
<Level<n>_Processed>	<p>Setting this value to &lt;1&gt; indicates that this node has already been processed, and can be skipped if configured to do so in setup.</p> <ul style="list-style-type: none"> <li>• <b>Attributes:</b> Long, Input, NoTrigger</li> <li>• <b>Level&lt;n&gt;:</b> &lt;n&gt; = 0-7</li> </ul>

### 5.4.2.2 Output IA Values

Output IA Values include output processing variables which store data generated by the module during processing. The module does not output any files to the Intelligent Capture Server. There are no file-type output values.

**Table 5-17: Output IA Values**

IA Value	Description
Output values describing output files	
<Level0_DocumentID>	Document ID of the stored document. <ul style="list-style-type: none"> <li>• <b>Attributes:</b> String, Output</li> <li>• <b>Level:</b> 0</li> </ul>
<Level<n>_FullPath>	The fully resolved path name after evaluating all IA Values and converting them to strings. <ul style="list-style-type: none"> <li>• <b>Attributes:</b> String, Output</li> <li>• <b>Level&lt;n&gt;:</b> &lt;n&gt; = 0-7</li> <li>• <b>Example:</b> &lt;Level3_FullPath as String,Output&gt;</li> </ul>
<Level<n>_Action>	This is an integer specifying the output result. Valid values are: <ul style="list-style-type: none"> <li>• 0: Node was not processed</li> <li>• 1: File exists and was skipped without prompting</li> <li>• 2: File exists and was overwritten without prompting</li> <li>• 3: File exists and an error occurred</li> <li>• 4: New file created</li> <li>• 4097: File exists, operator was prompted, and chose skip</li> <li>• 4098: File exists, operator was prompted, and chose overwrite</li> <li>• 4099: File exists, operator was prompted, and chose to log an error.</li> </ul> Attributes are: <ul style="list-style-type: none"> <li>• <b>Attributes:</b> Long, Output</li> <li>• <b>Level&lt;n&gt;:</b> &lt;n&gt; = 0-7</li> <li>• <b>Example:</b> &lt;Level3_Action as Long,Output&gt;</li> </ul>
Output status and error variables	

IA Value	Description
<ErrorNumber>	<p>The error number of the error, if any, that occurred while processing this task.</p> <ul style="list-style-type: none"> <li>• <b>Attributes:</b> Long, Output</li> <li>• <b>Level:</b> T</li> </ul>
<ErrorText>	<p>The text string of the error, if any, that occurred while processing this page.</p> <ul style="list-style-type: none"> <li>• <b>Attributes:</b> String, Output</li> <li>• <b>Level:</b> T</li> </ul>
<ExportResult>	<p>If all documents contained by the task were exported successfully, then this variable is set to zero. Otherwise, this variable contains a negative number indicating the error.</p> <p>You can check this variable in a <b>Finish</b> event handler after export to determine whether any documents require another export. To determine which documents require re-exporting, check the &lt;Level&lt;n&gt;_ErrorNumber&gt; and &lt;Level&lt;n&gt;_ErrorText&gt; IA Values for the node where the error occurred.</p> <ul style="list-style-type: none"> <li>• <b>Attributes:</b> Long, Output</li> <li>• <b>Level:</b> T</li> </ul>
<Level<n>_ErrorNumber>	<p>The error number of the error, if any, that occurred while processing this task.</p> <ul style="list-style-type: none"> <li>• <b>Attributes:</b> Long, Output</li> <li>• <b>Level&lt;n&gt;:</b> &lt;n&gt; = 0-7</li> <li>• <b>Example:</b> &lt;Level2_ErrorNumber As Long,Output&gt;</li> </ul>
<Level<n>_ErrorText>	<p>The text string of the error, if any, that occurred while processing this page.</p> <ul style="list-style-type: none"> <li>• <b>Attributes:</b> String, Output</li> <li>• <b>Level&lt;n&gt;:</b> &lt;n&gt; = 0-7</li> <li>• <b>Example:</b> &lt;Level3_ErrorText As String,Output&gt;</li> </ul>
<Level<n>_Processed>	<p>A value that is set to 1 when the level 0 nodes of the task have all been processed.</p> <ul style="list-style-type: none"> <li>• <b>Attributes:</b> Long, Output</li> <li>• <b>Level&lt;n&gt;:</b> &lt;n&gt; = 0-7</li> <li>• <b>Example:</b> &lt;Level6_Processed As Long,Input,Output,NoTrigger&gt;</li> </ul>
Output statistical variables	

IA Value	Description
<StartTime>	<p>The time at which processing on the current task began. This value is in the format of the client system's long time format.</p> <ul style="list-style-type: none"> <li>• <b>Attributes:</b> String, Output</li> <li>• <b>Level:</b> T</li> </ul>
<StartDate>	<p>The date on which processing on the current task began. This value is in the short date format of the client system.</p> <ul style="list-style-type: none"> <li>• <b>Attributes:</b> String, Output</li> <li>• <b>Level:</b> T</li> </ul>
<EndTime>	<p>The time at which processing on the current task completed. This value is in the long time format of the client system.</p> <ul style="list-style-type: none"> <li>• <b>Attributes:</b> String, Output</li> <li>• <b>Level:</b> T</li> </ul>
<EndDate>	<p>The data on which processing on the current task completed. This value is in the short date format of the client system.</p> <ul style="list-style-type: none"> <li>• <b>Attributes:</b> String, Output</li> <li>• <b>Level:</b> T</li> </ul>
<TotalTime>	<p>Total processing time of the current task in milliseconds.</p> <ul style="list-style-type: none"> <li>• <b>Attributes:</b> Long, Output</li> <li>• <b>Level:</b> T</li> </ul>
<Level<n>_StartTime>	<p>The time at which processing on the current page began. This value is in the format of the client system's long time format.</p> <ul style="list-style-type: none"> <li>• <b>Attributes:</b> String, Output</li> <li>• <b>Level&lt;n&gt;:</b> &lt;n&gt; = 0-7</li> <li>• <b>Example:</b> &lt;Level7_StartTime as String,Output&gt;</li> </ul>
<Level<n>_StartDate>	<p>The date on which processing on the current page began. This value is in the short date format of the client system.</p> <ul style="list-style-type: none"> <li>• <b>Attributes:</b> String, Output</li> <li>• <b>Level&lt;n&gt;:</b> &lt;n&gt; = 0-7</li> <li>• <b>Example:</b> &lt;Level5_StartDate as String,Output&gt;</li> </ul>

IA Value	Description
<Level<n>_EndTime>	<p>The time at which processing on the current page completed. This value is in the long time format of the client system.</p> <ul style="list-style-type: none"> <li>• <b>Attributes:</b> String, Output</li> <li>• <b>Level&lt;n&gt;:</b> &lt;n&gt; = 0-7</li> <li>• <b>Example:</b> &lt;Level5_EndTime as String,Output&gt;</li> </ul>
<Level<n>_EndDate>	<p>The date on which processing on the current page completed. This value is in the short date format of the client system.</p> <ul style="list-style-type: none"> <li>• <b>Attributes:</b> String, Output</li> <li>• <b>Level&lt;n&gt;:</b> &lt;n&gt; = 0-7</li> <li>• <b>Example:</b> &lt;Level6_EndDate as String,Output&gt;</li> </ul>
<Level<n>_TotalTime>	<p>Total processing time of the current page in milliseconds.</p> <ul style="list-style-type: none"> <li>• <b>Attributes:</b> Long, Output</li> <li>• <b>Level&lt;n&gt;:</b> &lt;n&gt; = 0-7</li> <li>• <b>Example:</b> &lt;Level6_Totalltime as Long,Output&gt;</li> </ul>
<Operator>	<p>The user name of the operator who is logged in to the module.</p> <ul style="list-style-type: none"> <li>• <b>Attributes:</b> String, Output</li> <li>• <b>Level:</b> T</li> </ul>

## Chapter 6

# FileNet Panagon IS/CS Export

This section includes the Intelligent Capture specialized enterprise export module: **ecpcore-cxp**.

For information about common features and functionalities in the Intelligent Capture client modules, see *OpenText Intelligent Capture - Module Reference (ECPCORE-CMD)*.



**Note:** IBM no longer supports FileNet Content Services. As a result, the FileNet Panagon IS/CS Export module no longer supports exporting to the CS system. Note that CS options are temporarily still available in the user interface and documentation but is no longer supported.

FileNet Panagon IS/CS Export commits *TIFF* images or *PDF* files as FileNet documents. When a document is committed, the FileNet system assigns it a document class, a unique document ID number, and index fields. Once a document is stored, access it on demand or process it with the FileNet system. Additionally, this module can populate the FileNet system with batch information such as tree structures, documents, and *IA* Values.

## 6.1 Features

FileNet Panagon IS/CS Export features:

---

### Exports images and index data into FileNet Panagon Image Services storage server

In *IS* mode, FileNet Panagon IS/CS Export commits (stores) single- or multi-page images and index values as FileNet documents.

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### Exports images and index data into FileNet Panagon Content Services storage server

In *CS* mode, FileNet Panagon IS/CS Export commits single- or multi-page images and property values as FileNet documents.

---

### Exports specified levels of the tree

Enables grouping pages of a batch at a specific tree level; for example, grouping all level 1 pages as a single document.

---

### Exports document classes

FileNet Panagon IS/CS Export can commit documents to a specified document class in the FileNet system.

---

### Enables batch commit parameters for faster processing

This module enables asynchronous batch committal queue FileNet Panagon Image Services documents for later committal, and to specify the number of documents to commit at a time. Committing a high number of documents per FileNet batch yields faster processing.

---

### Logs batch committal progress and DocID retrieval success

Writes values (TRUE or FALSE) to a log file indicating whether the batch was committed to the FileNet system. This log also indicates whether the last DocID retrieval was successful or not.

---



**Note:** IBM FileNet Panagon Image Services uses the term “index field”, while IBM FileNet Panagon Content Services uses the term “property field”. Both these fields describe data stored together with images to facilitate later search and retrieval. These terms are interchangeable; however, the term “index field” is used throughout this guide.

## 6.2 Setting Up FileNet Panagon IS/CS Export

Most configuration information for Intelligent Capture client modules is defined during *module setup*. You can run a module in setup mode from Intelligent Capture Designer, from Intelligent Capture Administrator, or from a command prompt with appropriate arguments. For more information, see *OpenText Intelligent Capture - Module Reference (ECPCORE-CMD)*.

When launched in setup mode, a client module displays the **Setup** window in which you can specify the module’s configuration settings.

This section contains the following topics to help you design the module for inclusion in a workflow:

### 6.2.1 Starting the FileNet Capture Manager

Before starting FileNet Panagon IS/CS Export to use with an *IS* repository, run the FileNet Capture Manager. The FileNet documentation contains instructions for running the Capture Manager. Once the Capture Manager is run, proceed to run the FileNet Panagon IS/CS Export module in production mode.

### 6.2.2 Setting Up FileNet Panagon Image Services

Be sure that the workstation is running the version of Windows recommended in the FileNet documentation and *Intelligent Capture Release Notes* (available in My Support (<https://support.opentext.com/>)), including all applicable service packs and patches. The *Release Notes* contains information on supported versions of the FileNet Panagon Image Services application.

#### To export to FileNet Panagon Image Services (IS):

1. Configure the FileNet server system by installing a compatible version of FileNet IDM IS with Batch Entry Services (*BES*) according to the instructions and guidelines in the FileNet installation documentation.
2. Ensure that the computers running FileNet Panagon IS/CS Export, the Intelligent Capture Server, and the FileNet server can communicate with one another.



**Note:** Use the *Release Notes* and the *Capture Dependencies* documents available on the FileNet *CS* website for specific requirements. This site requires a FileNet User Name and Password, which you can obtain by selecting the **new logon and password** link on the page and then supplying the information requested.

### 6.2.3 Setting Up FileNet Panagon Content Services



**Note:** IBM no longer supports FileNet Content Services. As a result, the FileNet Panagon IS/CS Export module no longer supports exporting to the CS system. Note that CS options are temporarily still available in the user interface and documentation but is no longer supported.

When exporting to FileNet Panagon Content Services, each document exported must be associated with a single file. This means that if the export level is set to a level greater than the page level. The pages must be combined into a single file using a module before export. The file is sent to the module using the `<Level<n>_InputFile> IA Value`.

Be sure that the workstation is running the version of Windows recommended in the FileNet documentation and *Release Notes*, including all applicable service packs and patches. The *Release Notes* contains information on supported versions of the FileNet Panagon Content Services application.

#### To export to FileNet Panagon Content Services (CS):

1. Install FileNet Panagon IDM Desktop.
2. Configure the FileNet server system by installing a compatible version of FileNet Panagon Content Services. Be sure that the FileNet server is running the version of Windows recommended in the FileNet documentation, including all applicable service packs and patches.
3. Ensure that the computers running FileNet Panagon IS/CS Export, the Intelligent Capture Server, and the FileNet server can communicate with each other.



**Note:** FileNet Panagon Image Services uses the term “index field” while FileNet Panagon Content Services uses the term “property field”. As used within FileNet Panagon IS/CS Export, these terms are identical. They both describe data you store together with your images to facilitate later search and retrieval. This guide uses the term “index fields”.

#### Related Topic

[“Setting Up FileNet Panagon Image Services” on page 154](#)


## 6.2.4 Replacing FileNet ISMIS Export with FileNet Panagon IS/CS Export

This module has a different executable name than the FileNet ISMIS Export module it replaces. If you have been using the previous version of the module to process batches, you can continue to do so.

However, if you want to upgrade to the new FileNet Panagon IS/CS Export module, update your *IPP*.

### To update your IPP to upgrade to the new FileNet Panagon IS/CS Export module:

1. Include `iaxfnet2.mdf` instead of `iaexfnet.mdf`.
2. Change the *MDF* referenced by the `<Instance>` declaration from `<IAEXFNET(<n>)>` to `<IAXFNET2(<n>)>`.
3. Recompile and install your new process.
4. Create and process new batches based on the new process.


 **Note:** IA Values used by the previous version of the module are identical to IA Values used by this version.

## 6.2.5 Logging in to the FileNet Panagon Server

Unless you start the module with a command line or specially prepared icon that specifies the `-loginex` parameter, log in to the FileNet Panagon Server before setting up or running the module:

### To log in to the FileNet Panagon Server:

1. Run the module for setup, or run the module for production. The **FileNet - Logon** window is displayed.
2. Supply your FileNet **User name**, **Password**, and the **FileNet Repository**.
3. Select either *IS* or *CS*, depending on whether you are processing tasks for FileNet Panagon Image Services (IS) or FileNet Panagon Content Services (CS).
4. Click **OK** to start the module.

 **Note:** Each time you start the FileNet Panagon IS/CS Export module, select whether you are exporting to an *IS* or *CS* system. After logging in to one of these modes, the module can only export to a FileNet Panagon repository of the selected type. If the module receives a task intended for the other system, it will generate an error. The way in which this error is handled depends on how the batch was set up.

## Related Topics

[“Setting Up FileNet Panagon Image Services” on page 154](#)

[“Setting Up FileNet Panagon Content Services” on page 155](#)

## 6.2.6 Defining Export Options

The **FileNet Export Setup** window enables you to define export level and document level definitions, specify document classes and index (*IS*) or property (*CS*) fields, and specify batch commit parameters (*IS* only).

### 6.2.6.1 Specifying Export and Document Levels

Export and document levels set the trigger for sending documents to the server, and the level at which pages are grouped during export.

#### To specify the export and document levels:

1. Run the FileNet Panagon IS/CS Export module in setup mode. The **FileNet Export Setup** window displays.
2. The **Export (Trigger) Level** shows the trigger level defined in your *IPP*. You can accept this value or type in a new one to set the level at which your documents are sent to the FileNet system.
3. The **Document Level** list box displays the level at which images are grouped as documents to be exported into the FileNet system. Select the Document Level from the **Document Level** list box.



**Note:** The **Document Level** must be the equal to or less than the **Export (Trigger) Level**. The Document Level you specify must contain pages. If it does not, no document is exported to the FileNet system.

4. Click **OK** and your settings are saved.

## Related Topics

[“Specifying Document Classes and Index or Property Fields” on page 158](#)


[“Specifying Batch Commit Parameters \(IS only\)” on page 159](#)

### 6.2.6.2 Specifying Document Classes and Index or Property Fields


To export a document to the FileNet system, select an administrator-created document class, a category used to identify a group of related documents such as loan documents or invoice documents. Each document class also contains a set of index fields (property fields in the *CS* system) that are categories of information such as “Name” and “Social Security Number” that help to identify documents.

#### To specify the document class and index or property fields:

1. Run the FileNet Panagon IS/CS Export module in setup mode. The **FileNet Export Setup** window displays.
2. Select the document class from the **Document Class** list box.

 **Note:** Whenever you select a new document class, the list of index fields changes and any mappings you have made are cleared. Therefore, after you have started mapping index strings to index fields, do not change the document class unless you want to clear all existing mappings.

3. The **Property Fields** column displays a list of index or property fields for that document class. Select an index field from the list box.
4. In the **Index String** field, supply a value to map to the selected index field. You can:
  - Type a static value consisting of printable *ASCII* characters in the Index Stringfield; for example, 25 or Monday. This value is used for each task the module processes.
  - Type the name of an IA Value; for example, <@(Scan.Date)>. If you map an index field to an IA Value, the module converts it to actual data at export time.
  - Select **Insert Value** to display the **Choose Value** window, from which you can select the IA Value.

 **Note:** While specifying each index string, note the **Index Type** and, for String types, the **MaxLength** information that displays above the **Index String** field. Be sure that the index string you specify matches the requirements for the selected index field.

**FileNet Menu Index** type is a special case. Map this type to the appropriate single ASCII character that has been set up in the FileNet system as the return code for a menu item. Do not map a **Menu Index** type to the menu item string.

If there are required index fields that have not been mapped to index strings, the FileNet Panagon IS/CS Export module displays an error message when you click **OK**.

5. Click **OK** and your settings are saved.

## Related Topics

“Specifying Export and Document Levels” on page 157

“Specifying Batch Commit Parameters (IS only)” on page 159

### 6.2.6.3 Specifying Batch Commit Parameters (IS only)

If you are exporting documents to a FileNet Panagon Image Services (IS) system, you can specify batch commit parameters to enable more efficient and faster export operations. Including:

- Use asynchronous versus synchronous mode for batch committal.
- Specify the number of documents per FileNet batch.
- Specify the export of local versus server-based documents.

#### To specify the Batch Commit parameters (IS only) options:

1. Run the FileNet Panagon IS/CS Export module in setup mode. The **FileNet Export Setup** window displays.
2. Select the **Asynchronous** check box to queue documents for later committal to the Image Services system. Clear the **Asynchronous** check box to commit documents synchronously, which is slower but ensures that the module receives all error messages.



**Note:** Using asynchronous batch committal, the FileNet Panagon IS/CS Export module can continue to process tasks even if the Image Services system is busy or unavailable. With synchronous batch committal, the export module waits until all documents are committed to the Image Services system before it begins to process the next task.

3. Type the number of documents per FileNet batch in the **Documents Per FileNet Batch** field, which enables you to make the most efficient use of the FileNet system. Many documents per FileNet batch yields faster processing, but requires more system memory.



**Note:** If you experience runtime errors from the FileNet Panagon IS/CS Export module due to insufficient memory, try setting **Documents Per FileNet Batch** to a smaller number.

4. Select the **Log Commit Result** check box to write values (true or false) to a log file named `iaexportlog.log`. FileNet Panagon IS/CS Export writes to the log only if the batch was successfully committed to the FileNet system. This log file is saved under the same directory as the FileNet export executable and includes both the FileNet batch name and the IA batch name.
5. Select the **Retrieve Last Document ID Test** check box to write a log file named `iaexportlog.log`. FileNet Panagon IS/CS Export writes to the log only if the last DocID retrieval was successful. This log file is saved under the same directory as the FileNet export executable and includes the last DocID.

6. Click **OK** to save the settings.

### Related Topics

[“Specifying Export and Document Levels” on page 157](#)

[“Specifying Document Classes and Index or Property Fields” on page 158](#)

## 6.2.7 Converting FileNet Error Tuples

Error codes returned in the FileNet system are in tuple format:  $\langle nnn.nnn.nnn \rangle$ , where  $\langle n \rangle$  is a digit. Tuple format represents an ordered set of  $\langle n \rangle$  values. To use these values in an *IPP*, must convert them to and from the numbers used in IA Values. Converting a tuple into an equivalent decimal value involves multiplying each segment by a fixed power of 2 and then adding the parts together. Consult FileNet documentation for information on converting between decimal and tuple formats, and to determine the error code referenced by the tuple value.

## 6.3 Running FileNet Panagon IS/CS Export in Production

After the module has been set up, tested, and placed in a production environment, operators and administrators will run the module in production.

For information related to common production tasks for unattended modules, see *Running a Module for Production* in the *OpenText Intelligent Capture - Module Reference (ECPCORE-CMD)* guide.



**Note:** The *Running Modules in Production Mode* section contains production topics that are common to many unattended modules and may not apply to this module.

## 6.4 Reference—FileNet Panagon IS/CS Export

The topics within this section contain reference information useful while using the application in setup or production.


## 6.4.1 Windows


The topics within this section provide descriptions of windows accessible from the application. The topics list the user interface element name and include a brief description of actions available from the window.

### 6.4.1.1 Error Handling Setup

To display the **Error Handling Setup** window, click **Error Handling** from the **FileNet Export Setup** window. The window contains the following options:

**Table 6-1: Error Handling Setup Window**

Element	Description
If document has already been exported	<ul style="list-style-type: none"> <li>• <i>Skip</i>: do not reexport document</li> <li>• <i>Replace</i>: export document again</li> </ul> <p> <b>Note:</b> When you retrigger the batch, the new document will be created in FileNet IS and the document to be replaced will be preserved in FileNet IS system in an active state.</p>
When An Error Occurs	Select <b>Automatically Retry</b> if you want the module to automatically retry that failed operation before returning an error code. In the <b>times if applicable</b> field, type the number of times to retry the operation.

Element	Description
<p>If Retrying Fails Or Does Not Apply</p>	<ul style="list-style-type: none"> <li>• <b>Abort the current task and keep accepting tasks:</b> Aborts the current task with an &lt;ExportResult&gt; IA Value that indicates an error occurred so that processing instructions in the <i>IPP</i> can cause the appropriate action to be taken. The module can then continue processing other tasks. With this option, the error window does not display. The only way to determine that an error might have occurred is to check the &lt;Error&gt; IA Value in the <i>IPP.s Finish</i> event handler.</li> <li>• <b>Abort the current task then stop accepting tasks:</b> Aborts the current task with an &lt;ExportResult&gt; IA Value that indicates an error occurred so that processing instructions in the <i>IPP.s Finish</i> event handler can cause the appropriate action to be taken. The module stops accepting tasks after aborting the task which generated an error.</li> <li>• <b>Continue current task and keep accepting tasks:</b> Errors are logged, but processing on the current task and future tasks continues.</li> <li>• <b>Continue current task, then stop accepting tasks:</b> Errors are logged, but processing on the current task continues. The module stops accepting tasks after it finishes the task which encountered the error.</li> <li>• <b>Prompt user with these options:</b> When an error occurs during processing, the <b>FileNet Export Warning</b> message box displays. The operator then must select <b>Overwrite</b> to replace the existing document or <b>Skip</b> to skip the current document and continue with the next document. Select <b>Use This Choice For All Documents In The Task</b> to use the specified option for all documents in the task that already exist on the FileNet server. If this check box is cleared, the prompt displays for every document in the task that already exists on the FileNet server.</li> </ul> <p> <b>Note:</b> Regardless of whether Overwrite or Skip is selected, if an error occurs the module always sets</p>

Element	Description
	<p>the &lt;Error&gt; IA Value to the number of the node that was being processed. Then the error is logged to the Windows Event log on the computer running the Intelligent Capture Server. If any error was encountered during export, then the &lt;ExportResult&gt; value is set at the highest level for the task. &lt;ExportResult&gt; contains the error code if an error occurred. If an error did not occur, it contains zero.</p>

### 6.4.1.2 FileNet Export

The FileNet Export window is where you launch batches during production>

**Table 6-2: FileNet Export Window**

Element	Description
<b>File</b> menu	The <b>File</b> menu enables you to open and process batches, and open sessions for those batches.
<b>Run</b> menu	The <b>Run</b> menu enables you to run all available batches or a single selected batch.
<b>View</b> menu	The <b>View</b> menu provides options for manipulating the image.
<b>Help</b> menu	Provides access to the help system where you can find information to guide you while working in the module.
<b>Run All Batches</b>	Run All Batches mode is a Wait for Task mode (a mode in which you can only process batches that are queued on the Intelligent Capture Server for the module). In Run All Batches mode, the module receives any queued tasks from any open batch as the tasks become available from the Intelligent CaptureServer.
<b>Run Single Batch</b>	Run Single Batch mode is a Wait for Task mode. In Run Single Batch mode, you choose a single queued batch to process.
<b>Open Batch</b>	Opens a batch for processing in Open Batch mode.
<b>Export</b>	Processes the open batch.

Element	Description
Stop	Cancel processing of the current task and stop accepting tasks from the Intelligent Capture Server.
View tab	Displays viewing options.

#### 6.4.1.2.1 File Menu

The **File** menu of the **FileNet Export (production)** window contains the following elements.

**Table 6-3: File Menu**

Element	Description
Open Batch	Opens a batch for processing in Open Batch mode.
Close Batch	Closes an open batch.
Set Up Instance	Displays the <b>FileNet Export Setup</b> window, allowing you to specify custom settings for the Open Batch.
Export	Processes the open batch.
Print	Prints the currently selected page.
Exit	Exits the FileNet Panagon IS/CS Export module.

#### 6.4.1.2.2 Run Menu

The **Run** menu of the **FileNet Export (production)** window contains the following elements.

**Table 6-4: Run Menu**

Element	Description
All Batches	Run All Batches mode is a Wait for Task mode (a mode in which you can only process batches that are queued on the Intelligent Capture Server for the module). In Run All Batches mode, the module receives any queued tasks from any open batch as the tasks become available from the Intelligent CaptureServer.
Single Batch	Run Single Batch mode is a Wait for Task mode. In Run Single Batch mode, you choose a single queued batch to process.


Element	Description
Stop	Cancel processing of the current task and stop accepting tasks from the Intelligent Capture Server.

### 6.4.1.2.3 View Menu

The **View** menu of the **FileNet Export (production)** window contains the following elements.

**Table 6-5: View Menu**

Element	Description
Refresh	Updates the tree so that it reflects any changes to the tree structure.
Next Page	Displays the next image if more than one image is loaded.
Previous Page	Displays the previous image if more than one image is loaded.
Go to Page	Enables you to select which page to display if more than one image is loaded.
Fit to Window	Scales an image to fit into the <b>Image</b> pane. If you change the window size, then the image size scales accordingly.
Fit to Width	Scales an image to fit the width of the <b>Image</b> pane. If you change the window size, then the image width changes accordingly.
Scale 1 to 1	Displays one pixel of the image for each pixel in the <b>Image</b> pane. If you change the window size, then the image scale does not change.
Zoom In	Zooms in on the image by the designated zoom factor (default 10).
Zoom Out	Zooms away from the image by the designated zoom factor (default 10).
Change Zoom Factor	Changes the default zoom factor (10) to the number you specify.

Element	Description
<b>Orientation</b>	<p>Changes the orientation of images. Generally only applicable when running the module in Open Batch mode because this is the only mode that enables an operator to manipulate pages before exporting. Select one of the following options from the <b>Orientation</b> menu:</p> <ul style="list-style-type: none"> <li>• 0 Degrees (Portrait) Default orientation.</li> <li>• 90 Degrees (Landscape)</li> <li>• 180 Degrees</li> <li>• 270 Degrees</li> </ul> <p>Applies to current page or all pages in the tree pane depending on <b>Apply Settings To All Pages</b> check box.</p> <p> <b>Note:</b> Changing the view orientation does not affect the orientation of the output image unless the <b>Use Current Orientation</b> check box was selected during module step or Open Batch setup.</p>
<b>Scale to Gray</b>	<p>Displays images smaller than a 1:1 image size by representing the average density of missing pixels with a shade of gray, making images more readable. If you do not select this option, then the module hides some pixels when an image is reduced. For example, when an image is displayed at 25% of its actual size, only one pixel out of 16 is visible. The remaining pixels are disregarded and the resulting image may be unreadable.</p>
<b>Invert</b>	<p>Inverts the image in the <b>Image</b> pane, replacing white pixels with black and black pixels with white.</p>
<b>Apply Settings to All Pages</b>	<p>Applies viewing options to all loaded images.</p>
<b>Control Panel</b>	<p>Displays or hides the control panel on the left side of the window.</p>
<b>Status Bar</b>	<p>Displays or hides the status bar at the bottom of the window.</p>

Element	Description
<b>Tree Preferences</b>	Makes several changes to the tree appearance, including: <ul style="list-style-type: none"> <li>• Changes the color of the background, lines, all level name text or a single selected text, and all thumbnail image text or a single selected thumbnail image text.</li> <li>• Changes the font of the tree text.</li> <li>• Pairs the fronts with the backs of images if you scanned two-sided pages.</li> </ul>
<b>Save Preferences Now</b>	Immediately saves the changes you made to the tree preferences.
<b>Save Preferences on Exit</b>	Saves the changes you made to the tree preferences when you exit.

#### 6.4.1.2.4 View tab

This table explains the options available from the FileNet Export module **View** tab of the production mode control panel.

**Table 6-6: View tab**

Element	Description
<b>Fit to Window</b>	Scales an image to fit into the window. If you change the window size, the image size scales accordingly.
<b>Fit to Width</b>	Scales an image to fit the width of the window. If you change the window size, the image width changes accordingly.
<b>1 to 1</b>	Displays one pixel of the image for each pixel in the window. If you change the window size, the image scale does not change.
<b>Zoom In</b>	Zooms in on the image by the designated zoom factor (default 10). To change the zoom factor, select the <b>Change Zoom Factor</b> option.
<b>Zoom Out</b>	Zooms away from the image by the designated zoom factor (default 10). To change the zoom factor, select the <b>Change Zoom Factor</b> option.


Element	Description
Orientation	<p>Displays the image in the image window at one of the following orientations:</p> <ul style="list-style-type: none"> <li>• 0 degrees (portrait position)</li> <li>• 90 degrees (landscape position)</li> <li>• 180 degrees</li> <li>• 270 degrees</li> </ul>
Scale to Gray	<p>Displays images smaller than a 1:1 image size by representing the average density of missing pixels with a shade of gray, making images more readable. If you do not select this option, the module hides some pixels when an image is reduced. For example, when an image is displayed at 25% of its actual size, only one pixel out of four is visible. The remaining pixels are disregarded and the resulting image may be unreadable.</p>
Invert	<p>Inverts the image, replacing white pixels with black and black pixels with white.</p>

### 6.4.1.3 FileNet Export Setup

Run the FileNet Panagon IS/CS Export module in setup mode. The following settings are available in this window:

**Table 6-7: FileNet Export Setup window**

Element	Description
Export (Trigger) Level	<p>Displays the export module's trigger level defined in your <i>IPP</i>. The <b>Export (Trigger) Level</b> is the level at which your documents are sent to the FileNet system.</p>

Element	Description
<b>Document Level</b>	<p>Displays the level at which images are grouped as documents to be exported into the FileNet system. For example, a <b>Document Level</b> of 1 indicates that each level 1 node in the tree is exported as a single document which contains all pages within a single level 1 node. If the <b>Document Level</b> is 0, each page is exported as a separate document.</p> <p> <b>Note:</b> The <b>Document Level</b> must be the equal to or less than the <b>Export (Trigger) Level</b>. The Document Level you specify must contain pages. If it does not, no document is exported to the FileNet system.</p>
<b>IDM IS</b>	Indicates that you are logged on to an <i>IS</i> FileNet server.
<b>IDM CS</b>	Indicates that you are logged on to a <i>CS</i> FileNet server.
<b>Document Class</b>	Used to identify a group of related documents, such as loan documents or invoice documents. Using document classes helps to simplify future document retrieval. Your FileNet administrator creates appropriate classes for the types of documents you want to store. When you select a <b>Document Class</b> , the <b>Index Fields</b> list box is updated with index or property fields for the selected class.

Element	Description
<p><b>Batch Commit Parameters (IS only)</b></p>	<p>These control the rate of document processing on <i>IS</i> systems. The available options are:</p> <ul style="list-style-type: none"> <li>• <b>Asynchronous:</b> Queues documents for later committal. Asynchronous batch committal is faster and more efficient, but errors may occur that cannot be reported to the export module. Clear the check box to commit documents synchronously. During synchronous batch committal, the FileNet Panagon IS/CS Export module waits until each document is fully committed to the Image Services system before continuing to process tasks. Synchronous mode is slower but it is the only way to ensure that the module receives all error messages.</li> <li>• <b>Documents per FileNet batch:</b> Specifies the number of documents to commit at one time. Committing a high number of documents per FileNet batch yields faster processing, but causes the FileNet Panagon IS/CS Export module to use more memory.</li> <li>• <b>Log Commit Result only –</b> FileNet Panagon IS/CS Export writes values (true or false) to a log file named <code>iaexportlog.log</code> only if the batch was successfully committed to the FileNet system. This log file is saved under the same directory as the FileNet export executable and includes both the FileNet batch name and the IA batch name.</li> <li>• <b>Retrieve Last Document ID Test –</b> FileNet Panagon IS/CS Export writes to a log file named <code>iaexportlog.log</code> only if the last DocID retrieval was successful. This log file is saved under the same directory as the FileNet export executable and includes the last DocID.</li> </ul>
<p><b>File Type</b></p>	<p>Select the file type you are going to export:</p> <ul style="list-style-type: none"> <li>• <code>.tif</code> – Tagged image file format</li> <li>• <code>.pdf</code> – Portable document format</li> </ul>

Element	Description
<p><b>Property Fields</b></p>	<p>When you choose a <b>Document Class</b>, the <b>Index Fields</b> column displays a list of index or property fields for that document class. Any mappings you make between index fields and index strings appear in the <b>Index String</b> column.</p> <p>Select each of the index fields for the selected document class and note the ones that display <b>(Required)</b> in the informational area above the <b>Insert Value</b> button. Required fields must be mapped to an index string. Index fields that display <b>(Not Required)</b> can be mapped to index strings.</p> <p>Each document class contains a set of index fields (property fields in the CS system) defined by the FileNet administrator. Index fields are categories of information such as “Name” or “Telephone Number” that help to uniquely identify an item. This information enables you to retrieve a document in the FileNet system by searching for the name or telephone number.</p>
<p><b>Index String</b></p>	<p>Select each of the index fields for the selected document class and note the ones that display <b>(Required)</b> in the informational area above the <b>Insert Value</b> button in the lower right corner of the setup window. Required fields must be mapped to an index string. Index fields that display <b>(Not Required)</b> can be mapped to index strings. Type the format string to use for filling in the associated attribute, or use the <b>Insert Value</b> button to select from a list of values</p>
<p><b>Insert Value</b></p>	<p>For inserting an IA Value in the <b>Index String</b>.</p>
<p><b>Error Handling</b></p>	<p>Displays the <b>Error Handling Setup</b> window.</p>

### Related Topic

*“Defining Export Options” on page 157*

### 6.4.1.4 FileNet Logon

Each time you start the FileNet Panagon IS/CS Export module, select whether you are exporting to an IS or CS system. After logging in to one of these modes, the module can only export to a FileNet Panagon system of the selected type. If the module receives a task intended for the other system, it generates an error. The way in which this error is handled depends on how the batch was set up.

**Table 6-8: FileNet Panagon IS/CS Export log in screen**

Element	Description
User name	Type your FileNet login name.
Password	Type your FileNet password.
FileNet Repository	<ul style="list-style-type: none"> <li>• If you will be processing tasks for FileNet Panagon Image Services, type the name of the FileNet Repository to which you want pages to be exported.</li> <li>• If you will be processing tasks for FileNet Panagon Content Services, type the name of the CS server computer.</li> </ul>
IS or CS	<ul style="list-style-type: none"> <li>• Select <i>IS</i> if you will be processing and exporting pages into a FileNet Panagon Image Services system.</li> <li>• Select <i>CS</i> if you will be processing and exporting pages into a FileNet Panagon Content Services system.</li> </ul>

#### Related Topic

[“Logging in to the FileNet Panagon Server” on page 156](#)


## 6.4.2 IA Values

The topics in this section describe IA values that can be used with this application.

### 6.4.2.1 Input IA Values

The following two input values are trigger variables. After each variable is set to a non-zero value, the Intelligent Capture Server sends tasks to a running FileNet Panagon IS/CS Export machine.

**Table 6-9: Input IA Values**


IA Value	Description
<Level<n>_InputFile>	<p>The input <i>PDF</i> file for the task on the Intelligent Capture Server at the specified level, n.</p> <ul style="list-style-type: none"> <li>• <i>Attributes:</i> File, Input, Trigger</li> </ul> <p> <b>Note:</b> When exporting to FileNet Panagon CS, each document exported must be associated with a single file. This means that if the export level is set to a level greater than the page level. The pages must be combined into a single file using a module before FileNet IS/CS. The file is sent to the module using the &lt;Leveln_InputFile&gt;.</p>
<InputImage>	<p>File name of the task's input <i>TIFF</i> image on the Intelligent Capture Server. This may be a single-page or multi-page TIFF file.</p> <ul style="list-style-type: none"> <li>• <i>Attributes:</i> File, Input, Trigger</li> </ul>

### 6.4.2.2 Output IA Values

The following table describes the Output *IA* Values that you can enter into a field.

**Table 6-10: Output IA Values**

IA Value	Description
<ExportResult>	<p>If all documents contained by the task were exported successfully, this value is set to 0. Otherwise, this value contains a decimal error number. To determine the FileNet error that occurred, you must convert the decimal value to a FileNet error tuple in the form &lt;nnn&gt;.&lt;nnn&gt;.&lt;nnn&gt;. Consult the FileNet documentation for information on converting between decimal and tuple format, and to determine the error code referenced by the tuple value.</p> <ul style="list-style-type: none"> <li>• <i>Attribute:</i> Long, Output</li> </ul>
<TaskTime>	<p>The amount of time, in milliseconds, spent processing the task.</p> <ul style="list-style-type: none"> <li>• <i>Attribute:</i> Long, Output</li> </ul>

IA Value	Description
<Level<n>_Error>	<p>If the document was exported successfully, this value is set to 0. Otherwise this value contains a non-zero number that indicates the error. This value applies to the document at level &lt;n&gt;, where &lt;n&gt; is a level from 0 to 7.</p> <ul style="list-style-type: none"> <li>• <i>Attribute:</i> Long, Output</li> </ul>
<Level<n>_DocumentNumber>	<p>The FileNet document ID for a document that has been successfully exported. This variable applies to the document at level &lt;n&gt;, where &lt;n&gt; is a level from 0 to 7.</p> <ul style="list-style-type: none"> <li>• <i>Attribute:</i> Long, Output</li> </ul>
<Level<n>_DocumentNumberStr>	<p>The FileNet document ID that exceeds the maximum value of (2147483647) for a document that has been successfully exported. This variable applies to the document at level &lt;n&gt;, where &lt;n&gt; is a level from 0 to 7.</p> <ul style="list-style-type: none"> <li>• <i>Attribute:</i> Long, Output</li> </ul> <p> <b>Note:</b> If the document ID exceeds the maximum value (2147483647), then only the &lt;Level&lt;n&gt;_DocumentNumberStr&gt; IAValue is set. In all other scenarios, both &lt;Level&lt;n&gt;_DocumentNumberStr&gt; and &lt;Level&lt;n&gt;_DocumentNumber&gt; are set.</p>
<Level<n>_TotalTime>	<p>The amount of time, in milliseconds, to export the entire level &lt;n&gt; document, where &lt;n&gt; is a level from 0 to 7.</p> <ul style="list-style-type: none"> <li>• <i>Attribute:</i> Long, Output</li> </ul>
<Level<n>_CommitTime>	<p>The amount of time, in milliseconds, of the FileNet commit action for the document at level &lt;n&gt;, where &lt;n&gt; is a level from 0 to 7.</p> <ul style="list-style-type: none"> <li>• <i>Attribute:</i> Long, Output</li> </ul>

## Chapter 7

# Global 360 Export

This section includes the Intelligent Capture specialized enterprise export module: **ecpcore-cxe**.

For information about common features and functionalities in the Intelligent Capture client modules, see *OpenText Intelligent Capture - Module Reference (ECPCORE-CMD)*.

The Global 360 Export module exports image data and index data into a Global 360 Execute360 server. The Global 360 Execute360 server is also called Execute360 server. For the latest supported versions of Execute360, see the *Intelligent Capture Release Notes* (available in My Support (<https://support.opentext.com/>)).

The Global 360 Export module organizes captured documents into a tree structure for storage on the Execute360 server. The module defines a class for each exported work item, which then determines the index data to insert for the work item. The Global 360 Export module also searches for existing work items to which pages, documents, and folders can be added. Images are exported to the Execute360 server as *TIFF* files.

## 7.1 Features

Global 360 Export module features include:

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### Organizes folders and documents into work items

Documents are organized into work items, which define a tree structure that consists of up to eight hierarchical levels. Each level is called a work item. A work item can either be a folder which holds one or more work items, or a document which contains one or more pages. During export, the export module creates and organizes all work items as folders except at the lowest level, which becomes the document. Use IA Values to generate work item names based on data captured during processing.



**Note:** When work items are exported at a level higher than the trigger level, only work items at or below the trigger level are routed through Execute360. Folders are created for levels exported above the trigger level, but the folders are not routed through Execute360.

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### Defines classes for each work item

A class and name for each work item created above the page level in the tree can be defined during module setup. A class is a category for storing and retrieving objects, and includes a form with a named set of indexing fields. A work items class determines what index data is collected for that work item. It is the role of your administrator to create classes that reflect the business needs of your department or company. For example, an insurance company system can

include a class labeled “Appraisal”. The Appraisal class of documents includes indexing fields such as “Last Name” and “Claim Number”. The insurance company can then retrieve a particular appraisal document by searching for the name or claim number.

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**Stores index values for each work item**

Assign values to the predefined indexing fields (determined by a class form) to specify index data for each work item. Each class has a unique form with specific predefined indexing fields. For example, a class labeled “Appraisal” has a different form from a class labeled “Invoice”. You can specify one or more indexing fields for each work item created. You can manually type indexing data during module setup or capture the indexing data earlier in your process. IA Values containing indexing data are then mapped to indexing fields for the work items.

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**Enables searches over existing work items**

The search functionality enables searching for existing work items. Workitems can then be modified to add or remove pages, documents, and folders. Queries can be run against the database for existing work items by name, indexing field, or both. When the module finds an existing file that meets the search criteria, it implements specific actions according to setup instructions. For example, the module can update an existing work item by replacing indexing fields and pages or by appending images and updating only empty indexing fields. Or the module can be set up to report an error to the Windows Event Log on the Intelligent Capture Server without modifying the existing work item.



**Note:** By default, when creating work items, the module does not search for existing items to determine if duplicates exist. Instead, new folders and documents are always created regardless of whether items with the same name exist. To enable updating rather than overwriting of existing work items, see [Searching](#) tab.

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**Handles errors in the Finish event handler**

Handles errors in a Finish event handler rather than an Error event handler in the *IPP*. For information about this feature, see [“Handling Errors in a Finish Event Handler”](#) on page 183.

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## 7.2 Setting Up Global 360 Export

Most configuration information for Intelligent Capture client modules is defined during *module setup*. You can run a module in setup mode from Intelligent Capture Designer, from Intelligent Capture Administrator, or from a command prompt with appropriate arguments. For more information, see *OpenText Intelligent Capture - Module Reference (ECPCORE-CMD)*.

When launched in setup mode, a client module displays the **Setup** window in which you can specify the module’s configuration settings.

## 7.2.1 Configuring and Testing the Connection to Global 360 Execute360

Before running the Global 360 Export module, you must first obtain and install the Global 360 Execute360 client engine . The client engine contains the libraries necessary to enable the export module to run. It also and configures the client machine to connect to the Global 360 Execute360 system.

 **Note:** The Global 360 Export setup program does not automatically edit the PATH statement of the client machine. It does require the location of its *DLL* files to be in the path (for example, `c:\global360\dll`). Manually edit the client machine PATH statement to include the location of the Global 360 ExportDLL files. After editing the path and rebooting the client machine, proceed to run the module as described in the following instructions.

When you start the Global 360 Export module, you are prompted to log in to the Global 360 Export system.

### To configure and test the connection to Global 360 Execute360:

1. In the login window, type your **User name**, **Password**, and the **Domain**.
2. Click **OK**. If you can successfully log in to the system, you have established a connection.

## 7.2.2 Connecting to the Global 360 Execute360 System

Exporting from the Intelligent Capture Sserver to the Global 360 Execute360 system requires a working connection to the system.

### To connect to the Global 360 Execute360 system:

1. Run the Global 360 Export module in production mode and log in to the Intelligent Capture Server. The **Global 360 Logon** window displays.
2. Type your user name, password, and server domain name in the **Username**, **Password**, and **Domain** fields.
3. Click **OK** to run the export module. The **Global 360 Export** production window displays.

## 7.2.3 Setting Up Work Items

The Global 360 Export module organizes your documents into a tree structure that can consist of up to eight hierarchical levels. Each level is called a work item. A work item can either be a folder, which holds one or more work items, or a document, which contains one or more pages. During export, the export module creates and organizes all work items as folders except at the lowest level, which becomes the document.

### 7.2.3.1 Creating Work Items and Assigning Work Item Classes

When setting up the Global 360 Export module, create a work item for each level (above the page level) of the tree that you want to export, and then assign a class to each work item.

**To specify work items to export and assign a class to each:**

1. Run Global 360 Export in setup mode. The **Global 360 Export Setup** window displays.
2. Select the **Tree Conversion** tab in the **Setup** window.
3. Select the checkbox for each level you want to export. Each level that you select becomes a work item in the Global 360 Execute360 system. Select at least one level.



**Note:** If you export work items at a higher level than the trigger level, only work items at or below the trigger level are routed through the module. Empty folders are created for levels exported above the trigger level, but the folders are not routed through the Global 360 Export module.

4. For each enabled level, select a class from the **Class** list box.
5. Specify a name in the **Name** field by:
  - Typing a fixed name such as Travel Expenses.
  - Using a variable name by inserting an IA Value.
  - Using a naming schema to name each work item uniquely with respect to its position in the tree.
6. Repeat these steps for each level selected in the **Level** list. Provide a name for each selected level and define a class for each level you want to export above the page level in the tree.
7. Provide a name that you want for the page when it is exported in the **Page** field.



**Note:** The Global 360 Export module can process approximately 500 pages per document. This number is lower when the module runs on slow machines or a slow network connection. This limit does not include the overall batch size which can be much larger. Contact OpenText Global Technical Services at My

Support (<https://support.opentext.com>) for information to process documents with more than 500 pages or to process documents using a slow system.

## Related Topics

“Setting Up Work Items” on page 178

“Assigning Values to Work Item Indexing Fields” on page 179


“Searching for Existing Workitems” on page 180

### 7.2.3.2 Assigning Values to Work Item Indexing Fields

For each work item you create on the **Tree Conversion** tab, you can assign values to the indexing fields defined for the work items class.

#### To specify indexing field values:

1. Run Global 360 Export in setup mode. The **Global 360 Export Setup** window displays.
2. From the **Tree Conversion** tab, click the **Fields** button corresponding to the work item whose fields you want to map. The **Form Setup** window displays and the **Field to Value Mappings** list displays your current mappings.
3. Define a new mapping by selecting a field from the **Field** list box.
 

 **Note:** The constraints for the current field are displayed below the **Field** list box. These constraints are not enforced during setup but are enforced at runtime when the fields are added to the work items.
4. Type a fixed value in the **Value** field (**ALT+V**), or select **Insert Value** (**ALT+I**) to select an IA Value from the **Choose Value** window.
5. Select the **Use this field to search for existing items** checkbox to use this index value to check for duplicate work items .
6. Click **Set** (**ALT+E**) to add the mapping you constructed to the **Field to Value Mappings** list.
7. Optionally, make additional mappings to other fields defined by the work items class.
8. To delete an existing field to value mapping, select the field and then click **Delete** (**ALT+D**).
9. Click **OK** to close the window and return to the **Global 360 Export Setup** window.

## Related Topics

“Setting Up Work Items” on page 178

“Creating Work Items and Assigning Work Item Classes” on page 178

“Searching for Existing Workitems” on page 180

### 7.2.3.3 Searching for Existing Workitems

During setup, you can select how the Global 360 Export module searches for existing work items and what action to perform when a duplicate item is found.

#### To search for existing work items:

1. Run Global 360 Export in setup mode. The **Global 360 Export Setup** window displays.
2. Select the **Searching** tab in the **Setup** window.
3. Select the **Don't search for items, may result in duplicates but is faster** to disable searching.
4. Select the **Search for duplicate items** option to enable searching.
5. Select how to search for duplicate items by:
  - Selecting **Query by index field** to search for duplicate index entries. Specify which index entries to use by selecting the **Use this field to search for existing items** checkbox in the **Form Setup** window. An existing work item must match all the specified indexing fields before it is considered a duplicate.
  - Selecting **Query by name** to search for duplicate work item names. The export module searches for work items that match the name defined in the **Tree Conversion** tab as described in “Creating Work Items and Assigning Work Item Classes” on page 178.
  - Selecting both checkboxes to search for duplicates using both index entries and work item names. If no duplicates are found, then a new work item is created.
6. Decide what to do when a duplicate work item is found. In the **If a duplicate item is found** section, select one of the following three options:
  - **Update existing work item by replacing index fields and pages:** This option deletes the existing pages and replaces them with the newly exported ones. The indexing fields which you have defined are also replaced. This option only applies to work items exported at or below the trigger level.



#### Caution

Use this option with extreme caution since it could erase vital data if not set up properly.

- **Update existing item by appending images and updating index fields:** This option is safer since it does not modify or erase any existing data. It simply adds to the existing data.
  - **Report an error to InputAccel and Enterprise server's Event Log; don't modify existing item:** This option is the safest option since it does not modify the database at all if a duplicate is found. Use this option only if duplicates are rare or unexpected and you want to handle them manually.
7. Decide to report an error if no duplicates are found. If you are expecting to find duplicate items, select the **Report error if search doesn't find anything** checkbox. If this checkbox is selected, an error is reported when no duplicate is found, and a new work item is not created. Otherwise, a new work item is created each time a page is ready to be exported and no duplicate is found.



**Note:** Certain error handling settings override the duplicate item replacement settings. Specifically, if you select **Search for duplicate items** and **Report an error to the InputAccel Servers Event Log; don't modify existing item** and then select any of the **Continue current task...** error handling options, the existing item is modified when the task continues, resulting in duplicate work items. To avoid creating duplicate work items, select one of the **Abort current task...** error handling options. If you use **Prompt user with these options**, instruct the operator to use the **Abort** button but not the **Continue** button.

## Related Topics

[“Setting Up Work Items” on page 178](#)

[“Creating Work Items and Assigning Work Item Classes” on page 178](#)

[“Assigning Values to Work Item Indexing Fields” on page 179](#)

### 7.2.3.4 Defining Error Handling

You can specify how the module handles errors that occur during production. For an explanation of how to handle export module errors in an *IPP*, see [Handles errors in a finish event handler](#).



**Note:** If the export is successful, then the module sets the `<ExportResult> IA Value` to zero. If any errors occurred, then `<ExportResult>` contains the error code number. In addition, the module logs the same error to the Windows Event Log on the machine running the Intelligent Capture Server.

#### To specify what to do when an error occurs while exporting:

1. Run Global 360 Export in setup mode. The **Global 360 Export Setup** window displays.
2. Select the **Error Handling** tab from the **Setup** window.

3. Under **If document has already been exported**, select one of the following:

- **Skip: do not re-export document**
- **Replace: export document again**



**Note:** If the index information for the document has changed, then reexporting causes multiple copies of the document being stored in Global 360 Execute360. If there is any question, delete the previously exported documents from Global 360 Execute360 before reexporting. You can determine which documents have already been exported by looking at the *<IName>* IA Value for each node in the tree. If *<IName>* does not contain an empty string, then the node has been exported.

4. Under **When an error occurs**, select **Automatically retry**, to have the module retry a failed task before returning an error code. In the **Automatically retry** field, type the number of times to retry the task.

5. Under **If retrying fails or does not apply**, select one of the following options (Alt-R):

- **Abort current task and keep accepting tasks:** This option aborts the current task and the module continues accepting tasks. The user does not see an error window when this option is selected and an error occurs. The only way to determine that an error has occurred is to check the *<ExportResult>* IA Value in the *Finish* event handler of the IPP.
- **Abort current task, then stop accepting tasks:** This option aborts the current task and the module stops accepting subsequent tasks. The module ignores errors but reports them in the *<ExportResult>* IA Value and the Windows Event Log.
- **Continue current task and keep accepting tasks:** This option continues processing the current task and the module continues accepting tasks. The module ignores errors but reports them in the *<ExportResult>* IA Value and the Windows Event Log.
- **Continue current task, then stop accepting tasks:** This option continues processing the current task and the module stops accepting subsequent tasks. The module ignores errors but reports them in the *<ExportResult>* IA Value and the Windows Event Log.
- **Prompt user with these options:** This option halts processing and prompts the user with the window, and an error result is logged to the *<ExportResult>* IA Value and the Windows Event Log. During production, you can click **Abort**, **Retry**, or **Continue**. You can then select **Stop accepting tasks** from the **File** menu for the module to stop accepting tasks.



**Note:** Certain error handling settings override the duplicate item replacement settings. Specifically, if you select **Search for duplicate items** and **Report an error to the InputAccel Server's Event Log; don't modify**

**existing item**, and then select any of the **Continue current task...** error handling options, duplicate work items are created when an existing item is modified and the task continues. To avoid creating duplicate work items, select one of the **Abort current task...** error handling options. If using **Prompt user with these options**, instruct the operator to use the **Abort** button but not the **Continue** button.

## 7.3 Running Global 360 Export in Production

After the module has been set up, tested, and placed in a production environment, operators and administrators will run the module in production.

For information related to common production tasks for unattended modules, see *Running a Module for Production* in the *OpenText Intelligent Capture - Module Reference (ECPCORE-CMD)* guide.



**Note:** The *Running Modules in Production Mode* section contains production topics that are common to many unattended modules and may not apply to this module.

### 7.3.1 Handling Errors in a Finish Event Handler

Global 360 Export error handling occurs in a **Finish** event handler rather than an **Error** event handler in the *IPP*. When the Global 360 Export module encounters an error, it sets the `<ExportResult>` IA Value to the appropriate error code, logs an error message to the Windows Event Log, and finishes the task with a success status. The success status causes the module to call the steps **Finish** event handler. The module calls **Error** event handlers only if the task finishes with a failure status.

Finishing the task with a success status even though an error occurs, enables the custom export module to continue processing the remaining tasks in the batch. Most custom export module errors are due to one or several invalid index entries that the system cannot accept. In this case, you can reroute these pages to another machine for correction, while the export module continues processing the remaining tasks.

## 7.4 Reference—Global 360 Export

The topics within this section contain reference information useful while using the application in setup or production.

## 7.4.1 Windows

The topics within this section provide descriptions of windows accessible from the application. The topics list the user interface element name and include a brief description of actions available from the window.

### 7.4.1.1 Global 360 Export

The Global 360 Export module displays status and error information in the production window while the module runs. All operations are performed through the modules menus.

The **Global 360 Export** window is the control center for running and monitoring export tasks during production.

**Table 7-1: Global 360 Export Window**

Element	Description
<b>File</b> menu	The <b>File</b> menu enables you to open and process batches, and open sessions for those batches.
<b>Batch</b> menu	The <b>Batch</b> menu enables you to set up and run batches.
<b>Help</b> menu	Provides access to the help system where you can find information to guide you while working in the module.
<b>Task Progress</b>	An expanding bar represents the current task progress.
<b>Processing from batch</b>	The name of the batch that is being processed.
<b>Instance</b>	The name of the instance the batch is based on.
<b>Task Node</b>	The current node being processed.
<b>Tasks remaining on server</b>	The number of tasks remaining to be processed.

Element	Description
Error Message pane	<p>The <b>Error Message</b> pane opens in the Global 360 Export window when an error is encountered during production. This pane gives a short explanation of the error. This error message also displays in the <b>Activity Messages</b> pane, where more information about the error is given.</p> <p>When you select the reported error in the <b>Error Message</b> pane, the error is highlighted in the <b>Activity Messages</b> pane. You can then obtain information about the error message including the error code, and information about the batch, instance, and task in which the error occurred.</p> <p>If you double-click the reported error, it is removed from the <b>Error Message</b> pane. A black circle with an X appears at the location of the error in the <b>Activity Messages</b> pane, indicating that you have reviewed the error.</p>
Activity Messages pane	<p>The <b>Activity Messages</b> pane is found in the Global 360 Export window, and reports all user and production activity and error messages during batch processing.</p> <p>When an error occurs, it is highlighted with a red circle and exclamation point. It states the error message, error code, and other relevant information. The error message is also reproduced in the <b>Error Message</b> pane directly above the <b>Activity Messages</b> pane.</p>

#### 7.4.1.1.1 File Menu

The **File** menu of the **Global 360 Export** window contains the following items:

**Table 7-2: Global 360 Export Window, File Menu**

Element	Description
Wait for task	Processes tasks unattended as they become available from the Intelligent Capture Server.
Stop accepting tasks	Stops accepting tasks from the Intelligent Capture Server.
Open Batch	Opens a batch for processing in Open Batch mode.
Close Batch	Closes an open batch.
Exit	Exits the Global 360 Export module.

#### 7.4.1.1.2 Batch Menu

The **Batch** menu of the **Global 360 Export** window contains the following items:

**Table 7-3: Global 360 Export Window, Batch Menu**

Element	Description
Setup	Enables you to check or change the batch configuration settings.
Run Export	Exports the document.

#### 7.4.1.2 Global 360 Export Setup

The **Global 360 Export Setup** window contains the following tabs:


**Table 7-4: Global 360 Export Setup Window**

Element	Description
Tree Conversion	The <b>Tree Conversion tab</b> enables you to create and assign work item classes.
Searching	The <b>Searching tab</b> enables you to select how the Global 360 Export module searches for existing work items and what action to perform when a duplicate item is found.
Error Handling	The <b>Error Handling tab</b> enables you to specify how the module handles errors that occur during production.

##### 7.4.1.2.1 Tree Conversion tab

The **Tree Conversion** tab settings include:

**Table 7-5: Global 360 Export Setup Window, Tree Conversion tab**

Element	Description
Level	<p>Select the checkbox for each level you want to export. Each level that you select becomes a work item in the Global 360 Execute360 system. Select at least one level.</p> <p> <b>Note:</b> If you export work items at a higher level than the trigger level, only work items at or below the trigger level are routed through the Global 360 Export module. Empty folders are created for levels exported above the trigger level, but the folders are not routed through the Global 360 Export module.</p>
Class	<p>For each enabled level, select an available class from the <b>Class</b> list box. Define a class for each level you want to export above the page level in the tree.</p>
Name	<p>Specify a name in the <b>Name</b> field by:</p> <ul style="list-style-type: none"> <li>• Typing a fixed name such as Travel Expenses.</li> <li>• Using a variable name by inserting an IA Value.</li> <li>• Using a variable name by inserting a naming schema to uniquely name each work item with respect to its position in the tree. Provide a name for each selected level, including the page level.</li> </ul>
Fields	<p>Click the <b>Fields</b> button corresponding to the work item whose fields you want to map. The <b>Form Setup</b> window displays and the <b>Field to Value Mappings</b> list displays your current mappings.</p>
Page	<p>Specify the name for the page that is exported.</p>
Insert Value...	<p>Click to select an IA Value.</p>

### 7.4.1.2.2 Searching tab


The **Searching** tab settings include:

**Table 7-6: Global 360 Export Setup Window, Searching tab**

Element	Description
Don't search for items, may result in duplicates but is faster	Select this option to disable searching.
Search for duplicate items	Select the <b>Search for duplicate items</b> option to enable searching.
Query by index field	Select <b>Query by index field</b> to search for duplicate index entries. Specify the index entries to use by selecting the <b>Use this field to search for existing items</b> checkbox in the <b>Form Setup</b> window. An existing work item must match all the specified indexing fields before it is considered a duplicate.
Query by name	Select <b>Query by name</b> to search for duplicate work item names. The module searches for work items that match the name defined in the <b>Tree Conversion</b> tab.
Report error if search doesn't find anything	If you are expecting to find duplicate items, select the <b>Report error if search does not find anything</b> checkbox. If this checkbox is selected, an error is reported when no duplicate is found, and a new work item is not created. Otherwise, a new work item is created each time a page is ready to be exported and no duplicate is found.

If a duplicate item is found:

**Table 7-7: Global 360 Export Setup Window, Searching tab: Duplicates**

Element	Description
Update existing work item by replacing index fields and pages	<p>This option deletes the existing pages and replace them with the newly exported ones. The indexing fields which you have defined are also replaced. This option only applies to work items exported at or below the trigger level.</p> <div style="background-color: #f0f0f0; padding: 5px;">  <p><b>Caution</b> Use this option with extreme caution since it could erase vital data if not setup properly.</p> </div>


Element	Description
Update existing work item by appending images and updating empty index fields	This option is safer than <b>Update existing work item by replacing index fields and pages</b> since it does not modify or erase any existing data. It simply adds to the existing data.
Report an error to the InputAccel Servers Event Log; do not modify existing item	This is the safest option since it does not modify the database at all if a duplicate is found. Use this option only if duplicates are rare or unexpected and you want to handle them manually.

### 7.4.1.2.3 Error Handling tab

If the export is successful, then the module sets the *<ExportResult>* IA Value to zero. If any errors occurred, then *<ExportResult>* contains the error code number. In addition, the module logs the same error to the Windows Event Log on the machine running the Intelligent Capture Server.

The **Error Handling** tab settings include:

**Table 7-8: Global 360 Export Setup Window, Error Handling tab**

Element	Description
If document has already been exported:	<ul style="list-style-type: none"> <li>• <b>Skip:</b> Do not reexport document.</li> <li>• <b>Replace:</b> Export document again.</li> </ul> <p> <b>Note:</b> If the index information for the document has changed, then reexporting could cause more than one copy of the document stored in Global 360 Execute360. If there is any question, delete all previously exported documents from Global 360 Execute360 before reexporting. You can determine which documents have already been exported by looking at the <i>&lt;IName&gt;</i> IA Value for each node in the tree. If <i>&lt;IName&gt;</i> does not contain an empty string, then the node has been exported.</p>
When an error occurs:	<b>Automatically retry n times, if applicable:</b> Select <b>Automatically retry</b> (Alt-E) if, when a task fails, you want the module to retry that task automatically before returning an error code. In the <b>Automatically retry</b> field, type the number of times to retry the task.

Element	Description
<p>If retrying fails or does not apply:</p>	<ul style="list-style-type: none"> <li>• <b>Abort current task and keep accepting tasks:</b> This option aborts the current task and the module continues accepting tasks. The user does not see an error window when this option is selected and an error occurs. The only way to determine that an error has occurred is to check the &lt;ExportResult&gt; IA Value in the &lt;Finish&gt; event handler of the <i>IPP</i>.</li> <li>• <b>Abort current task, then stop accepting tasks:</b> This option aborts the current task and the module stops accepting subsequent tasks. The module ignores errors but reports them in the &lt;ExportResult&gt; IA Value and the Windows Event Log.</li> <li>• <b>Continue current task and keep accepting tasks:</b> This option continues processing the current task and the module continues accepting tasks. The module ignores errors but reports them in the &lt;ExportResult&gt; IA Value and the Windows Event Log.</li> <li>• <b>Continue current task, then stop accepting tasks:</b> This option continues processing the current task and the module stops accepting subsequent tasks. The module ignores errors but reports them in the &lt;ExportResult&gt; IA Value and the Windows Event Log.</li> <li>• <b>Prompt user with these options:</b> This option halts processing. It also provides the user with these options and an error result is logged to the &lt;ExportResult&gt; IA Value and the Windows Event Log. During production, you can select <b>Abort</b>, <b>Retry</b>, or <b>Continue</b>. You can then select <b>Stop accepting tasks</b> from the <b>File</b> menu for the module to stop accepting tasks.</li> </ul>



**Note:** Certain error handling settings, instruct the operator to use the **Abort** button but not the **Continue** button.

### 7.4.1.3 Global 360 Logon

The **Global 360 Logon** window enables you to connect to the server system.


**Table 7-9: Global 360 Logon Window**

Element	Description
User name	The valid user name to connect to the server.
Password	A valid password to connect to the server.
Domain	A valid domain.
OK	Click <b>OK</b> to submit your credentials and log on to the server system.

### 7.4.1.4 Form Setup

The **Form Setup** window displays the **Field to Value Mappings** list showing your current mappings.

**Table 7-10: Form Setup Window**

Element	Description
Field to Value Mappings	The <b>Field to Value Mappings</b> list displays your current work item mappings. The constraints for the current field are displayed below the <b>Field</b> list box. These constraints are not enforced during setup but are enforced at runtime when the fields are added to the work items. You can define a new mapping by selecting a field from the list.
Field	Define a new mapping by selecting a field from the <b>Field</b> list box.   <b>Note:</b> The constraints for the current field are displayed below the <b>Field</b> list box. These constraints are not enforced during setup but are enforced at runtime when the fields are added to the work items.
Value	Enables you to type a fixed value.
Insert value	Displays the <b>Choose Value</b> window where you can specify an <b>IA Value</b> .
Use this field to search for existing items	Use this index value to check for duplicate work items (as specified in the <b>Searching</b> tab).

Element	Description
Set	Adds the mapping you constructed to the <b>Field to Value Mappings</b> list.
Delete	Deletes the selected field from the <b>Field to Value Mappings</b> list.

## 7.4.2 IA Values

The topics in this section describe IA values that can be used with this application.

### 7.4.2.1 Input IA Values

Input IA Values include input file variables, such as *<InputImage>*, which serve as pointers to stage files.

**Table 7-11: Input IA Values**

IA Value	Description
<i>&lt;InputImage&gt;</i>	<p>The tasks input image on the Intelligent Capture Server. The <i>&lt;InputImage&gt;</i> is a binary <i>TIFF</i> file. This variable is the modules only trigger variable. After it is set to a non-zero value, the Intelligent Capture Server sends tasks to a running Global 360 Export machine.</p> <ul style="list-style-type: none"> <li>• <b>Attributes:</b> File, Input, Trigger</li> <li>• <b>Level:</b> 0</li> </ul>

### 7.4.2.2 Output IA Values

Output IA Values include output processing variables, which store data generated by the module during processing, such as the date and time a page was processed.

**Table 7-12: Output IA Values**

IA Value	Description
ExportResult	<p>If all documents contained by the task were exported successfully, this value is set to zero. Otherwise, this value contains a negative number indicating the error. You can check this variable in a &lt;Finish&gt; event handler after export to determine whether any documents require have index values reentered.</p> <p>To determine which documents require reindexing, check the &lt;Error&gt; IA Value to discover the node where the error occurred.</p> <ul style="list-style-type: none"> <li>• <b>Attributes:</b> Integer, Output</li> <li>• <b>Level:</b> T</li> </ul>
<Error>	<p>If the document represented by the given node was not exported successfully, this variable is set to a negative value (representing an error code). This IA Value is available at all node levels. You can check this variable in a &lt;Finish&gt; event handler after export.</p> <ul style="list-style-type: none"> <li>• <b>Attributes:</b> Integer, Output</li> <li>• <b>Level:</b> 0-7</li> </ul>
<IName>	<p>Global 360 Export work item internal name, assigned by Global 360 Export when the work item is saved. This value is only set if the work item was exported successfully. Combined with the &lt;RevisionLevel&gt; value, this value can be used to find the work item within Global 360 Export at a later time.</p> <ul style="list-style-type: none"> <li>• <b>Attributes:</b> String, Output</li> <li>• <b>Level:</b> 1-7</li> </ul>
<RevisionLevel>	<p>Global 360 Export work item revision level, assigned by Global 360 Export when the work item is saved. This value is only set if the work item was exported successfully. Combined with the &lt;IName&gt; value, this value can be used to find the work item within Global 360 Export at a later time.</p> <ul style="list-style-type: none"> <li>• <b>Attributes:</b> Long, Output</li> <li>• <b>Level:</b> 1-7</li> </ul>



## Chapter 8

# Export for SAP Archive and AP Connect

This section includes the Intelligent Capture specialized enterprise export module: **ecpcore-cxc**.

Export for SAP Archive and AP Connect archives Intelligent Capture content, metadata, images, and index values to SAP using IBM Content Manager CommonStore. For supported versions of IBM Content Manager CommonStore, see the *Intelligent Capture Release Notes* (available in My Support (<https://support.opentext.com/>)).

## 8.1 Features

Export for SAP Archive and AP Connect module features include:

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### Exports administrative data and content to an SAP system

Populates an SAP system with Intelligent Capture content and metadata.

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### Exports single and multi-page image files as well as non-image data

Converts exported images into various file types, color formats, and compression settings based on options selected during module setup. Some image formats (for example, *TIFF*) can contain multiple images per item or part. For formats that do not support multiple pages (for example, *JPEG*), multiple pages can be exported as multiple items or parts of a document. In addition to image data, the module can export non-image data without conversion. In this case, the module passes through the data without attempting to perform any type of conversion. For both image and non-image data, the module can also specify a *MIME* type. The MIME type specifies the viewer that is required to view the object when it is later retrieved from storage.

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### Processes pages for export using document definitions

Uses document definitions for concise classification of data exported to an SAP system. This feature enables the SAP system to recognize incoming data and categorize and store it appropriately. Exporting items based on document definitions provides flexibility. For example, you can export multiple file types to multiple locations without defining multiple steps of the module in a process.

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### Links related exported metadata and content using index fields

Uses SAP index fields to map relationships between exported metadata and content. During module setup, index field values are assigned to each document definition, which maps the relationships between exported data and metadata.

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**Uses IA Values to control and update export parameters**

Automatically controls and updates export parameters using IA Values configured during module setup.

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## 8.2 Setting Up Export for SAP Archive and AP Connect

Most configuration information for Intelligent Capture client modules is defined during *module setup*. You can run a module in setup mode from Intelligent Capture Designer, from Intelligent Capture Administrator, or from a command prompt with appropriate arguments. For more information, see *Ways to Run a Module in Setup Mode* in the *OpenText Intelligent Capture - Module Reference (ECPCORE-CMD)* guide.

When launched in setup mode, a client module displays the **Setup** window in which you can specify the module's configuration settings.

### 8.2.1 Setting Document Definition Properties

Document definition properties are set from the **Definition Properties window**. Each document definition includes all of the settings specific to IBM Content Manager CommonStore which must be defined before successfully exporting a document. Export for SAP Archive and AP Connect can convert images it exports into various file types, color formats, and compression settings.

**To set document definition properties:**

1. Run the Export for SAP Archive and AP Connect module for setup, and the **Export for SAP Archive and AP Connect Setup window** displays.
2. Select the **Export tab**.
3. If you are creating a **Document Definition**, click **New**. If you are editing an existing definition, select it from the **Document Definition Set** list, and click **Edit**. Either of these actions displays the **Definition Properties** window.
4. Select the tab and enter the appropriate information.
  - **General tab**: Settings related to the CommonStore server and the type and location of the SAP document
  - **Indexes tab**: Settings that define what SAP index fields, if any, are populated, as well as what Archive index (typically IBM Content Manager) fields are populated.
  - **Image tab**: Settings that define the source and type of image document to store.
5. Click **OK** and the new definition is added, or the modifications are made to the existing definition. They are now available for Export for SAP Archive and AP Connect.

### 8.2.1.1 Setting Up SAP and Archive Index Fields

SAP and Archive index fields are created, edited, and deleted from the **Indexes** tab in the **Definition Properties** window.

**To create, modify, or delete an index:**

1. Run the Export for SAP Archive and AP Connect for setup, and the **Export for SAP Archive and AP Connect Setup** window displays.
2. Click the **Export** tab.
3. If you are creating new **Document Definition**, click **New**. If you are editing an existing definition, select it from the **Document Definition Set** list, and click **Edit**. Either of these actions displays the **Definition Properties** window.
4. In the **Definition Properties** window, select the **Indexes** tab.
5. From the **SAP or Archive Indexes** group box you can:
  - Click **New** and the **New SAP Index** window displays.
  - Select an existing index and click **Edit** and the **Edit Index** window displays.
  - Select an existing index and click **Delete** to remove the index from the list. If you are not creating new indexes or editing existing indexes, you can click **OK** to save the settings and close the window.
6. In the **Index Name** field, type the name of the index field. You can also **Browse** and select an appropriate IA Value in the **Choose Value** window.
7. In the **Index Value** field, type the value for the index field. You can also **Browse** and select an appropriate IA Value in the **Choose Value** window.
8. While in the **Definition Properties** window, you can also select the **General** tab or **Image** tab to specify other parameters for the document set.
9. Click **OK** to save your settings and close the window. You are returned to the **Export for SAP Archive and AP Connect Setup** window.

#### Related Topics

[“Setting Image Properties” on page 198](#)

[“Setting CommonStore and Work Item Properties” on page 198](#)

### 8.2.1.2 Setting Image Properties

The **Image tab** in the **Definition Properties window** contains settings that define the source and type of document to store. For image files, you can specify the file type, format, and compression parameters.

**To specify image property settings for the document definition set:**

1. Run the Export for SAP Archive and AP Connect module for setup, and the **Export for SAP Archive and AP Connect Setup window** displays.
2. Select the **Export tab**.
3. If you are creating a document definition, click **New**. If you are editing an existing definition, select it from the **Document Definition Set** list, and click **Edit**. Either of these actions displays the **Definition Properties** window.
4. In the **Definition Properties** window, select the **Image** tab.
5. Specify the **File Value** to use for the source document.
6. Select **Copy the file without modification** or **Save the file with these settings**.
7. If you save the file with custom settings, specify the **File Type**, **Color Format**, and **Compression** information.
8. While in the **Definition Properties** window, you can also click the **Indexes tab** to specify other parameters for the document set.
9. Click **OK** to save your changes and return to the **Export for SAP Archive and AP Connect Setup** window.

#### Related Topics

[“Setting Up SAP and Archive Index Fields” on page 197](#)

[“Setting CommonStore and Work Item Properties” on page 198](#)

### 8.2.1.3 Setting CommonStore and Work Item Properties

The **General tab** in the **Definition Properties window** contains settings related to the CommonStore server, and work item properties such as **Archive Mode**, **Archive ID**, and other document information.

**To specify general server and archiving information for the documents:**

1. Run the Export for SAP Archive and AP Connect module for setup, and the **Export for SAP Archive and AP Connect Setup window** is displayed.
2. Select the **Export tab**.
3. If you are creating a **Document Definition**, click **New**. If you are editing an existing definition, select it from the **Document Definition Set** list, and click **Edit**. Either of these actions displays the **Definition Properties** window.

4. In the **Definition Properties** window, select the **General tab**.
5. Specify the **CommonStore Server** and **Work Item** information.
6. While in the **Definition Properties** window, you can also select the **Indexes tab** or **Image tab** to specify other parameters for the document set.
7. Click **OK** and the savings are saved and you are returned to the **Export for SAP Archive and AP Connect Setup** window.

### Related Topics

[“Setting Document Definition Properties” on page 196](#)

[“Setting Up SAP and Archive Index Fields” on page 197](#)

[“Setting Image Properties” on page 198](#)

## 8.3 Running Export for SAP Archive and AP Connect in Production

After the module has been set up, tested, and placed in a production environment, operators and administrators will run the module in production. For information related to common production tasks for unattended modules, see *Running a Module for Production* in the *OpenText Intelligent Capture - Module Reference (ECPCORE-CMD)* guide.



**Note:** The *Running Modules in Production Mode* section contains production topics that are common to many unattended modules and may not apply to this module.

## 8.4 Reference—Export for SAP Archive and AP Connect

The topics within this section contain reference information useful while using the application in setup or production.

### 8.4.1 Windows

The topics within this section provide descriptions of windows accessible from the application. The topics list the user interface element name and include a brief description of actions available from the window.

### 8.4.1.1 Definition Properties

Document definition properties are set from the **Definition Properties** window. Each document definition includes all of the settings specific to CommonStore which must be defined for a successful export.

The **Definition Properties** window appears when you click the **New** or **Edit** buttons on the **Export** tab of the **Export for SAP Archive and AP Connect Setup** window.

The tabs in the **Definition Properties** window are:

- “General tab” on page 200
- “Indexes tab” on page 202
- “Image tab” on page 202

#### Related Topic

“Setting Document Definition Properties” on page 196

#### 8.4.1.1.1 General tab

The **General** tab in the **Definition Properties window** contains settings related to the CommonStore server, and work item properties such as archiving mode, ID, and document information.

**Table 8-1: Definition Properties Window, General tab**

Element	Description
Definition Name	The name for your document definition.
CommonStore Server	The server where the documents are exported. <ul style="list-style-type: none"> <li>• <b>Host:</b> The host name of the CommonStore server where the document is exported. You can also <b>Browse</b> and select an appropriate IA Value in the <b>Choose Value</b> window.</li> <li>• <b>Port:</b> The port number for the CommonStore server where the document is exported. You can also <b>Browse</b> and select an appropriate IA Value in the <b>Choose Value</b> window.</li> </ul>

Element	Description
Workitem	<ul style="list-style-type: none"> <li>• <b>Archive Mode:</b> For selecting one of the following SAP document archiving scenarios.</li> <li>• <b>Early:</b> Stores scanned documents for subsequent entry. Content is exported to the content server and administrative data is exported to the SAP System via SAP ArchiveLink in the same export operation. This functionality means a document is scanned and moves around the business in electronic form, and then the electronic images and the corresponding administrative data are exported as a single task.</li> <li>• <b>Late:</b> Stores the document to CommonStore with barcode values for SAP. Administrative data is stored in the SAP System first (using traditional SAP data entry methods), and then content is exported to the content server at a later time. In late archiving mode, a document travels around the business in paper form until processing steps are complete. Documents that are late-archived are not available until after the entire archive operation has been completed.</li> <li>• <b>Archive ID:</b> The ID of the SAP ArchiveLink repository you want to use. You can also <b>Browse</b> and select an appropriate IA Value in the <b>Choose Value</b> window.</li> <li>• <b>Document Class:</b> The SAP document class to which the document belongs. You can also <b>Browse</b> and select an appropriate IA Value in the <b>Choose Value</b> window.</li> <li>• <b>Bar code:</b> The barcode value sent to SAP during late archiving. You can also <b>Browse</b> and select an appropriate IA Value in the <b>Choose Value</b> window.</li> <li>• <b>Document Type:</b> For the Early Archiving Mode, enter the type of archive object to use when early archiving. This option is unavailable if you specified <b>Late</b> for the <b>Archive Mode</b>. You can also <b>Browse</b> and select an appropriate IA Value in the <b>Choose Value</b> window.</li> </ul>

### Related Topic

[“Setting Document Definition Properties” on page 196](#)

“Setting CommonStore and Work Item Properties” on page 198

### 8.4.1.1.2 Indexes tab

The **Indexes** tab in the **Definition Properties window** contains settings that define the SAP index fields and archive index fields that must be populated.

**Table 8-2: Definition Properties Window, Indexes tab**

Element	Description
SAP Indexes	Create, edit, or delete an SAP index field. <ul style="list-style-type: none"> <li>• <b>New:</b> Creates an SAP index field</li> <li>• <b>Edit:</b> Select an existing index field and click <b>Edit</b> to modify its properties</li> <li>• <b>Delete:</b> Deletes an existing SAP index field</li> </ul>
Archive Indexes	Create, edit, or delete an Archive index field. <ul style="list-style-type: none"> <li>• <b>New:</b> Creates an Archive index field</li> <li>• <b>Edit:</b> Select an existing index field and click <b>Edit</b> to modify its properties</li> <li>• <b>Delete:</b> Deletes an existing Archive index field</li> </ul>

### 8.4.1.1.3 Image tab

The **Image** tab in the **Definition Properties window** contains settings that define the source and type of document to store. For image files, you can specify the file type, format, and compression parameters.

**Table 8-3: Definition Properties Window, Image tab**

Element	Description
File Value	The file for the source document. The source file can be any of the <i>&lt;InputImage&gt;</i> or <i>&lt;OutputImage&gt;</i> files in the entire process, or they can be any of the level 0 through 7 Input file values as defined in the <i>MDF</i> .
Copy the file without modification	Exports the image “as-is”, without converting the image. This image can be any file type.

Element	Description
Save the file with these settings	<p>(For image file types only) Converts the image to the format specified.</p> <ul style="list-style-type: none"> <li>• <b>File Type:</b> The file format of the exported file.</li> <li>• <b>Color Format:</b> Controls the color level for the exported file.</li> <li>• <b>Compression:</b> The compression type to apply to the image file.</li> <li>• <b>Merge Annotations:</b> Merges annotations with the image data when saving.</li> </ul>

### 8.4.1.2 Export for SAP Archive and AP Connect

The **Export for SAP Archive and AP Connect** window is the control center for launching and monitoring export tasks.

**Table 8-4: Export for SAP Archive and AP Connect Window**

Element	Description
File menu	Contains options that enable you to open and process batches.
Run menu	Contains options that enable you to run all available batches or a single selected batch.
Help menu	Provides access to the help system where you can find information to guide you while working in the module.
Toolbar	Provides buttons to run or close export processes.
Task Progress	An expanding bar that represents the current task progress.
Processing from batch	The name of the batch that is being processed.
Instance	The name of the Instance on which the batch is based.
Task Node	The current node being processed.
Tasks remaining on server	The number of tasks remaining to be processed.

Element	Description
<b>Error Message pane</b>	<p>The <b>Error Message</b> pane opens when an error is encountered during production. This pane gives a short explanation of the error.</p> <p>When you select the reported error in the <b>Error Message</b> pane, the error is highlighted in the <b>Activity Messages</b> pane. This pane provides information about the error message including the error code, and information about the batch, instance, and task in which the error occurred.</p> <p>If you double-click the reported error, it is removed from the <b>Error Message</b> pane. A black circle with an X appears at the location of the error in the <b>Activity Messages</b> pane, indicating that you have reviewed the error.</p>
<b>Activity Messages pane</b>	<p>The <b>Activity Messages</b> pane reports all user and production activity and error messages during batch processing.</p> <p>When an error occurs, it is highlighted with a red circle and exclamation point. It states the error message, error code, and other relevant information about the batch, instance, and task. The error message is also reproduced in the <b>Error Message</b> pane directly above the <b>Activity Messages</b> pane.</p>

#### 8.4.1.2.1 File Menu

The **File** menu on the **Export for SAP Archive and AP Connect window** contains commands for exporting batches.

**Table 8-5: Export for SAP Archive and AP Connect Window, File Menu**

Element	Description
<b>Open Batch</b>	Opens a batch for processing in Open Batch mode.
<b>Close Batch</b>	Closes an open batch.
<b>Set Up Instance</b>	Displays the <b>Export for SAP Archive and AP Connect Setup</b> window, allowing you to specify custom settings for the Open Batch.
<b>Export</b>	Processes the open batch.
<b>Exit</b>	Exits the Export for SAP Archive and AP Connect module.

### 8.4.1.2.2 Run Menu

The **Run** menu on the **Export for SAP Archive and AP Connect window** contains commands for processing batches.




**Table 8-6: Export for SAP Archive and AP Connect Window, Run Menu**



Element	Description
All Batches	<b>All Batches</b> mode is a “Wait for Task” mode, meaning that you can only process batches that are queued on the Intelligent Capture Server for the module. In <b>All Batches</b> mode, the module receives any queued tasks from any open batch as the tasks become available from the Intelligent Capture Server.
Single Batch	<b>Single Batch</b> mode is a “Wait for Task” mode. In <b>Single Batch</b> mode, you select a single queued batch to process.
Stop	Cancel processing of the current task and stop accepting tasks from the Intelligent Capture Server.

### 8.4.1.2.3 Export for SAP Archive and AP Connect Toolbar

The **Export for SAP Archive and AP Connect toolbar** on the **Export for SAP Archive and AP Connect window** provides you with buttons to launch or close export processes.

**Table 8-7: Export for SAP Archive and AP Connect Toolbar**

Button	Button Name	Description
	Open Batch	Opens a batch for processing in Open Batch mode.
	Close Batch	Closes an open batch.
	Run All Batches	<b>Run All Batches</b> mode is a “Wait for Task” mode, meaning you can only process batches that are queued on the Intelligent Capture Server for the module. In <b>Run All Batches</b> mode, the module receives any queued tasks from any open batch as the tasks become available from the Intelligent Capture Server.

Button	Button Name	Description
	Run Single Batch	<b>Run Single Batch</b> mode is a “Wait for Task” mode. In Run Single Batch mode, you choose a single queued batch to process.
	Stop	Cancel processing of the current task and stop accepting tasks from the Intelligent Capture Server.

### 8.4.1.3 Export for SAP Archive and AP Connect Setup

To display the **Export for SAP Archive and AP Connect Setup** window, run the Export for SAP Archive and AP Connect module in setup mode.

#### 8.4.1.3.1 Export tab

The **Export** tab on the **Export for SAP Archive and AP Connect Setup** window enables you to specify the following:

- A set of document definitions
- Definition to use for the file that you are exporting
- Criteria for splitting documents

**Table 8-8: Export for SAP Archive and AP Connect Setup Window, Export tab**

Element	Description
<b>Document Definition Set</b>	<p>Lists the currently defined document definitions for the project. From here you can create definitions, or edit or delete existing definitions.</p> <ul style="list-style-type: none"> <li>• <b>New:</b> Creates a definition and opens the <b>Definition Properties</b> window on which you can configure that definition.</li> <li>• <b>Edit:</b> Opens the <b>Definition Properties</b> window on which you can configure the setup for the selected definition. This button is unavailable if no definitions are selected.</li> <li>• <b>Delete:</b> Deletes the currently selected definition. This button is unavailable if no definitions are selected.</li> </ul>

Element	Description
Split when value changes	Enter an IA Value to indicate that a subsequent page could be considered to be a new document. You can also <b>Browse</b> and select an appropriate IA Value in the <b>Choose Value</b> window. The default value is @17, which is the document (level 1) within the batch (level 7). This value results in a new document exported for every level 1 node in the batch tree.
Definition to Export	Determines the document definition that the module uses. Type a value or click the <b>Browse</b> button to select an IA Value.

### Related Topic

[“Setting Document Definition Properties” on page 196](#)

#### 8.4.1.3.2 Errors tab

The **Errors** tab is found on the [Export for SAP Archive and AP Connect Setup window](#). The **Errors** tab settings are:

**Table 8-9: Export for SAP Archive and AP Connect Setup window, Errors tab**

Element	Description
When an Error Occurs	<p>Select the <b>Prompt for an action</b> or <b>Automatically respond with the following actions</b> depending on whether production occurs on an attended or unattended workstation.</p> <ul style="list-style-type: none"> <li>• <b>Prompt for an action:</b> This option is for attended workstations only. Selecting this option suspends processing until the operator responds to the error on the <b>Production Error</b> window.</li> <li>• <b>Automatically respond with the following actions:</b> This option is for unattended workstations or when operator intervention is not necessary. You can specify the following settings when this option is selected. <ul style="list-style-type: none"> <li>– <b>Abort entire task:</b> Aborts the current task and returns an appropriate <i>&lt;ExportResult&gt;</i> IA Value, which is evaluated by instructions in the <b>IPP Finish</b> event handler. The module can continue processing other tasks depending on how you set the remaining options in this section. If you do not plan to provide error handling in your IPP, select the default settings of <b>Abort entire task</b> and <b>Set the batch priority to 0</b> when automatically responding to errors to avoid an ongoing, error retry situation.</li> <li>– <b>Skip node that produced the error and continue with remaining nodes:</b> Skips the node where error occurred and attempts to continue with the remaining nodes in the task, if any. The module returns an appropriate <i>&lt;ExportResult&gt;</i> IA Value for the node that produced the error occurred, which is evaluated by instructions in the <b>Finish</b> event handler of the IPP.</li> <li>– <b>Stop receiving tasks after current task:</b> Stops receiving tasks from the Intelligent Capture Server when an error occurs in the current task. This functionality is equivalent to the operator choosing the <b>Stop</b> command.</li> <li>– <b>Set the batch priority to 0:</b> Sets the batch priority of the current task to 0</li> </ul> </li> </ul>

Element	Description
	when an error occurs. This setting takes the batch offline, preventing further processing by any module until the administrator resets the batch priority. When this check box is cleared, the batch priority is not changed and batch processing continues as before the error occurred.
<b>Recovery Options</b>	<ul style="list-style-type: none"> <li>• <b>Automatically retry n times before reporting error:</b> Select this check box to automatically retry processing the task that caused an error. Specify the number of times the module must retry in the field to the right. Some error conditions can cease to exist upon subsequent attempts at processing a task. For example, a temporary file or record lock in the repository server can cause an error. However, this error can be resolved by the time the module attempts to process the task again. Clear the check box if you do not want the module to retry tasks that produce errors.</li> <li>• <b>Skip nodes that have already been successfully processed by this instance:</b> Prevents the module from reprocessing nodes that have already been successfully processed. When this field is cleared, the module reprocesses all nodes in the task, even those nodes that have already been successfully processed.</li> </ul>

### 8.4.1.3.3 Logging tab

The **Logging** tab on the **Export for SAP Archive and AP Connect Setup window** allows you to control the output of error information when errors are generated during task processing. The **Logging** tab options are:

**Table 8-10: Export for SAP Archive and AP Connect Setup Window, Logging tab**

Element	Description
<b>Log messages to a file</b>	Log messages to a specified file. When selected, it activates <b>Severity to log</b> and <b>File name</b> .
<b>Severity to log</b>	From the list box, select: <ul style="list-style-type: none"> <li>• <b>Errors Only</b></li> <li>• <b>Errors and Information</b></li> </ul>

Element	Description
<b>File name</b>	Contains the name and location of the log file name. You can use the <b>Browse</b> button to point to the file location from the <b>Select</b> window. When you log messages to a shared location and are running multiple copies of the module, specify a unique log file name for each module instance by specifying the appropriate IA Values in the file name.
<b>Send error messages to the InputAccel Server's Event Log</b>	Logs error messages to the Intelligent Capture Server.

**8.4.1.3.4 Info tab**

The **Info** tab on the **Export for SAP Archive and AP Connect Setup window** displays module and server information. This information cannot be edited. Modification of any of these properties must be completed during module setup.

**Table 8-11: Export for SAP Archive and AP Connect Setup Window, Info tab**

Element	Description
<b>Instance Properties</b>	
<b>Name</b>	The name of the module instance as declared in the <i>IPP</i> .
<b>Departments</b>	The names of departments defined in the batch or process.
<b>Process/Batch name</b>	The name of the batch or process that contains the module step.
<b>Process/Batch ID</b>	The unique ID number of the batch or process that contains the module step.
<b>InputAccel Server Connection</b>	
<b>Server name</b>	The Intelligent Capture Server name that is connected to the client workstation.
<b>Username</b>	The domain and user ID specified when the connection to the Intelligent Capture Server was established in setup mode.

### 8.4.1.4 Open Batch

The **Open Batch** window enables you to select a batch to run when you are in **Export for SAP Archive and AP Connect** production mode. This window displays all available batches, or enables you to select **Show only Batches with Tasks** and click the **Refresh** button to limit the list of batches.

### 8.4.1.5 Production Error

On attended workstations, you can prompt for operator response when you encounter errors during production. This functionality is enabled when you select the **Prompt for an action** check box from the **Errors** tab in setup mode. When an error occurs, the **Production Error** window displays the error message and error code as well as other relevant information about the batch, instance, and task. You are presented with the following options:

**Table 8-12: Production Error Window**

Element	Description
How do you want to handle this error	<ul style="list-style-type: none"> <li>• <b>Retry the current node:</b> Select this option when you can correct the error and, upon retry, the task is successfully completed.</li> <li>• <b>Stop all processing on this task:</b> Select this option when the task is causing the error. You stop task processing until the error is corrected.</li> <li>• <b>Continue with other nodes in this task:</b> Select this option when the node is causing the error. The node with an error is skipped as task processing continues with the other nodes.</li> </ul>
and set the batch's priority to 0	Select this check box to stop all batch processing. Unprocessed tasks that remain in the batch are stored on the Intelligent Capture Server until an administrator resets the batch priority to non-zero. Clear this check box if you want to keep processing the remaining tasks in the batch.
then stop waiting for tasks	Select this check box if you want to stop waiting for tasks. Until you select a processing mode, task processing stops at the client workstation. Clear this check box when you want to continue processing tasks in the current processing mode.

## 8.4.2 IA Values

The topics in this section describe IA values that can be used with this application.

### 8.4.2.1 Input IA Values

Input IA Values include input file variables, such as `<Level0_InputFile1>`, which serve as pointers to stage files, and input processing variables, which store setup data that a module uses to process tasks and includes default and user-defined module settings.

Following are the IA Values defined in `exfncm.mdf`, the Export for SAP Archive and AP Connect *MDF* module. You can add custom variables to this MDF. However, it is recommended to use dynamic values in the *IPP* or create a custom MDF for variables so they are not overwritten when updating the product.

**Table 8-13: Input IA Values**

IA Value	Description
Input file variable	
<code>&lt;Level&lt;n&gt;_InputFile&gt;</code>	<p>The input file for the task on the Intelligent Capture Server at the specified level, <code>&lt;n&gt;</code>.</p> <ul style="list-style-type: none"> <li>• <b>Attributes:</b> File, Input, NoTrigger</li> <li>• <b>Level&lt;n&gt;:</b> <code>&lt;n&gt;</code> = 0-7</li> </ul>
Input values	
<code>&lt;Ready&gt;</code>	<p>A secondary trigger value that can be used when no file values are specified or when another trigger is required to control the beginning of processing. If this value is used in the IPP, then it is a trigger. When all trigger values are non-zero, the module processes the current task.</p> <ul style="list-style-type: none"> <li>• <b>Attributes:</b> File, Input, Trigger</li> <li>• <b>Level:</b> T</li> </ul>
<code>&lt;Level&lt;n&gt;_Path&gt;</code>	<p>The path to which to export files. The path can consist of hard-coded path names and/or any number of IA Values that resolve into all or portions of a valid path. The path can be specified as a direct Windows path name or as a <i>UNC</i> path.</p> <ul style="list-style-type: none"> <li>• <b>Attributes:</b> String, Input, NoTrigger</li> <li>• <b>Level&lt;n&gt;:</b> <code>&lt;n&gt;</code> = 0-7</li> </ul>

IA Value	Description
<Level<n>_Filename>	<p>The file name and extension of the file to export. Can consist of hard-coded strings and/or any number of IA Values that resolve into all or portions of a valid file name. In most cases, specify one or more IA Values to create a file name that is unique for each file that is exported, so you do not overwrite existing files.</p> <ul style="list-style-type: none"> <li>• <b>Attributes:</b> String, Input, NoTrigger</li> <li>• <b>Level&lt;n&gt;:</b> &lt;n&gt; = 0-7</li> </ul>
<Level<n>_Processed>	<p>Setting this value to 1 indicates that this node has already been processed (and can be skipped if configured to do so in setup).</p> <ul style="list-style-type: none"> <li>• <b>Attributes:</b> Long, Input, NoTrigger</li> <li>• <b>Level&lt;n&gt;:</b> &lt;n&gt; = 0-7</li> </ul>

### 8.4.2.2 Output IA Values

Output IA Values include output processing variables which store data that is generated by the module during processing. The module does not output any files to the Intelligent Capture Server. There are no File-type output values.

**Table 8-14: Output IA Values**

IA Value	Description
Output values describing output files	
<Level0_DocumentID>	<p>Document ID of the stored document.</p> <ul style="list-style-type: none"> <li>• <b>Attributes:</b> String, Output</li> <li>• <b>Level:</b> 0</li> </ul>
<Level<n>_FullPath>	<p>The fully-resolved path name after evaluating all IA Values and converting them to strings.</p> <ul style="list-style-type: none"> <li>• <b>Attributes:</b> String, Output</li> <li>• <b>Level&lt;n&gt;:</b> &lt;n&gt; = 0-7</li> <li>• <b>Example:</b> &lt;Level3_FullPath as String, Output&gt;</li> </ul>

IA Value	Description
<Level<n>_Action>	<p>This is an integer specifying the output result. Valid values are:</p> <ul style="list-style-type: none"> <li>• 0: Node was not processed</li> <li>• 1: File exists and was skipped without prompting</li> <li>• 2: File exists and was overwritten without prompting</li> <li>• 3: File exists and an error occurred</li> <li>• 4: New file created</li> <li>• 4097: File exists, operator was prompted, and chose skip</li> <li>• 4098: File exists, operator was prompted, and chose overwrite</li> <li>• 4099: File exists, operator was prompted, and chose to log an error.</li> </ul> <p>Attributes are:</p> <ul style="list-style-type: none"> <li>• <b>Attributes:</b> Long, Output</li> <li>• <b>Level&lt;n&gt;:</b> &lt;n&gt; = 0-7</li> <li>• <b>Example:</b> &lt;Level3_Action as Long, Output&gt;</li> </ul>
Output status and error variables	
<ErrorNumber>	<p>The error number of the error, if any, that occurred while processing this task.</p> <ul style="list-style-type: none"> <li>• <b>Attributes:</b> Long, Output</li> <li>• <b>Level:</b> T</li> </ul>
<ErrorText>	<p>The text string of the error, if any, that occurred while processing this page.</p> <ul style="list-style-type: none"> <li>• <b>Attributes:</b> String, Output</li> <li>• <b>Level:</b> T</li> </ul>

IA Value	Description
<ExportResult>	<p>If all documents contained by the task were exported successfully, then this variable is set to zero. Otherwise, this variable contains a negative number indicating the error.</p> <p>You can check this variable in a <b>Finish</b> event handler after export to determine whether any documents require to be exported again. To determine which documents require a re-export, check the &lt;Level&lt;n&gt;_ErrorNumber&gt; and &lt;Level&lt;n&gt;_ErrorText&gt; IA Values for the node where the error occurred.</p> <ul style="list-style-type: none"> <li>• <b>Attributes:</b> Long, Output</li> <li>• <b>Level:</b> T</li> </ul>
<Level<n>_ErrorNumber>	<p>The error number of the error, if any, that occurred while processing this task.</p> <ul style="list-style-type: none"> <li>• <b>Attributes:</b> Long, Output</li> <li>• <b>Level&lt;n&gt;:</b> &lt;n&gt; = 0-7</li> <li>• <b>Example:</b> &lt;Level2_ErrorNumber As Long, Output&gt;</li> </ul>
<Level<n>_ErrorText>	<p>The text string of the error, if any, that occurred while processing this page.</p> <ul style="list-style-type: none"> <li>• <b>Attributes:</b> String, Output</li> <li>• <b>Level&lt;n&gt;:</b> &lt;n&gt; = 0-7</li> <li>• <b>Example:</b> &lt;Level3_ErrorText As String, Output&gt;</li> </ul>
<Level<n>_Processed>	<p>A value that is set to 1 when the level 0 nodes of the task have all been processed.</p> <ul style="list-style-type: none"> <li>• <b>Attributes:</b> Long, Output</li> <li>• <b>Level&lt;n&gt;:</b> &lt;n&gt; = 0-7</li> <li>• <b>Example:</b> &lt;Level6_Processed As Long, Input, Output, NoTrigger&gt;</li> </ul>
Output statistical variables	
<StartTime>	<p>The time at which processing on the current task began. This value is in the long time format of the client system</p> <ul style="list-style-type: none"> <li>• <b>Attributes:</b> String, Output</li> <li>• <b>Level:</b> T</li> </ul>

IA Value	Description
<StartDate>	<p>The date on which processing on the current task began. This value is in the short date format of the client system.</p> <ul style="list-style-type: none"> <li>• <b>Attributes:</b> String, Output</li> <li>• <b>Level:</b> T</li> </ul>
<EndTime>	<p>The time at which processing on the current task completed. This value is in the long time format of the client system.</p> <ul style="list-style-type: none"> <li>• <b>Attributes:</b> String, Output</li> <li>• <b>Level:</b> T</li> </ul>
<EndDate>	<p>The data on which processing on the current task completed. This value is in the short date format of the client system.</p> <ul style="list-style-type: none"> <li>• <b>Attributes:</b> String, Output</li> <li>• <b>Level:</b> T</li> </ul>
<TotalTime>	<p>Total processing time of the current task in milliseconds.</p> <ul style="list-style-type: none"> <li>• <b>Attributes:</b> Long, Output</li> <li>• <b>Level:</b> T</li> </ul>
<Level<n>_StartTime>	<p>The time at which processing on the current page began. This value is in the long time format of the client system.</p> <ul style="list-style-type: none"> <li>• <b>Attributes:</b> String, Output</li> <li>• <b>Level&lt;n&gt;:</b> &lt;n&gt; = 0-7</li> <li>• <b>Example:</b> &lt;Level7_StartTime as String, Output&gt;</li> </ul>
<Level<n>_StartDate>	<p>The date on which processing on the current page began. This value is in the short date format of the client system.</p> <ul style="list-style-type: none"> <li>• <b>Attributes:</b> String, Output</li> <li>• <b>Level&lt;n&gt;:</b> &lt;n&gt; = 0-7</li> <li>• <b>Example:</b> &lt;Level5_StartDate as String, Output&gt;</li> </ul>
<Level<n>_EndTime>	<p>The time at which processing on the current page completed. This value is in the long time format of the client system.</p> <ul style="list-style-type: none"> <li>• <b>Attributes:</b> String, Output</li> <li>• <b>Level&lt;n&gt;:</b> &lt;n&gt; = 0-7</li> <li>• <b>Example:</b> &lt;Level5_EndTime as String, Output&gt;</li> </ul>

IA Value	Description
<Level<n>_EndDate>	<p>The date on which processing on the current page completed. This value is in the short date format of the client system.</p> <ul style="list-style-type: none"> <li>• <b>Attributes:</b> String, Output</li> <li>• <b>Level&lt;n&gt;:</b> &lt;n&gt; = 0-7</li> <li>• <b>Example:</b> &lt;Level6_EndDate as String, Output&gt;</li> </ul>
<Level<n>_TotalTime>	<p>Total processing time of the current page in milliseconds.</p> <ul style="list-style-type: none"> <li>• <b>Attributes:</b> Long, Output</li> <li>• <b>Level:</b> &lt;n&gt; = 0-7</li> <li>• <b>Example:</b> &lt;Level6_Totalltime as Long, Output&gt;</li> </ul>
<Operator>	<p>The user name of the operator who is logged in to the module.</p> <ul style="list-style-type: none"> <li>• <b>Attributes:</b> String, Output</li> <li>• <b>Level:</b> T</li> </ul>



## Chapter 9

# IBM Content Manager for Multiplatforms Compatible Advanced Export

This section includes the Intelligent Capture specialized enterprise export module: **ecpcore-cxi**.

The *Intelligent Capture Release Notes* (available in My Support (<https://support.opentext.com/>)) contains a list of supported versions of DB2 Content Manager that are compatible with Export for IBM Content Manager.

For information about common features and functionalities in the Intelligent Capture client modules, see *OpenText Intelligent Capture - Module Reference (ECPCORE-CMD)*.

## 9.1 Features

The Export for IBM Content Manager module can connect simultaneously to one or more DB2 Content Manager library servers to export Intelligent Capture image data, non-image data, and index data by integrating with the Content Manager client software for Microsoft Windows.

- **Exports data to the Content Manager system:** Enables simultaneous connection to one or more Content Manager library servers, and the ability to specify the storage location of exported documents.
- **Creates item definitions and establishes item export relationships:** Enables arrangement of the item definitions in the export list to specify when to export new content, and determine where it is stored.
- **Adds new parts to existing items:** Enables specification of a query that can search for existing content within the Content Manager system and manage results.
- **Exports image data and non-image data:** Enables conversion of the images it exports into various file types, color formats, and compression settings. Enables the export of non-image data without attempting to perform file conversion.
- **Enables specification of MIME types:** Enables *MIME* type specification for export of image and non-image data. MIME types are created and managed by using Content Manager system administration client.
- **Applies specified access control to exported content:** Enables the options of applying a default Access Control List (*ACL*) to new items or selecting a predefined ACL to apply to all new and modified items.
- **Associates attributes with exported content:** Provides the ability to associate attributes with exported content. Attributes are useful for locating previously stored items

- **Associates new items using links and/or references:** Provides association between exported documents and parent relationships, or association with an existing item found via query. Other specifications include adding a specific type of link and/or assigning a specified reference attribute.
- **Links existing objects to multiple folders:** Enables links that reference existing documents, so a single link to a document or folder can exist in multiple folders without being physically copied.
- **Versioning:** Increments the Content Manager version numbers both for items it modifies and for items to which it adds links or references.
- **Enables workbasket creation and initiates document routing:** Provides document routing and the ability to define a document routing process in a workbasket.
- **Uses IA Values to control many module settings:** Enables population of IA Values with data such as dates, times, image characteristics, operator names, and other attributes. This feature helps to configure export parameters and reduce *IPP* modification.

## 9.2 Setting Up IBM Content Manager for Multiplatforms Compatible Advanced Export

Most configuration information for Intelligent Capture client modules is defined during *module setup*. You can run a module in setup mode from Intelligent Capture Designer, from Intelligent Capture Administrator, or from a command prompt with appropriate arguments. For more information, see *OpenText Intelligent Capture - Module Reference (ECPCORE-CMD)*.

When launched in setup mode, a client module displays the **Setup** window in which you can specify the module's configuration settings.

### 9.2.1 Migrating to Export for IBM CM

The *Release Notes* contains a list of supported versions of DB2 Content Manager that are compatible with Export for IBM CM. If you have been using an earlier Content Manager system that used the IBM Content Manager Compatible Export module, perform the following steps:

1. Install new licenses for the Export for IBM CM module. To install new licenses, use the Intelligent Capture Administrator module. The *Administration Guide* contains detailed instructions.
2. Make a list of steps for each of your existing processes.
3. Design a new *IPP* to accomplish the equivalent functions of each of your existing processes:
  - a. Change your error handling. Earlier custom export modules always returned Success and so required handling of errors in the Finish event

handler in your IPP. Export for IBM CM additionally triggers the Error event, but only when a task finishes with a Failure status. A failure status occurs if an error occurs that prevents the remaining pages in the task from exporting. The module can still finish with Success after an error provided it can process the rest of the pages in the task. Update your IPP to include both Error and Finish event handlers.

Compile your process.

- b. Change all affected step names to reflect the usage of the new module.
- c. Remove extra steps of the export module. If you were previously using multiple steps of the module to export multiple file types, then remove the extra steps. You can now export multiple files with a single step by creating an item definition for each file type.



**Note:** When you recompile, change the IPP name to reflect the different modules used within the process.

4. Install the newly compiled process in the Intelligent Capture Server.
5. Configure Export for IBM CM for setup. To proceed, complete all necessary setup steps.
6. Thoroughly test your new configuration before putting the system into production.

## 9.2.2 Logging in to the Repository System for Setup

To set up the custom export module, the module must connect to the repository system and log in using an established session account. The connection you make must be the one you want this step of the export module to use. Follow these steps:

### To log in to the repository system:

1. Run Export for IBM CM for setup, and the **Export for IBM CM Setup** window displays.
2. If the module is inactive, then select the **Logon** tab.
3. Note the **Connection Status** information at the bottom of the tab. The status shows one of the following:
  - If it shows **Connected to server\_name as user\_ID**, then the module is already logged in with the credentials indicated. If this connection is valid for setting up the current module step, perform other setup tasks described in this section. When finished, click **OK** to save these settings and exit setup.
  - If it shows **Connected to server\_name as user\_ID** but the connection is not valid for setting up the current module step, click **Disconnect**.
  - If it shows **Not connected**, then the module is not logged in. Continue to step 4.

4. Complete the following fields:
  - *Server*: Select the repository server to which you want to connect. The list of servers available to the module is configured during installation of the repository client software.
  - *User*: Type a valid user ID for the selected repository server.
  - *Password*: Type a valid password.
5. Click **Connect**. If the module is able to connect to the repository server, the **Connection Status** field shows the connection information. If the module is not able to connect, then repeat these steps selecting a different server or supplying different connection credentials.
6. Perform other setup tasks described in this section, then click **OK** to save your settings and exit setup mode.

### 9.2.3 Working with Items and Item Definitions

Item definitions reference or create item types in the Content Manager system during production and specify the type of content to store. Item definitions are created in the **Edit Definition** window. Item definitions characterize an item or the entities related to it, such as name, category, and whether to search for existing items before storing new ones. Item definitions are templates defined and stored in a module instance.

Item definitions are used when creating export lists. Export lists specify the parent-child relationship among item definitions. For example, a hierarchy can specify that a *TIFF* image item exists within a Document item, and that the Document exists within a Folder item. The Folder item can be a root component, meaning that it has no parent in the Content Manager system. Each time a new Folder item occurs, Export for IBM CM would start putting new documents in it. Each time a new Document item occurs, the module would start storing TIFF images within it. This arrangement of the item definitions specifies when Export for IBM CM exports new content, and determines where the content is stored, depending on how links and references are configured.

An item type is a template for defining and later locating similar items. An item is a step of an item type. For example, an item can be a folder, document, video, or image.

### 9.2.3.1 Applying Access Control Levels to Exported Content

Access Control Levels (*ACL*) are created and managed using the Content Manager system administration client. After definition, ACLs appear in the **Item** tab of the **Edit Definition** window during Export for IBM CM setup. By utilizing the ACLs, the Intelligent Capture administrator can control access to new or modified content for one or more users or user groups.

Export for IBM CM enables the Intelligent Capture administrator to either:

- Apply a default access control list (ACL) to new items and maintain the existing ACL for modified items, or
- Select a predefined ACL to apply to all new and modified items.

#### To specify ACLs to apply to an item definition:

1. Communicate with your Content Manager administrator and make sure the ACLs have been defined.
2. Run Export for IBM CM for setup. The **Export for IBM CM Setup** window displays.
3. Establish a connection with a Content Manager library server using the **Logon** tab.
4. Select the **Export** tab.
5. Select the item definitions from the **Definition Set** and click **Edit**. If no existing item definition meets your needs, click **Create**. For either of these options, the **Edit Definition** window displays.
6. Select the **Item** tab and then select the **Set ACL for all items that are created or modified to:** check box.
7. Select the ACL from the list box. If you are using an IA Value that resolves to the name of an ACL during production, click the **Browse** button and the **Choose Value** window is displayed. Select the IA Value from the list and click **OK**.
8. Click **OK** in the **Edit Definition** window box and the ACL is applied to the selected or newly created definition.

### 9.2.3.2 Assigning Item Attributes

Attributes describe certain characteristics or properties of an item (for example, name, address, or age). Attributes are created and managed by your Content Manager administrator. After definition, attributes appear on the **Attributes** tab of the **Edit Definition** window. The Intelligent Capture administrator can associate these attributes with exported content. Attributes enable Content Manager users to locate items based on the values assigned to them.

**To select attributes for an item definition and assign values to them:**

1. Edit an existing item definition or create one. For more information, see [“Creating, Editing and Deleting Items, Documents, Document Parts, or Child Components”](#) on page 225.
2. Select the **Attributes** tab of the **Edit Definition** window.
3. Select the check box for each attribute you want to assign to the current item definition.
4. To edit an attribute value, select the name and then click the name again.
5. In the **Value** field, type an appropriate value. Type plain text in the field, or specify *MDF* and non-MDF values that resolve to an appropriate value when the batch is processed in production mode. To specify an MDF value, click the **Browse** button to display the **Choose Value** window.
6. Repeat the steps as necessary for each attribute you assign.
7. Click **OK** to save your settings and close the **Edit Definition** window.



**Note:** When setting up a date attributes, use the format <YYYY-MM-DD> or the export fails. If no attributes are defined for the selected item definition, the list box in **Attributes** tab is blank.

#### Related Topics

[“Creating, Editing and Deleting Items, Documents, Document Parts, or Child Components”](#) on page 225

[“Creating and Editing Item Export Relationships”](#) on page 226

[“Deleting Item Export Relationships”](#) on page 228

[“Searching for and Modifying Existing Content”](#) on page 230

[“Specifying Object Properties”](#) on page 231

### 9.2.3.3 Creating, Editing and Deleting Items, Documents, Document Parts, or Child Components

The process for creating, editing, and deleting definitions for items, reference items, documents, document parts or child components is essentially the same for all.

**To create, edit, or delete item definitions:**

1. Run Export for IBM CM for setup. The **Export for IBM CM Setup window** displays.
2. Select the **Export** tab. From the **Definition Set** list box, either:
  - Click the **Create** button to create a definition, and the **Edit Definition** window displays.
  - Select an existing definition and click the **Edit** button to edit the selected definition. The **Edit Definition** window displays.
  - Select an existing definition and click the **Delete** button to remove the selected definition from the list box. If you are only deleting definitions, you can click **OK** and exit the setup window.
3. If you are creating or editing a definition, click the **Item** tab and type an item definition name in the **Definition Name** field.
4. From the **Category** list box, select **Item, Document, Document Part, Child Component, or Resource Item**.
5. From the **Part Type** list box, select the item type. Select one of the item types from the list box. If the existing item types do not meet your needs, then use the Content Manager system administration client to define new ones.
6. Select a semantic type from the **Semantic Type** list box. To use an IA Value that during production resolves to a valid semantic type, click the **Browse** button to display the **Choose Value** window. In this window, select the appropriate IA Value. Specify a semantic type. If the existing semantic types do not meet your needs, then use Content Manager system administration client to define new ones.
7. Under **Searching**, specify the search criteria that locates and modifies existing content.
8. Specify **ACL** settings:
  - To apply the default ACL for new items or use the existing ACL for modified items, clear the **Set ACL for all items that are created or modified to** check box.
  - To specify an ACL for all new and modified items, select the **Set ACL for all items that are created or modified to** check box, then select the ACL from the list box. If you are using an IA Value that resolves to the name of an ACL during production, **Browse** to select the IA Value in the **Choose Value** window.

9. Use the controls on the **Attributes**, **Routing**, and **Add** tabs to specify item attributes, enable document routing, and specify item associations.



**Note:** If the existing ACLs do not provide the level of access control, then use the Content Manager system administration client to define new ones.

## Related Topics

[“Assigning Item Attributes” on page 224](#)

[“Creating and Editing Item Export Relationships” on page 226](#)

[“Deleting Item Export Relationships” on page 228](#)

[“Searching for and Modifying Existing Content” on page 230](#)

[“Specifying Object Properties” on page 231](#)

### 9.2.3.4 Creating and Editing Item Export Relationships

After creating item definitions, establish the relationships that will export instances of these items to the Content Manager system.

#### To define item export relationships:

1. Run Export for IBM CM for setup. The **Export for IBM CM Setup** window displays.
2. Click the **Export** tab.
3. In the **Export List**, edit or delete existing relationships to achieve the export behavior.
4. To insert a new relationship, select the row in the **Export List** where you want to insert the new relationship, then select **Insert**. If you select an existing row, that row and the rows following it are moved down to make room for the new row. The new row is in edit mode, ready for you to define a new relationship.



**Note:** Carefully insert the new export item relationship in the correct hierarchical position. The relationship cannot be moved up or down in the list after it is inserted. Instead, misplaced relationships must be deleted, and a new row inserted in the correct position.

5. Specify a name for the item export relationship. The name can be a combination of text you type and any IA Values. **Browse** to select an IA Value defined in any of the **MDFs** of modules included in your process or batch, or type the name of any non-MDF IA Value.
6. Specify an item definition for the item export relationship. The definition you specify can be a combination of text you type and any IA Values. You can select an item definition by selecting to expand the list and selecting one of the item


definitions. The value you specify in the **Definition** field must resolve to a single item definition name as listed in the **Definition Set**


7. Position the item export relationships according to the hierarchy you want. The indent level of each export item relationship defines its relationship to other relationships in the **Export List**. Relationships are ancestors of the indented relationships following them. Relationships with the same parent are siblings of other relationships that have the same level of indent.
8. Click **OK** to save your settings and exit setup.




**Note:** Use the left and right buttons to move item export relationships, adjusting their relationship to other relationships. The left and right buttons become inactive when moving a relationship would result in an invalid condition.

In most cases, the module automatically guides you through creating valid relationships. The relationship definition rows of valid relationships show a

**Valid Relationship** icon () . If the module cannot determine whether a relationship is valid (for example, by using IA Values in the relationship definition, which are not evaluated until the module is run in production mode), then that relationship definition row displays an **Unknown**

**Relationship** icon () . If you define an invalid relationship (for example, placing a folder inside an item that cannot hold a folder or deleting the parent of one or more relationships), then that relationship definition row displays an

**Invalid Relationship** icon () . The relationships you establish in the **Export List** determine the circumstances within which the module searches for items and when it creates new items for export. By default, these relationships also determine where items are stored in the Content Manager system; that is, how they are linked to or referenced by existing items. However, the item definition ultimately determines where new items of a given type are stored and how they are linked to or referenced by other items. You can change the default behavior by using the settings in the **Add** tab of the **Item Definition** window.

## Related Topic

[“Deleting Item Export Relationships” on page 228](#)



### 9.2.3.5 Deleting Item Export Relationships

#### To delete item export relationships:


1. Run Export for IBM CM for setup. The **Export for IBM CM Setup window** displays.
2. Select the **Export** tab.
3. Select the row you want to delete.
4. Reposition the remaining item export relationships according to the hierarchy you want. The indent level of each export item relationship defines its relationship to other relationships in the **Export List**. Relationships are ancestors of the indented relationships following them. Relationships with the same parent are siblings of other relationships that have the same level of indent.
5. Click **OK** to save your settings and exit setup mode.



**Note:** Use the left and right buttons to move item export relationships left and right, adjusting their relationship to other relationships. The left and right buttons become inactive when moving a relationship would result in an invalid condition.

Deleting rows in the **Export List** can leave other rows in an invalid state. The relationship definition rows of valid relationships show a **Valid Relationship** icon (). If the module cannot determine whether a relationship is valid (for example, by using IA Values in the relationship definition, which are not evaluated until the module is run in production mode), then that relationship definition row displays an **Unknown Relationship** icon (.

If an invalid relationship results (for example, by deleting the parent of one or more relationships), then the invalid relationship definition row displays an

**Invalid Relationship** icon (.

#### Related Topic

[“Creating and Editing Item Export Relationships” on page 226](#)

### 9.2.3.6 Enabling Version Control

Versioning (also known as version control) is the ability to store and maintain multiple versions of an item, including versions of the child components of the item. For items that support manual versioning, Export for IBM CM can increment the Content Manager version numbers both for items it modifies and for items to which it adds links or references.

While setting up the module, the Intelligent Capture administrator can specify whether to increment the version number of items that support manual versioning.

#### To enable version control:

1. **Create a new item definition or edit an existing one.**
2. On the **Item** tab of the **Edit Definition** window, select the **Search for items to modify using the query** option from the **Search** section, and specify the search criteria and operations to perform when items are found.
3. Select the **Increment version number when modifying existing items that support manual versioning** check box. During production, if your search query finds existing items that are configured to support manual versioning, the module increments the version number of the object.

#### Related Topics

[“Searching for and Modifying Existing Content” on page 230](#)

### 9.2.3.7 Exporting Multiple Item Types from a Single Module Step

You can export multiple item types from a single step of the Export for IBM CM module. To export multiple item types, set up an item definition for each item type to export.

#### To export multiple item types from a single module step:

1. **Create an item definition** that establishes the items and hierarchy you want to export. For example, you can define folders, and within those folders, documents, and within those documents, the individual pages of the document that is exported. Your definition set can look like the following, using names and item types that have been defined in your Content Manager system:

**Table 9-1: Definition Set Examples**

Name	Item Type	Uses Parent
Provider Folder	PC_ProvidFolder	No
Agreement	PC_Agreement	Yes
Agreement_2	ICMBASE	Yes
W9	PC_W9	Yes

Name	Item Type	Uses Parent
W9_2	ICMBASE	Yes



**Note:** In this example, Agreement and W9 define documents, and Agreement\_2 and W9\_2 define the individual pages within those documents. Provider Folder is the folder object that holds all of these items.

In this example, all documents are exported to a single folder type. You can easily set up the step to export to multiple folder types.

- Define any IA Values to specify which definitions to use for a particular task. In the previous example, you can define an IA Value named `<Custom.Document_Type>` to indicate that the Agreement or W9 item types are used, and another IA Value named `<Custom.Document_2_Type>` to indicate that Agreement\_2 or W9\_2 item types are used. Some part of your process must set these IA Values appropriately for each case.
- Configure the **Export List** to suit the hierarchy of your document by inserting and rearranging your item types as necessary. In this example, you can set up the following export list:

**Table 9-2: Export List Example**

Name	Definition
@(Custom.Provider_Number)@(Custom.Provider_Code)	Provider Folder
@1	<@(Custom.Document_Type)>
Pages	<@(Custom.Document_2_Type)>

- Set up each of the items you defined earlier with appropriate **Attributes**, **Routing**, and **Item Associations** from the **Edit Definition** window.

### 9.2.3.8 Searching for and Modifying Existing Content

Export for IBM CM can search for existing content in the Content Manager system.

**To search for content and define what to do if content is or is not found:**

- Create or edit an item definition** in which you want to search for existing content, then open it for editing.
- Select the **Item** tab of the **Edit Definition** window.
- Under **Searching**, select **Search for items to modify** using this query.
- In the **Search** field, specify the query string.
- Specify what to do if the query finds more than one item. Under **If more than one item is found**, select the option:

- **Modify all items found:** Modify every item found by your search with the new data in this item definition.
  - **Modify only the first item found:** Modify only the first item found by your search with the new data in this item definition.
  - **Report an error:** Generate an error that is handled according to the error handling setup specified in the **Errors** tab.
6. Specify what to do if the search query does not find any items. Under **If no items found**, select the option:
    - **Create a new item:** Create an item with the data in this item definition.
    - **Report an error:** Generate an error that is handled according to the error handling setup specified in the **Errors** tab.
  7. Enable version control. If your search query finds existing items that are configured to support manual versioning, select the **Increment version number when modifying existing items that support manual versioning** check box to increment the version number of the object. Otherwise, clear this check box.
  8. Perform other setup tasks, then click **OK** to save your settings and exit setup.



**Note:** Specify a query in the format, `/itemtype[@attribute_name="value"]`.

If the batch you are setting up contains an IA Value that during production resolves to a valid portion of a query string, type that IA Value in the search field. Alternatively, you can select the **Browse** button to display the **Choose Value** window, then select the appropriate IA Value, or specify non-*MDF* IA Values.

The IBM Content Manager for Multiplatforms documentation contains details on constructing queries into the Content Manager system.

## Related Topics

[“Enabling Version Control” on page 229](#)

### 9.2.3.9 Specifying Object Properties

Document parts and resource items are objects. When your item definition specifies either of these item types, the **Edit Definition** window includes an **Objects** tab. (Other item categories do not have object properties.) The **Objects** tab is where you specify the file type, color format, compression, *MIME* type, and other properties of the objects that the module exports from this instance.

#### To specify object properties for an item definition:

1. **Edit an existing item definition or create one.** Be sure the **Item** tab of the **Edit Definition** window specifies a **Category** of **Document Part** or **Resource Item**.
2. Select the **Objects** tab of the **Edit Definition** window.

3. Retrieve existing content for modification by selecting the **If the item being processed already has content then copy that content to this file on the InputAccel Server** check box, then select the IA Value from the dropdown list. Existing content is retrieved from the Content Manager system and stored as a stage file on the Intelligent Capture Server.
4. If want current item definition to export an object created by this item definition, select the **Add a new object to the item(s) being processed** check box. If you are adding a new object, specify the **Object Source** settings and select the MIME type from the **MIME Type** list box. MIME types can be added and managed by using Content Manager system administration client.
5. Click **OK** to save your settings and exit setup.

### Related Topics

[“Assigning Item Attributes” on page 224](#)

[“Searching for and Modifying Existing Content” on page 230](#)

## 9.2.4 Understanding Document Routing and Workbaskets

Document routing is a work management tool within the Content Manager system. This tool is used to direct documents from one user to another based on administrator-defined work steps, rules, and *ACLs* collectively called a routing process. When defining item types for a step of Export for IBM CM, the Intelligent Capture administrator can enable document routing.

For each item definition that has routing enabled, the Intelligent Capture administrator selects:

- A routing process name
- A routing priority
- A routing process owner

A routing priority is a number that specifies the order in which routed items appear in a user worklist. A worklist is a collection of work items, documents, or folders that are assigned to a user. A routing process owner is the Content Manager user ID of the user who owns the workbasket. A workbasket is a collection of documents or folders that are either in process or waiting to be processed, and the rules that govern the presentation, status, and security of its contents.

Routing processes and routing process owners (Content Manager users) are created and managed by using Content Manager system administration client. After being defined, routing processes and routing process owners appear in lists in the **Routing** tab of the **Edit Definition** window box when running Export for IBM CM in setup mode.

### 9.2.4.1 Enabling Document Routing

Document routing is a work management tool that you use to direct documents from one user to another. When the Export for IBM CM module exports an item, it can trigger a Content Manager routing process, which causes the exported item to enter a routing queue. You can enable document routing for any item category except a child component or a document part.

**To enable document routing for content produced by an item definition:**

1. **Edit an existing item definition or create one.** Be sure the **Item** tab of the **Edit Definition** window does not specify a **Category of Child Component**.
2. Select the **Routing** tab of the **Edit Definition** window.
3. Select the **Enable document routing for this item** check box. The other controls in the tab become available.
4. In the **Process Name** field, select the routing process from this list box. If you are using an IA Value that resolves to a process name during production, **Browse** to display the **Choose Value** window and select that value. If the existing document routing processes do not meet your needs, you can use the Content Manager system administration client to add, manage, and remove them.
5. In the **Priority** field, specify the relative priority for items added to the document routing process. Lower numbers indicate higher priority. If you are using an IA Value that during production resolves to a priority value, **Browse** to display the **Choose Value** window and select that value.
6. In the **Owner** field, specify a process owner (the user to be assigned as owner of the document routing process). If you are using an IA Value that resolves to an owner name during production, then browse to display the **Choose Value** window and select that value.
7. Select the **Don't reroute items already in progress** check box if you do not want to add the current item if it exists in the workbasket..
8. Click **OK** to save your settings and close the **Edit Definition** window.

### 9.2.5 Understanding Item Links and References

Link types and reference attributes are created and managed by your Content Manager administrator. After being defined, links and reference attributes appear as **Add methods** on the **Add** tab of the **Edit Definition** window.

- A link is a directional relationship between two items in the Content Manager system: a parent and a child. You can use a set of links to model one-to-many associations. The most common type of link associates a folder with the documents it contains.
- A reference attribute is a pointer to specific information contained in another item, establishing a reference to that item. A reference is a single direction, one-

to-one association between a root or child component and another root component.

During setup, the Intelligent Capture administrator can decide to associate exported items using one or both of the following options:

- Based on **Export List** definitions created using the **Export** tab.
- With an existing item that has been found by specifying a query. For instructions, see *“Searching for and Modifying Existing Content”* on page 230.

When an item has no parent as defined on the **Export List**, you can specify not to use either of the options.

By making the appropriate choices, it is possible to export content with items that are not specified in the **Export List**. When set up this way, the export list determines when items are exported but not where they are stored.

### 9.2.5.1 Associating Items Using Links, References, or both

Export for IBM CM enables you to associate items using links or references. This feature lets you organize your documents with greater flexibility and even allows a single document or folder to exist in more than one folder without being physically copied.

#### To associate objects using links or references:

1. Run Export for IBM CM for setup. The **Export for IBM CM Setup** window displays.
2. Establish a connection with a Content Manager library server from the **Logon** tab.
3. Select the **Export** tab of the **Export for IBM CM Setup** window.
4. Select the item definitions from the **Definition Set** and click **Edit**. If no existing item definition meets your needs, click **Create**. For either of these options, the **Edit Definition** window displays.
5. Select the **Add** tab.
6. To associate this item definition with its parent, then select the **Add this item to its parent in the export list** check box.
7. To associate this item definition with existing content, then select the **Add this item to items found by this query** check box and specify the search parameters.
8. Specify the **Add methods**, and click **OK** to save the settings.




**Note:** Because item definitions are reusable templates from which items are created, you need only one item definition of a given configuration.

## 9.2.6 Working with Password Encryption

Passwords cannot be encrypted from Export for IBM CM, but you can leverage the security features of DB2 to do so.


For example, you can set the server authentication type to `SERVER_ENCRYPT` to have encrypted passwords sent over the network. Explicitly specify `AUTHENTICATION` as `SERVER_ENCRYPT` for the remote library server in `cmbicmsrvs.ini`. You can manually edit this file or follow the INI file modification steps provided by IBM.

 **Note:** The IBM Authentication note (<http://publib.boulder.ibm.com/infocenter/db2luw/v8/topic/com.ibm.db2.udb.doc/admin/r0000294.htm?resultof=%22%61%75%74%68%65%6e%74%69%63%61%74%69%6f%6e%22%20%22%61%75%74%68%65%6e%74%22%20>) provides more information on this subject.

## 9.3 Running IBM Content Manager for Multiplatforms Compatible Advanced Export in Production

After the module has been set up, tested, and placed in a production environment, operators and administrators will run the module in production.

For information related to common production tasks for unattended modules, see *Running Modules in Production Mode* in the *OpenText Intelligent Capture - Module Reference (ECPCORE-CMD)* guide.

 **Note:** The *Running Modules in Production Mode* section contains production topics that are common to many unattended modules and may not apply to this module.


### 9.3.1 Logging in to the Content Manager System

Tasks carry login information when routed to their intended Content Manager library server. The login information can include the server name only, or can specify a **user ID** and **password** for automatic login.

If automatic login was not specified during setup, then during production the module can:

- Log in automatically with the `-autostart` command line parameter
- Prompt the operator for the necessary login information in the **Content Manager - Connect** window
- Report an error, according to how error handling is configured

If the operator has already established the session the task needs, then Export for IBM CM silently exports the task.

 **Note:** Operator-initiated connections are persistent; they remain active until the operator manually disconnects or exits the module.

If automatic login was specified during module step setup, then during production mode the module automatically connects to the specified library server and exports the task.

In addition to specifying automatic login, the Intelligent Capture administrator can configure the module so that during production mode it logs in and logs out in various ways. Export for IBM CM can be configured to log in as necessary (when a suitable connection does not exist) and disconnect when:

- the current task finishes
- a task with different login information is received
- the module exits

Logging in to a library server each time a task requires a connection can be expensive in terms of the time required to complete the connection. Conversely, keeping a number of connections open continuously is expensive in terms of the number of available Content Manager licenses. The various automatic and manual, temporary and persistent, login choices enable you to balance your performance needs with your licensing and security requirements.

## 9.4 Reference—IBM Content Manager for Multiplatforms Compatible Advanced Export

The topics within this section contain reference information useful while using the application in setup or production. The topics provide details you will need when setting up the Export for IBM CM module or when configuring an *IPP*.

### 9.4.1 Windows

The topics within this section provide descriptions of windows accessible from the application. The topics list the user interface element name and include a brief description of actions available from the window.

### 9.4.1.1 Content Manager - Connect

If you did not specify login information for your batches, you can establish sessions from the **Content Manager - Connect** window.

If all your tasks have saved login information, then click **OK** in this window to open the production window.

**Table 9-3: Content Manager - Connect Window**

Element	Description
Server	Select or type the name of the repository server in this field.
User name	The user name applied when the module receives a task from this instance.
Password	Enables the specified user to access the repository server when a task from this module step is received.
Connect	The <b>Connect</b> button is activated when you select the <b>Use Windows Login</b> check box, or you specify the <b>User Name</b> and <b>Password</b> for logon. This connects you to the repository server.
You will remain connected to the following sessions until the module exits	Indicates the current sessions to which you are connected.
Disconnect	Disconnects from the selected session.

### 9.4.1.2 Edit Definition

The **Edit Definition** window is where you create a set of item definitions to characterize an item or the entities related to it. The set of definitions are displayed on the **Export** tab of the **Export for IBM CM Setup** window. You display the **Edit Definition** window by clicking the **Create** or **Edit** buttons on the **Export** tab.

The tabs that appear in the **Edit Definition** window vary depending on the **Category** selected on the **Item** tab.

**Table 9-4: Edit Definition Window**

Element	Description
Item tab	The <b>Item</b> tab is available for all categories.
Attributes tab	<b>Attributes</b> tab is available for all categories.
Routing tab	The <b>Routing</b> tab is only available for the <b>Document</b> , <b>Item</b> , and <b>Resource Item</b> categories.

Element	Description
Objects tab	The <b>Objects</b> tab is only available for the <b>Document Part</b> and <b>Resource Item</b> categories.
Add tab	The <b>Add</b> tab is only available for the <b>Document</b> , <b>Item</b> , and <b>Resource Item</b> categories.

**9.4.1.2.1 Item tab**

The **Item** tab of the **Edit Definition** window specifies the basic properties of the item definition, such as the name of the definition, its category, and whether to search for existing items before storing new ones.

For item definitions, you must at least:

- Specify a **Definition Name**
- Select one of five **Categories**
- Select a **Document Type**, **Part Type**, or **Item Type** if you selected one of those categories
- Specify a **Semantic Type** for the categories that require one.

**Table 9-5: Item tab**

Element	Description
Definition Name	Type a name for this item definition. This is the name that will appear in the <b>Definition Set</b> and <b>Export</b> list box on the <b>Export</b> tab of the <b>Export for IBM CM Setup</b> window.

Element	Description
Category	<p>From the <b>Category</b> list box, you can choose <b>Document</b>, <b>Document Part</b>, <b>Child Component</b>, <b>Item</b>, or <b>Resource Item</b>. As you change these selections, different tabs will appear in the <b>Edit Definition</b> window.</p> <ul style="list-style-type: none"><li>• <b>Item Type</b>, <b>Document Type</b>, <b>Part Type</b>, or <b>Component Name</b> - Select the name or item from the list box. You must choose one of the component names from the list box. If the existing component names do not meet your needs, you can use Content Manager's system administration client to define new ones.</li><li>• <b>Semantic Type</b>: Choose a semantic type from the <b>Semantic Type</b> list box. Alternatively if you are using an IA Value that during production will resolve to a valid semantic type, click the <b>Browse</b> button to display the <b>Choose Value</b> window, then choose the appropriate IA Value. This option is not available for the document part and child component categories.</li></ul>

Element	Description
<p><b>Searching</b></p>	<p>This is optional and will specify the search criteria used to locate and modify existing content.</p> <ul style="list-style-type: none"> <li>• <b>Don't search; always create an item:</b> Select this option if you do not want to perform a search and always want to create an item.</li> <li>• <b>Search for items to modify using this query:</b> If the batch you are setting up contains an IA Value that during production will resolve to a valid portion of a query string, you can enter that IA Value in the search field. Alternatively, you can click the browse button to display the <b>Choose Value</b> window, then choose the appropriate IA Value, or you can specify non-<i>MDF</i> IA Values. The <i>IBM Content Manager for Multiplatforms</i> documentation contains details on constructing queries into the Content Manager system.</li> <li>• <b>If more than one item found:</b> Select one of the following options:             <ul style="list-style-type: none"> <li>– <b>Modify all items found:</b> Modify all items found with the specified search criteria.</li> <li>– <b>Modify only the first item found:</b> Modify only the first item found by your search with the new data in this item definition. Subsequent items are not modified.</li> <li>– <b>Report an error:</b> Generate an error to be handled according to the error handling setup specified in the <b>Errors</b> tab.</li> </ul> </li> <li>• <b>If no items are found:</b> Choose the option:             <ul style="list-style-type: none"> <li>– <b>Report an error:</b> Generate an error to be handled according to the error handling setup specified in the <b>Errors</b> tab.</li> <li>– <b>Create a new item:</b> Create a new item with the data in this item definition.</li> <li>– <b>Increment version number when modifying existing items that support manual versioning:</b> If your search query finds existing items that are configured to support manual versioning, select this check box if you want the module to increment the</li> </ul> </li> </ul>

Element	Description
	<p>object's version number. Otherwise, clear this check box.</p> <ul style="list-style-type: none"> <li>– <b>Delete preexisting Document Parts from found documents</b></li> </ul>
<p><b>Set ACL for all items that are created or modified to:</b></p>	<p>Select this check box if you want to specify an Access Control Level (<i>ACL</i>) for all new and modified items. The specified ACL will define operator access and operations for the items.</p> <ul style="list-style-type: none"> <li>• Clear the check box to use the default ACL for all new items, or the existing ACL for modified items.</li> <li>• Enable the check box to set the ACL for all items by selecting the ACL from the list box.</li> <li>• If you are using an IA Value that during production will resolve to the name of an ACL, click the <b>Browse</b> button to display the <b>Choose Value</b> window, then choose the appropriate IA Value.</li> <li>• If the existing ACLs do not provide the level of access control, use Content Manager's system administration client to define new ones.</li> </ul>

#### 9.4.1.2.2 Attributes tab

Attributes enable Content Manager users to locate items based on the values assigned to them. Attributes are created and managed by using Content Manager system administration client. After being defined, attributes appear on the **Attributes** tab of the **Edit Definition** window. If no attributes have been assigned, none are listed on this tab.

**Table 9-6: Attributes tab**

Element	Description
<p><b>Add this item to its parent in the export list</b></p>	<p>Enable this check box to associate the items this item definition creates with the parent item in the hierarchy specified in the <b>Export List</b>.</p>

Element	Description
<p><b>Add this item to items found by this query</b></p>	<p>Type a query in this field in the format, / itemtype[@attribute_name="value"]. If the batch you are setting up contains an IA Value that during production will resolve to a valid portion of a query string, you can enter that IA Value in the search field. Alternatively, you can click the <b>Browse</b> button to display the <b>Choose Value</b> window, then choose the appropriate IA Value, or you can specify non-<i>MDF</i> IA Values.</p>
<p><b>If more than one item found</b></p>	<ul style="list-style-type: none"> <li>• <b>Modify all items found:</b> Modify every item your search finds by associating the new data in this item definition with it.</li> <li>• <b>Modify only the first item found:</b> Modify only the first item your query finds by associating the new data in this item definition with it. Subsequent items are not modified.</li> <li>• <b>Report an error:</b> Generate an error to be handled according to the error handling setup specified in the <b>Errors</b> tab.</li> </ul>
<p><b>If no items found</b></p>	<ul style="list-style-type: none"> <li>• <b>Don't link:</b> Continue without generating an error; do not create a link.</li> <li>• <b>Report an error:</b> Generate an error to be handled according to the error handling setup specified in the <b>Errors</b> tab.</li> </ul>
<p><b>Increment version number of the found items that support manual versioning</b></p>	<p>Select this check box to cause the module to increment the linked object's version number when the query finds existing items that are configured to support manual versioning. Otherwise, clear this check box.</p>

Element	Description
Add methods	<ul style="list-style-type: none"> <li>• <b>Add as a link of this type:</b> Select this check box to link to the items specified above, then select the link type from the list box. If you are using an IA Value that during production will resolve to the name of a link type, click the <b>Browse</b> button to display the <b>Choose Value</b> window, then choose that value.</li> <li>• <b>Assign this item to the following reference attribute contained in the item specified above:</b> Select this check box if you want to create a reference to the items specified above, then select the reference attribute from the list box. If you are using an IA Value that during production will resolve to the name of a reference attribute, click the <b>Browse</b> button to display the <b>Choose Value</b> window, then choose that value.</li> </ul> <p>When setting up an attribute for the date, you must use the format &lt;YYYY-MM-DD&gt; or the export will fail.</p>
OK	Click to save your settings and close the <b>Edit Definition</b> window.
Cancel	Click to close the <b>Edit Definition</b> window without saving any settings.

### 9.4.1.2.3 Routing tab

The **Routing** tab is displayed on the **Edit Definition** window. Document routing directs documents from one user to another. When the Export for IBM CM module exports an item, it can trigger a Content Manager routing process, which causes the exported item to enter a routing queue.

This tab is only available for these categories specified on the **Item** tab:

- **Document**
- **Item**
- **Resource Item**

**Table 9-7: Routing tab**

Element	Description
Enable document routing for this item	<p>Select this check box to enable document routing and making the routing options available.</p> <ul style="list-style-type: none"> <li>• <b>Process Name:</b> Specify the process name. If you are using an IA Value that will resolve to a process name during production, then select the browse button to display the Choose Value window and select that value.</li> <li>• <b>Priority:</b> Specifies the relative priority for items added to the document routing process. Lower numbers indicate higher priority. A process with a priority of 20 will be routed before a process with a priority of 50.</li> <li>• <b>Owner:</b> Specify a process owner (the user to be assigned as owner of the document routing process). If you are using an IA Value that will resolve to an owner name during production, then select the <b>Browse</b> button to display the <b>Choose Value</b> window and select that value.</li> </ul>
Don't reroute items already in progress	<p>When this check box is selected, current items already in the workbasket will not be added, and the following error message will appear: "Item is already in process "[ &lt;current process&gt;]" so it is not being re-added."</p>

**9.4.1.2.4 Objects tab**

**Document Parts** and **Resource Items** are objects and are designated as categories from the **Item** tab on the **Edit Definition** window. When selected, these categories activate the **Objects** tab, where you specify the file type, color format, compression, **MIME** type, and other object properties.

This tab is only available for these categories specified on the **Item** tab:

- **Document Part**
- **Resource Item**

**Table 9-8: Objects tab**

Element	Description
<b>If the item being processed already has content then copy that content to this file on the InputAccel Server</b>	Retrieves existing content from the Content Manager system and stores it as a stage file on the Intelligent Capture Server. Select the IA Value from the list box
<b>Add a new object to the item(s) being processed</b>	When this check box is enabled, the system creates a new object based on the item definition. A new object is created if other conditional settings in the <b>Item Definition</b> and <b>Export</b> list box are correct. Selecting this check box makes the <b>Object Source</b> options available, allowing you to specify the Object Source settings.

Element	Description
Object Source	<ul style="list-style-type: none"> <li>• <b>File Value:</b> Select the input or output file you want to export to the Content Manager system from among this list of all file values from all modules included in <i>MDF</i> of this instance.</li> <li>• <b>Copy the file without modification:</b> Select this option to export the specified file without modification, exactly as it is stored in the Intelligent Capture Server. You must select this option if you are exporting non-image files.</li> <li>• <b>Save the file with these settings:</b> Select this option to convert the selected File Value to the format specified by the settings in the following table. This option can only be used for image files. When selected, the following options are available. <ul style="list-style-type: none"> <li>– <b>File Type:</b> Select the file type from those listed. You should select a file type that is compatible with the application that will be used to view the exported images.</li> <li>– <b>Color Format:</b> Select the color format from those listed. The list varies depending on the selected file type. You should select a color format that is compatible with the selected file value and with the application that will be used to view the exported images.</li> <li>– <b>Compression:</b> Select the compression from those listed. The list varies depending on the selected file type and color format. You should select a compression that is compatible with the application that will be used to view the exported images.</li> </ul> </li> <li>• <b>Merge Annotations</b> check box: Annotations can be associated with images by modules acting on them before they reach the Export for IBM CM module. This option is used when exporting to file types that do not support annotation tags (i.e., other than <i>TIFF</i> files). If <b>Merge Annotations</b> is selected those annotations will become part of the bitmap image and cannot be edited. (any file type other than TIFF). If the check box is cleared the annotations are preserved</li> </ul>

Element	Description
	as image tags that are separate objects that can be independently edited.
<b>MIME Type</b>	<p>Select a MIME type that describes the type of viewer that should be used to view the content you are exporting. For example, if you are exporting TIFF images, you can select <b>image/tiff</b>.</p> <p>If using an IA Value that during production will resolve to a MIME type, select the <b>Browse</b> button to display the <b>Choose Value</b> window and select that value.</p> <p>MIME types can be added and managed by using Content Manager system administration client.</p>

#### 9.4.1.2.5 Add tab

The **Add** tab is displayed in the **Edit Definition** window. This tab lets you to associate the items created by this item definition with:

- The **Export List** parent defined in the **Export** tab of the **Export for IBM CM Setup** window.
- Items already stored in the Content Manager system.
- Both the parent and existing content.

In addition, for item, document, and resource item categories, you can specify that the association the module creates to an existing item: a link and/or a reference attribute. Alternatively, you can clear all the check boxes on the **Add** tab so these item definition attributes are not associated with any existing content.

This tab is only available for these categories specified on the **Item** tab:

- **Document**
- **Item**
- **Resource Item**

**Table 9-9: Add tab**

Element	Description
<b>Add this item to its parent in the export list box</b>	Select this if you want to associate the items created by this definition with the parent item specified in the export list hierarchy.

Element	Description
<p><b>Add this item to items found by this query</b></p>	<p>Select this check box to associate this item definition with existing content. Also, you must specify the search arguments in the following fields. You must specify a query to find existing content. Type a query in the field following the check boxes in the format, /itemtype[@attribute_name="value" ]. If the batch you are setting up contains an IA Value that will resolve to a valid portion of a query string during production, then type that IA Value in the search field. Alternatively, you can select the <b>Browse</b> button to display the <b>Choose Value</b> window, then select the appropriate IA Value, or specify non-<i>MDF</i> IA Values</p> <ul style="list-style-type: none"> <li>• <b>If more than one item is found:</b> Specify what to do if more than one existing item is found. <ul style="list-style-type: none"> <li>– <b>Modify all items found:</b> Associate the new item definition data with every item found by your search.</li> <li>– <b>Modify only the first item found:</b> Associate the new item definition data with the first item found by your search.</li> <li>– <b>Report an error:</b> Generate an error to be handled according to the error handling setup specified in the <b>Errors</b> tab.</li> </ul> </li> <li>• <b>If no items found:</b> Specify what to do if no items are found. <ul style="list-style-type: none"> <li>– <b>Don't link:</b> Continue without generating an error; do not create a link.</li> <li>– <b>Report an error:</b> Generate an error to be handled according to the error handling setup specified in the <b>Errors</b>.</li> <li>– <b>Increment version number of the found items that support manual versioning:</b> If your query finds existing items that support manual versioning, you can enable version control by selecting this check box. This will increment the version number of the linked object. Otherwise, clear this check box.</li> </ul> </li> </ul>

Element	Description
Add methods	<p>If you are creating an item, document, or resource item definition, this enables you to specify how to associate the content with existing content.</p> <ul style="list-style-type: none"> <li>• <b>Add as a link of this type:</b> Select this check box if you want to link to the specified items. Then select the link type from the list box. If you are using an IA Value that will resolve to the name of a link type during production, then select the <b>Browse</b> button to display the <b>Choose Value</b> window and select that value. <ul style="list-style-type: none"> <li>– If you select this option, you must specify a link type.</li> <li>– If the existing link types do not meet your needs, then use Content Manager system administration client to define new ones.</li> </ul> </li> <li>• <b>Assign this item to the following reference attribute contained in the item specified earlier:</b> Select this check box to create a reference to the items specified earlier. Then select the reference attribute from the list box. If you are using an IA Value that will resolve to the name of a reference attribute during production, then select the browse button to display the <b>Choose Value</b> window and select that value. <ul style="list-style-type: none"> <li>– If you select this option, then you must specify a reference attribute.</li> <li>– If the existing reference attributes do not meet your needs, then use Content Manager system administration client to define new ones.</li> </ul> </li> </ul>

### 9.4.1.3 Export for IBM CM

The **Export for IBM CM** window is the control center for launching and monitoring export tasks.

**Table 9-10: Export for IBM CM Window**

Element	Description
File menu	The <b>File</b> menu enables you to open and process batches, and open sessions for those batches.

Element	Description
<b>Run menu</b>	The <b>Run</b> menu enables you to run all available batches or a single selected batch.
<b>Help menu</b>	Provides access to the help system where you can find information to guide you while working in the module.
<b>Toolbar</b>	The <b>Export for IBM CM</b> window toolbar provides you with buttons to open sessions, launch, and close export processes.
<b>Task Progress</b>	An expanding bar represents the current task progress.
<b>Processing from batch</b>	The name of the batch that is being processed.
<b>Instance</b>	The name of the step the batch is based on.
<b>Task Node</b>	The current node being processed.
<b>Tasks remaining on server</b>	The number of tasks remaining to be processed.
<b>Error Message pane</b>	<p>The <b>Error Message</b> pane opens in the <b>Export for IBM CM (production)</b> window when an error is encountered during production. This pane gives a short explanation of the error. This error message also displays in the <b>Activity Messages</b> pane, where more information about the error is given.</p> <p>When you click the reported error in the <b>Error Message</b> pane, the error is highlighted in the <b>Activity Messages</b> pane where you can obtain information about the error message including the error code, and information about the batch, instance, and task in which the error occurred.</p> <p>If you double-click the reported error, it is removed from the <b>Error Message</b> pane, and a black circle with an X appear at the location of the error in the <b>Activity Messages</b> pane, indicating that you have reviewed the error.</p>
<b>Activity Messages pane</b>	Reports all user and production activity.

### 9.4.1.3.1 File Menu

The **Export for IBM CM** window, **File** menu provides you with commands to open sessions, run open batches, and export batches.

**Table 9-11: File Menu**

Element	Description
Sessions	Opens the <b>Content Manager - Connect</b> window so you can open server sessions for batch processing of tasks without embedded session logon information.
Open Batch	Opens a batch for processing in Open Batch mode.
Close Batch	Closes an open batch.
Set Up Instance	Displays the <b>Export for IBM CM Setup</b> window, allowing you to specify custom settings for the Open Batch.
Export	Processes the open batch.
Exit	Exits the Export for IBM CM module.

### 9.4.1.3.2 Run Menu

The **Export for IBM CM** window, **Run** menu provides you with commands to control all batches or a single batch.









**Table 9-12: Run Menu**

Element	Description
All Batches	Run All Batches mode is a Wait for Task mode (a mode in which you can only process batches that are queued on the Intelligent Capture Server for the module). In Run All Batches mode, the module receives any queued tasks from any open batch as the tasks become available from the Intelligent Capture Server.
Single Batch	Run Single Batch mode is a Wait for Task mode. In Run Single Batch mode, you choose a single queued batch to process.
Stop	Cancel processing of the current task and stop accepting tasks from the Intelligent Capture Server.

**9.4.1.3.3 Toolbar**

The Export for IBM CM toolbar provides you with buttons to launch or close export processes.

**Table 9-13: Export for IBM CM Toolbar**

Button	Button Name	Function
	Sessions	Opens the <b>Content Manager - Connect</b> window so you can open server sessions for batch processing of tasks without embedded session logon information.
	Open Batch	Opens a batch for processing in Open Batch mode.
	Close Batch	Closes an open batch.
	Set Up Instance	Displays the <b>Export for IBM CM Setup</b> window, allowing you to specify custom settings for the Open Batch.
	Export	Processes the open batch.
	Run All Batches	Run All Batches mode is a Wait for Task mode (a mode in which you can only process batches that are queued on the Intelligent Capture Server for the module). In Run All Batches mode, the module receives any queued tasks from any open batch as the tasks become available from the Intelligent Capture Server.
	Run Single Batch	Run Single Batch mode is a Wait for Task mode. In Run Single Batch mode, you choose a single queued batch to process.
	Stop	Cancel processing of the current task and stop accepting tasks from the Intelligent CaptureServer.

### 9.4.1.4 Export for IBM CM Setup

The **Export for IBM CM Setup** window displays the following options:

**Table 9-14: Export for IBM CM Setup Window**

Element	Description
Logon tab	Use the <b>Logon tab</b> to specify user credentials for the Content Manager server.
Export tab	Use the <b>Export tab</b> to specify how the Export for IBM CM module processes tasks and what the module should export.
Errors tab	Use the <b>Errors tab</b> to specify how the module should handle errors during production.
Logging tab	Use the <b>Logging tab</b> to specify whether the module logs both errors and informational messages or just errors. Also use this tab to specify where the module should save error and informational messages.
Info tab	Use the <b>Info tab</b> to view information about the module step.
OK	Click to save your settings and close the <b>Export for IBM CM Setup</b> window.
Cancel	Click to close the <b>Export for IBM CM Setup</b> window without saving any settings.

#### 9.4.1.4.1 Logon tab

The **Logon tab** of the **Export for IBM CM Setup** window connects you to the Content Manager server.

There are two parts to configuring repository sessions:

- Logging in for setup purposes.
- Specifying how you want the module to connect and disconnect from the repository system during production.

**Table 9-15: Logon tab**

Element	Description
Server	Name of the server.
User	Your user name for the specified server.
Password	The password for the specified user and server.

Element	Description
<p><b>Automatic Logon</b></p>	<p>Use the above user and password for tasks sent to this instance check box uses the <b>Server</b>, <b>User</b>, and <b>Password</b> elements of the <b>Logon</b> tab.</p> <p><b>Disconnect when</b> list box, choose the disconnect event for task-based connections:</p> <ul style="list-style-type: none"> <li>• <b>The task is finished:</b> The module closes the specified session when the task finishes. You might choose this option to help manage a limited number of Content Manager licenses among multiple clients.</li> <li>• <b>A task with different login information is received:</b> The module maintains the session with the specified Content Manager server until it receives a task that specifies a different session. It then disconnects from any other task-based sessions before connecting using the new task's session information. You might choose this option when most tasks will be exported to a single Content Manager session, as fewer logout/login cycles will improve performance.</li> <li>• <b>The module exits:</b> Once connected, the module maintains the specified session(s) until the module exits, even if tasks from other instances cause the module to connect to other sessions. You might choose this option when you have sufficient Content Manager licenses for all clients that will be simultaneously accessing the server, as no logout and fewer login cycles will improve performance and module throughput.</li> </ul>
<p><b>Connection Status</b></p>	<ul style="list-style-type: none"> <li>• If it shows <b>Connected to server_name as user_ID</b>, then the module is already logged in with the credentials indicated. If this connection is valid for setting up the current module instance, perform other setup tasks then Click <b>OK</b> to save your settings and exit setup mode.</li> <li>• If it shows <b>Not connected</b>, then the module is not logged in.</li> </ul>

### 9.4.1.4.2 Export tab

The **Export** tab of the **Export for IBM CM Setup** window lets you specify how the Export for IBM CM module processes tasks and what the module exports.

 **Note:** Export for IBM CM fully supports the IBM Content Manager data model, which enables storing of content in ways that can make it inaccessible to some applications (such as the IBM Content Manager Client). As you plan how to export your data, use storage that is compatible with the applications that retrieve the data.

**Table 9-16: Export tab**

Element	Description
<b>Definition Set</b>	<p>A definition contains the settings needed to manipulate an item or entities related to an item (parts, child components, etc.). The <b>Definition Set</b> contains all of the definitions that might be used by this instance.</p> <ul style="list-style-type: none"> <li>• <b>Create:</b> Displays the <b>Edit Definition</b> window so you can create a definition.</li> <li>• <b>Edit:</b> Displays the <b>Edit definition</b> so you can edit the selected definition.</li> <li>• <b>Delete:</b> Removes the selected definition from the list box.</li> </ul>
<b>Export list box</b>	<p>The <b>Export</b> list box selects the definitions used to process groups of pages. The name and parent-child relationship between rows determine the start and end of each group. The relationships may also be used by the Definitions to create links or references.</p> <ul style="list-style-type: none"> <li>• <b>Insert:</b> Inserts a new row in the export list box. This is how you set up parent-child relationships between the definitions.</li> <li>• <b>Edit:</b> Edits the properties for the selected definition.</li> <li>• <b>Delete:</b> Removes the selected item from the <b>Export</b> list box.</li> </ul>

#### 9.4.1.4.3 Errors tab

The **Errors** tab of the **Export for IBM CM Setup** window lets you specify how Export for IBM CM responds when an error occurs during processing. The options you select depends primarily on whether you are planning to use the module in an attended or unattended mode during production.



**Note:** Error handling options also determine what happens when the module receives a task that specifies a server for which it does not have credentials.

Table 9-17: Errors tab

Element	Description
When an Error Occurs	<p>Select the <b>Prompt for an action</b> or <b>Automatically respond with the following actions</b> depending on whether production will occur on an attended or unattended workstation.</p> <p><b>Prompt for an action:</b> This option is for attended workstations only. Selecting this option suspends processing until the operator responds to the <b>Production Error</b> window.</p> <p><b>Automatically respond with the following actions:</b> This option is for unattended workstations or when operator intervention is not necessary. You can specify the following settings when this option is selected.</p> <ul style="list-style-type: none"> <li>• <b>Abort entire task:</b> Aborts the current task and returns an appropriate <i>&lt;ExportResult&gt;</i> IA Value, which is evaluated by instructions in the <b>IPP Finish</b> event handler. The module may or may not continue processing other tasks depending on how you set the remaining options in this section. If you do not plan to provide error handling in your IPP, you should select the default settings of <b>Abort entire task</b> and <b>Set the batch priority to 0</b> when automatically responding to errors to avoid an ongoing, error retry situation.</li> <li>• <b>Skip node that produced the error and continue with remaining nodes:</b> Skips the node where error occurred and attempts to continue with the remaining nodes in the task, if any. The module returns an appropriate <i>&lt;ExportResult&gt;</i> IA Value for the node that produced the error occurred, which is evaluated by instructions in the <b>Finish</b> event handler of the IPP.</li> <li>• <b>Stop receiving tasks after current task:</b> Stops receiving tasks from the Intelligent Capture Server when an error occurs in the current task. This is equivalent to the operator choosing the <b>Stop</b> command.</li> <li>• <b>Set the batch priority to 0:</b> Sets the batch priority of the current task to 0 when an error occurs. This takes the batch off line,</li> </ul>

Element	Description
	preventing further processing by any module until the administrator resets the batch priority. When this check box is cleared, the batch priority is not changed and batch processing continues as before the error occurred, except as specified in the <b>IPP Error</b> event handler (when you select <b>Abort entire task</b> ) or in the <b>Finish</b> event handler (when you select <b>Skip node</b> that produced the error and continue with remaining nodes) in response to the <i>&lt;ExportResult&gt; IA Value</i> .
<b>Recovery Options</b>	<ul style="list-style-type: none"> <li>• <b>Automatically retry n times before reporting error:</b> Select the check box if you want the module to automatically retry processing the task that caused an error. Specify the number of times it should retry in the field to the right. Some error conditions can cease to exist upon subsequent attempts at processing a task. For example, a temporary file or record lock in the repository server might cause an error, but might be resolved by the time the module attempts to process the task again. Clear the check box if you do not want the module to retry tasks that produce errors.</li> <li>• <b>Skip nodes that have already been successfully processed by this instance:</b> Prevents the module from reprocessing nodes that have already been successfully processed. When this field is cleared, the module will reprocess all nodes in the task, even those that have already been successfully processed.</li> </ul>

#### 9.4.1.4.4 Logging tab

The **Logging** tab of the **Export for IBM CM Setup** window allows you to specify how the module records error messages and informational messages as it processes tasks in production mode. The options you select depend primarily on whether you want to have a log of error messages, informational messages, or both, and where you want to save the logs.

**Table 9-18: Logging tab**

Element	Description
Log messages to a file	<p>Log messages to a specified file. When selected activates <b>Severity to log</b> and <b>File name</b>.</p> <ul style="list-style-type: none"> <li>• <b>Severity to log:</b> From the list box, select: <ul style="list-style-type: none"> <li>– <b>Errors Only</b></li> <li>– <b>Errors and Information</b></li> </ul> </li> <li>• <b>File name:</b> Contains the name and location of the log file name. You can use the <b>Browse</b> button to point to the file location from the <b>Select</b> window. When you log messages to a shared location and are running multiple copies of the module, you must specify a unique log file name for each module step by specifying the appropriate IA Values in the file name.</li> </ul>
Send error messages to the InputAccel Server's Event Log	Logs error messages to the Intelligent Capture Server.

**9.4.1.4.5 Info tab**

The **Info** tab of the **Export for IBM CM Setup** displays module and server information. This information cannot be edited. Modification of any of these properties must be completed during module setup.

**Table 9-19: Info tab**

Element	Description
Instance Properties	<ul style="list-style-type: none"> <li>• <b>Name:</b> The name of the module step as declared in the <i>IPP</i>.</li> <li>• <b>Departments:</b> The names of departments defined in the batch or process.</li> <li>• <b>Process/Batch name:</b> The name of the batch or process that contains the module instance.</li> <li>• <b>Process/Batch ID:</b> The unique ID number of the batch or process that contains the module instance.</li> </ul>

Element	Description
InputAccel Server Connection	<ul style="list-style-type: none"> <li>• <b>Server name:</b> The Intelligent Capture Server name that is connected to the client workstation. This is the server that owns the batch or process you are setting up.</li> <li>• <b>Username:</b> The domain and user ID specified when the connection to the Intelligent Capture Server was established in setup mode.</li> </ul>

#### 9.4.1.5 Open Batch

The **Open Batch** window enables you to select a batch to run when you are in Open Batch mode. This window can show all available batches, or you can select **Show only Batches with Tasks** and click the **Refresh** button to limit the list of batches.

#### 9.4.1.6 Production Error

On attended workstations, you can prompt for operator response when you encounter errors during production. This functionality is enabled if you select the **Prompt for an action** check box from the **Errors** tab on the **Export for IBM CM Setup** window. When an error occurs under this situation, the **Production Error** window is displayed stating the error message and error code. You are presented with the following options:

**Table 9-20: Production Error Window**

Setting	Description
How do you want to handle this error	<ul style="list-style-type: none"> <li>• <b>Retry the current node:</b> Select this option when you can correct the error and, upon retry, the task is successfully completed.</li> <li>• <b>Stop all processing on this task:</b> Select this option when the task is causing the error. You stop task processing until the error is corrected.</li> <li>• <b>Continue with other nodes in this task:</b> Select this option when the node is causing the error. The node with an error is skipped as task processing continues with the other nodes.</li> </ul>
and set the batch's priority to 0	Select this check box to stop all batch processing. Unprocessed tasks that remain in the batch are stored on the Intelligent Capture Server until an administrator resets the batch priority to non-zero. Clear this check box if you want to keep processing the remaining tasks in the batch.


Setting	Description
then stop waiting for tasks	Select this check box if you want to stop waiting for tasks. Until you select a processing mode, task processing stops at the client workstation. Clear this check box when you want to continue processing tasks in the current processing mode.

## 9.4.2 IA Values

The topics in this section describe IA values that can be used with this application.

### 9.4.2.1 Input IA Values

Input IA Values include input file variables, such as `<Level0_InputFile1>`, which serve as pointers to stage files, and input processing variables, which store setup data that a module uses to process tasks, including default and user-defined module settings.

 **Note:** The Export for IBM Content Manager module does not have any file IA Value names stored internally. Instead the names of all file values are selected through setup mode. For that reason you can rename, add, or remove any of the file values as appropriate. You select from the available values during setup. The following file values are included as examples of recommended naming conventions.

The following table describes input files.

**Table 9-21: Input IA Values**

IA Value	Description
<code>&lt;InputImage&gt;</code>	<p>The task input image on the Intelligent Capture Server. <code>InputImage</code> can be any type of image file processed by upstream modules. Use of an <code>&lt;InputImage&gt;</code> is optional; the module can export file values from other modules in the process.</p> <p><code>&lt;InputImage&gt;</code> can also be an image item that was retrieved from the Content Manager system and assigned to this file IA Value. This assignment is made during module step setup by using the <b>Objects</b> tab of the <b>Edit Definition</b> window.</p> <p>If this value is used in the <i>IPP</i>, it is a trigger. When all trigger values are non-zero, the module will process the current task.</p> <ul style="list-style-type: none"> <li>• <b>Attributes:</b> File, Input, Trigger</li> <li>• <b>Level:</b> 0</li> </ul>

IA Value	Description
<Level<n>_InputFile1>	<p>The first of as many as two input files from the task. The file that corresponds with &lt;Level&lt;n&gt;_InputFile1&gt; can be a file of any type whose data you may want to export. The module will not modify this file in any way.</p> <p>&lt;Level&lt;n&gt;_InputFile1&gt; can also be any item that was retrieved from the IBM Content Manager system and assigned to this file IA Value. This assignment is made during module step setup by using the <b>Objects</b> tab of the module's <b>Edit Definition</b> window.</p> <p>If this value is used in the IPP, it is a trigger. When all trigger values are non-zero, the module will process the current task.</p> <ul style="list-style-type: none"> <li>• <b>Attributes:</b> File, Input, Trigger</li> <li>• <b>Level:</b> &lt;n&gt; where n = 0 - 7</li> </ul>
<Level<n>_InputFile2>	<p>The second of as many as two input files from the task. The file that corresponds with &lt;Level&lt;n&gt;_InputFile2&gt; can be a file of any type whose data you may want to export. The module will not modify this file in any way.</p> <p>&lt;Level&lt;n&gt;_InputFile2&gt; can also be any item that was retrieved from the IBM Content Manager system and assigned to this file IA Value. This assignment is made during module step setup by using the <b>Objects</b> tab of the module <b>Edit Definition</b> window.</p> <p>If this value is used in the IPP, it is a trigger. When all trigger values are non-zero, the module will process the current task.</p> <ul style="list-style-type: none"> <li>• <b>Attributes:</b> File, Input, Trigger</li> <li>• <b>Level:</b> &lt;n&gt; where n = 0 - 7</li> </ul>
<i>Input values</i>	
<Ready>	<p>The primary trigger value for the module, this value should always be used regardless of whether an &lt;InputImage&gt; or &lt;InputFile&gt; is available for use as a trigger. When all trigger values including &lt;Ready&gt; are non-zero, the module will process the current task.</p> <ul style="list-style-type: none"> <li>• <b>Attributes:</b> File, Input, Trigger</li> <li>• <b>Level:</b> T</li> </ul>

IA Value	Description
<Level0_Processed>	<p>Setting this value to 1 indicates that all the level 0 nodes of the task have been processed.</p> <ul style="list-style-type: none"> <li>• <b>Attributes:</b> Long, Input, NoTrigger</li> <li>• <b>Level:</b> 0</li> </ul>

### 9.4.2.2 Output IA Values


Output IA Values include the output file variables <Level0\_OutputFile1> and <OutputFile2>, which serve as pointers to stage files, dynamic output variables, which store data generated by the module during processing, and status, error, and statistical variables, which enable administrators to gather statistical information on module and operator performance.

The following table describes output files.

**Table 9-22: Output IA Values**

IA Value	Description
<Level0_OutputFile1>	<p>The first of as many as two output files from the task. The file that corresponds with &lt;Level0_OutputFile1&gt; can be a file of any type that was retrieved from the Content Manager system and assigned to this file during module step setup in the <b>Objects</b> tab of the module <b>Edit Definition</b> window. The module does not modify this file in any way; however, it enables other modules to retrieve the file from the Intelligent Capture server and process.</p> <ul style="list-style-type: none"> <li>• <b>Attributes:</b> File, Output</li> <li>• <b>Level:</b> 0</li> </ul>
<Level0_OutputFile2>	<p>The second of as many as two output files from the task. The file that corresponds with &lt;Level0_OutputFile2&gt; can be a file of any type that was retrieved from the Content Manager system and assigned to this file in the <b>Objects</b> tab of the module <b>Item Definition</b> window. The module does not modify this file in any way; however, it enables other modules to retrieve the file from the Intelligent Capture Server and process.</p> <ul style="list-style-type: none"> <li>• <b>Attributes:</b> File, Output</li> <li>• <b>Level:</b> 0</li> </ul>

The Export for IBM CM module creates the following dynamic values as necessary as the module processes tasks.

 **Note:** The following dynamic values are generated as needed while the module is running in production mode. They are not declared in the *MDF*.

The following table describes dynamic output variables.

**Table 9-23: Dynamic Output Variables**

IA Value	Description
<ItemPid[1-m]_[1-n]>	<p>When a task is processed and modifies an item in the Content Manager system, this value contains the <i>PID</i>, which contains an item ID and version number generated by Content Manager that is written back to the IA server. This value references the &lt;n&gt;th item that was modified for the &lt;m&gt;th entry in the Export for IBM CM module <b>Export</b> list box.</p> <ul style="list-style-type: none"> <li>• <b>Attributes:</b> Output</li> <li>• <b>Level:</b> 0</li> </ul>
<AddedToPid[1-m]_[1-n]>	<p>When processing a task modifies an item in the Content Manager system that was referenced in the Export for IBM CM module <b>Export</b> list box, this value contains the PID that represents parent of the &lt;n&gt;th item that was modified in the &lt;m&gt;th entry in the Export List.</p> <ul style="list-style-type: none"> <li>• <b>Attributes:</b> Output</li> <li>• <b>Level:</b> 0</li> </ul>
<WorkpackagePid[1-m]_[1-n]>	<p>When processing a task modifies an item in the Content Manager system that was referenced in the Export for IBM CM module Export List, this value contains the PID of the work package that contains the &lt;n&gt;th item that was modified in the &lt;m&gt;th entry in the <b>Export</b> list box when document routing has been enabled. (A work package contains one or more workbaskets.)</p> <ul style="list-style-type: none"> <li>• <b>Attributes:</b> Output</li> <li>• <b>Level:</b> 0</li> </ul>
<Status[1-m]>	<p>The status of the &lt;m&gt;th item in the <b>Export</b> list box, which can be either of these values:</p> <p>0: Modified existing item.</p> <p>1: Created new item.</p> <ul style="list-style-type: none"> <li>• <b>Attributes:</b> Output</li> <li>• <b>Level:</b> 0</li> </ul>

The following table describes status and error variables.

**Table 9-24: Status and Error Variables**

IA Value	Description
<ErrorNumber>	<p>The error number of the error, if any, that occurred while processing this task.</p> <ul style="list-style-type: none"> <li>• <b>Attributes:</b> Long, Output</li> <li>• <b>Level:</b> T</li> </ul>
<ErrorText>	<p>The text string of the error, if any, that occurred while processing this task.</p> <ul style="list-style-type: none"> <li>• <b>Attributes:</b> String, Output</li> <li>• <b>Level:</b> T</li> </ul>
<ExportResult>	<p>If all documents contained by the task were exported successfully, this variable is set to zero. Otherwise, this variable contains a negative number indicating the error.</p> <p>You can check this variable in a &lt;Finish&gt; event handler after export to determine whether any documents need to be re-exported again. To determine which documents need to be re-exported, check the &lt;Level0_ErrorNumber&gt; and &lt;Level0_ErrorText&gt; IA Values for the Node where the error occurred.</p> <ul style="list-style-type: none"> <li>• <b>Attributes:</b> Long, Output</li> <li>• <b>Level:</b> T</li> </ul>
<Level0_ErrorNumber>	<p>The error number of the last error that occurred.</p> <ul style="list-style-type: none"> <li>• <b>Attributes:</b> Long, Output</li> <li>• <b>Level:</b> 0</li> </ul>
<Level0_ErrorText>	<p>The text of the last error that occurred.</p> <ul style="list-style-type: none"> <li>• <b>Attributes:</b> String, Output</li> <li>• <b>Level:</b> 0</li> </ul>
<Level0_Processed>	<p>A value that is set to 1 when the level 0 nodes of the task have all been processed.</p> <ul style="list-style-type: none"> <li>• <b>Attributes:</b> Long, Output</li> <li>• <b>Level:</b> 0</li> </ul>

The following table describes statistical variables.

**Table 9-25: Statistical Variables**

IA Value	Description
<StartTime>	The time at which processing on the task commenced. <ul style="list-style-type: none"> <li>• <b>Attributes:</b> String, Output</li> <li>• <b>Level:</b> T</li> </ul>
<StartDate>	The date on which processing on the task commenced. <ul style="list-style-type: none"> <li>• <b>Attributes:</b> String, Output</li> <li>• <b>Level:</b> T</li> </ul>
<EndTime>	The time at which processing on the task completed. <ul style="list-style-type: none"> <li>• <b>Attributes:</b> String, Output</li> <li>• <b>Level:</b> T</li> </ul>
<EndDate>	The date on which processing on the task completed. <ul style="list-style-type: none"> <li>• <b>Attributes:</b> String, Output</li> <li>• <b>Level:</b> T</li> </ul>
<TotalTime>	The task processing time in milliseconds. <ul style="list-style-type: none"> <li>• <b>Attributes:</b> Long, Output</li> <li>• <b>Level:</b> T</li> </ul>
<Operator>	The user name of the operator who is logged into the module. <ul style="list-style-type: none"> <li>• <b>Attributes:</b> String, Output</li> <li>• <b>Level:</b> T</li> </ul>
<Level0_StartTime>	The time at which processing on the node commenced. <ul style="list-style-type: none"> <li>• <b>Attributes:</b> String, Output</li> <li>• <b>Level:</b> 0</li> </ul>
<Level0_StartDate>	The date on which processing on the node commenced. <ul style="list-style-type: none"> <li>• <b>Attributes:</b> String, Output</li> <li>• <b>Level:</b> 0</li> </ul>
<Level0_EndTime>	The time at which processing on the node completed. <ul style="list-style-type: none"> <li>• <b>Attributes:</b> String, Output</li> <li>• <b>Level:</b> 0</li> </ul>

IA Value	Description
<Level0_EndDate>	The date on which processing on the node completed. <ul style="list-style-type: none"> <li>• <b>Attributes:</b> String, Output</li> <li>• <b>Level:</b> 0</li> </ul>
<Level0_TotalTime>	The total task processing time in milliseconds. <ul style="list-style-type: none"> <li>• <b>Attributes:</b> Long, Output</li> <li>• <b>Level:</b> 0</li> </ul>

### 9.4.2.3 IA Values in Item Type

The item type can contain an IA Value set through the *IPP*. Set the <\$batch/\$instance/ItemDefinitions<N>\_ItemType\_Type> value where <N> is the number of the definition on which to set the value.

Create two or more item types that are identical except for their names. Include ScanPlus and Export for IBM CM in your process.



#### Notes

- Name the Export for IBM CM step ExICM if you plan to use the following code.

If you insert the following code into the ScanPlus Finish function of your process, then the export module uses the item type that you specified in the ScanPlus **Index** field.

```
Private Sub Scan_Finish(ByVal p As IASLib.IAS_RECORD_0)
On Error GoTo filefailure
'If you are using a version of the server that supports the Batch_Create event, it
would be better to do this there because it only needs to happen once per batch.
Dim lDefs As Long
Dim i As Long
lDefs = IValueGetLong("$batch=" & p.Tree.BatchID & "/$instance=ExICM/
NumItemDefinitions", 0)
For i = 1 To lDefs
If IValueGetAscii("$batch=" & p.Tree.BatchID & "/$instance=ExICM/ItemDefinitions"
& i & "_ItemType_Name", "-notfound-") = "Document" Then
Call IValueSetAscii("$batch=" & p.Tree.BatchID & "/$instance=ExICM/
ItemDefinitions" & i & "_ItemType_Type", "@(Scan.Level_1_KeyEntry_0)")
End If
Exit For
Next i
p.ExICM.InputImage = p.Scan.OutputImage
ExitFinish:
Exit Sub
filefailure:
'TODO: fill in code to handle file failure here
End Sub
Resume ExitFinish
```

Finish the code for the rest of the process instances. Compile and install the process. Set up the Scan module so that there is one level 1 index field, and set up ExICM so that it exports a document in *TIFF* format using either of the duplicated but differently named item types.

- To achieve the similar result in an XPP generated process, modify the corresponding process step value in Intelligent Capture Administrator. See *Administration Guide > Using Intelligent Capture Administrator > Managing Intelligent Capture using the Intelligent Capture Administrator > Managing Processes and Batches > Managing Processes > Viewing or Modifying IA Values of a Process* for the steps to modify a process step IA Value.

## Chapter 10

# Microsoft SharePoint Export

This section includes the Intelligent Capture specialized enterprise export module: **ecpcore-cxh**.

For information about common features and functionalities in the Intelligent Capture client modules, see *OpenText Intelligent Capture - Module Reference (ECPCORE-CMD)*.

The Microsoft SharePoint Export module (Microsoft SharePoint Export) exports documents, images, and index data from an Intelligent Capture system directly into the SharePoint Portal Server repository system. See the *Intelligent Capture Release Notes* (available in My Support (<https://support.opentext.com/>)) for the list of supported SharePoint Portal Server repository systems.

Microsoft SharePoint Export directly implements and supports the SharePoint object model, and has the ability to connect to and export documents directly into the SharePoint Portal Server. In addition to direct *TCP/IP* network connections, Microsoft SharePoint Export supports connection over secure *HTTP* protocol (*HTTPS*).

Microsoft SharePoint Export can be used at any trigger level from 0–7, which means that it can process pages individually, any intermediate group of pages and documents, or entire batches in one operation. By processing at levels higher than 0 (page level), the module can export metadata (index values) that apply to groups of pages that have been exported in a hierarchy of, for example, cabinets, drawers, folders, documents, and pages.

To define how the module works, an administrator runs the module in setup mode and defines the necessary information before configuring the module to run in production mode. Key information that is configured in setup mode includes:

- Specifying session credentials for the repository connection
- Creating Definitions and Definitions Sets that define the mapping between *IA* Values and the SharePoint object model
- Specifying Definition properties
- Specifying the export file and the destination file
- Adding listings to files that have already been exported
- Selecting the Definition to export
- Defining when the module creates a new document

After setting up Microsoft SharePoint Export steps in your processes and batches, run the module in production mode. In most cases, Microsoft SharePoint Export will

run unattended, processing all tasks from all batches as the tasks become available from the Intelligent Capture Servers to which the module is connected.



**Note:** If customers create batches in one version of SharePoint, and then attempt to export to a different version of SharePoint, the export fails. If you create batches using SharePoint 2007, then exporting to SharePoint 2010 fails.

## 10.1 Setting Up Microsoft SharePoint Export

Most configuration information for Intelligent Capture client modules is defined during *module setup*. You can run a module in setup mode from Intelligent Capture Designer, from Intelligent Capture Administrator, or from a command prompt with appropriate arguments. For more information, see *OpenText Intelligent Capture - Module Reference (ECPCORE-CMD)*.

When launched in setup mode, a client module displays the **Setup** window in which you can specify the module's configuration settings.

### 10.1.1 Setting Up Repository Sessions

To set up the custom export module, you must connect to a Microsoft SharePoint Server repository and log in using an established session account. The connection you make must be the one you want this step of the export module to use. There are two tasks to complete when configuring repository sessions:

- Running the module for setup and establishing a connection with one or more repository servers.
- Specifying how the module will connect and disconnect from the repository system during production processing.

#### To set up a connection to the repository server:

1. Run the Microsoft SharePoint Export module for setup.
2. Select the **Logon tab** on the **Microsoft SharePoint Export Setup window**. Note the information in the **Connection Status** field at the bottom of the tab. It will show one of the following:
  - When **Connected to server\_name as user\_ID** displays, the module is already logged in with the credentials indicated. If this connection is valid for setting up the current Microsoft SharePoint Export step, perform other setup tasks described in this section, and then click **OK** to save your settings and exit setup mode.
  - When **Connected to server\_name as user\_ID** displays but the connection is not valid for setting up the current Microsoft SharePoint Export step, select **Disconnect** and proceed to step 3 in this procedure.
  - When **Not connected** displays, you are not logged on to the Microsoft SharePoint Export module. Proceed to step 3 in this procedure.

3. In the **Server** field select the repository server to which you want to connect. The list of servers available to the module is configured during installation of the repository client software.
4. In the **User name** field, type a valid user ID for the selected repository server.
5. In the **Password** field, type a valid password.
6. In the **Domain** field, type a valid domain.
7. Select **Connect**. If the module is able to connect to the repository server, the **Connection Status** field shows the connection information. If the module is not able to connect, repeat the preceding steps by selecting a different server or supplying different connection credentials.
8. Select the **Automatic Logon** checkbox if you want to use the information supplied in the **Server**, **User Name**, **Password** and **Domain** fields to automatically log in when tasks are sent to this step.
9. Perform other setup tasks, then click **OK** to save your settings and exit setup.

## 10.1.2 Setting Up Exporting

Use the **Export** tab in the **Microsoft SharePoint Export Setup** window to specify how the module should process tasks, and what information the module should export to the repository system. To properly configure this module you must first:

- Create at minimum of one definition.
- Specify which definition to use when exporting.
- Specify when a new document should be created.

### 10.1.2.1 Creating, Editing, or Deleting Definitions

Before you can export content to the repository system, you must create at least one definition. The definitions provide the exporter with specific information about how files are exported, where they are exported, what naming conventions are used, and other critical information. All existing definitions are listed in the **Definition Set** field of the **Export** tab.

#### To create, edit, or delete a document definition:

1. Run Microsoft SharePoint Export for setup. The **Microsoft SharePoint Export Setup** window displays.
2. Select the **Export** tab.
3. In the **Definition Set** area:
  - To create a definition, click the **New** button. The **Definition Properties** window displays.
  - Select an existing definition and click the **Edit** button to edit the selected definition. The **Definition Properties** window displays.

- Select an existing definition and click the **Delete** button to remove the selected definition from the list. A confirmation prompt displays before the set is deleted.
4. Configure each of the tabs in the **Definition Properties** window as explained in the following topics.
    - “General tab” on page 281
    - “Export File tab” on page 282
    - “Destination File tab” on page 283
    - “Document Settings tab” on page 285
    - “Listing tab” on page 286
  5. Click **OK** to close the **Definition Properties** window and proceed with other setup tasks.



**Note:** To set up the exporter, you must be **logged into a repository server** and provide the required information on each of the setup tabs. Remember that some settings can effect other available settings. For example, the Document Library defined on the **General** tab determines the properties available on the **Document Settings** tab.

### 10.1.2.2 Specifying Definition Properties

The information you provide on the **General** tab of the **Definition Properties** window specifies the **Definition Name**, the **Document Library** to be used, and how the document should be added to the repository server.

#### To specify definition properties:

1. From the **Microsoft SharePoint Export Setup** window, select the **Export** tab.
2. Select the definition to which properties should be assigned and click the **Edit** button to display the **Definition Properties** window. The *Creating, editing or deleting definitions* sections contains instructions for creating a definition.
3. On the **General** tab, type in a unique name for the new definition in the **Definition Name** field.
4. In the **Sub-Site** field, specify an export location on the Microsoft SharePoint Server. Specify the location in the following format: in the format `/sites/SiteName`. If this field is left blank, your documents will be exported to the default directory on the server.
  - IA Values may be used in place of a sub-site. Click **Browse** to open the **Choose Value** window, then select the *IA Value* you want to specify for the sub-site.
5. In the **Document Library** field, select or type a document library to receive the exported document. Document libraries listed are specific to the repository

server to which you are connected and represent specific areas on the repository server where folders and files reside. Because you have logged onto the Microsoft SharePoint Server, the list will be populated with the names of the document libraries that exist on the master site for the server. Only the document libraries on the master site are accessible for export.

- IA Values can be used in place of specifying a document library. Click **Browse** to open the **Choose Value** window, then select the *IA* Value you want use to specify the document library.
6. Click **OK** to close the **Definition Properties** window and return to the **Microsoft SharePoint Export Setup** window.

## Related Topics

[“Setting Up Repository Sessions” on page 270](#)

### 10.1.2.3 Specifying the Export File

The **Export File** tab of the **Definition Properties** window specifies the source file to be exported and tells the exporter how to process the source file before exporting it.

#### To specify the export file:

1. From the **Microsoft SharePoint Export Setup** window, select the **Export** tab.
2. Select the definition to which properties should be assigned and click the **Edit** button to display the **Definition Properties** window. The *Creating, editing or deleting definitions* sections contains instructions for creating a definition.
3. Select the **Export File** tab.
4. Select a value from the **File Value** list. The values in this list come directly from values in the process containing the step(s) of Microsoft SharePoint Export module and represent the source file to be exported.
5. Select the **Copy the file without modification** option to prevent changes to the file during export. The source file can be of any type (document, image, or other binary file).
6. Select the **Save the file with these settings** option to perform a conversion of an image file during export. Select this option if you want to combine single-page image files into a multi-page file. When selecting this option, you must specify the following required parameters using the associated lists:
  - **File Type:** Select the image file type to export.
  - **Color Format:** Select the color format (binary, gray scale, 8-bit color, 24-bit color) to export. Only single-page, Intelligent Capture-compatible image files support this export mode. Using this option on non-image-only files may result in an error or an unreadable file. If the export module's input file is not image-only, you must use the **Copy The File Without Modification** option to export the file.

- **Compression:** Select the compression format (None, Group 4, packbits, etc.)
7. Select the **Merge Annotations** check box if the image contains annotations that should be merged with the image.
  8. Click **OK** to close the **Definition Properties** window and return to the **Microsoft SharePoint Export Setup** window.

## Related Topics

[“Setting Up Repository Sessions” on page 270](#)

### 10.1.2.4 Specifying the Destination File

The **Destination File** tab of the **Definition Properties** window provides the exporter with the naming schema and file extension to use when exporting documents with this definition.

#### To specify the destination file:

1. From the **Microsoft SharePoint Export Setup** window, select the **Export** tab.
2. Select the definition to be modified and click the **Edit** button to display the **Definition Properties** window. The *Creating, editing or deleting definitions* sections contains instructions for creating a definition.
3. Select the **Destination File** tab.
4. Specify the **Initial Folder** by clicking **Browse** to display the **Choose Value** window. Type a folder name, browse to an existing folder, or choose an IA Value to use to create an initial folder. Perform one of the following tasks to specify an Initial Folder:
  - Click **Select** to display the **Initial Folder** window. The window shows existing folders in the Document Library on the SharePoint Server. Select the folder you want to use as the initial folder, and then click **OK**.
  - Click **IA Values** to display the **Choose Value** window. Select an IA Value that during production will resolve as the Initial Folder.
  - Type a folder name in the **Initial Folder** field. Specify either a static initial folder path name or an IA Value that, during production, resolves to an initial folder path name. The initial folder you specify must exist on the repository server at the time the export occurs; the export module cannot create the initial folder. Either forward or back slash characters can be used when specifying the initial folder path name.
5. Specify a subfolder of the initial folder by typing in a folder name in the **Subfolders** field. If no subfolder of that name exists when the export runs, it will create the folder. If you using an existing subfolder in the repository, double-check that it is typed correctly. If the subfolder name is misspelled, the exporter will create a folder rather than using the existing folder.

- Alternatively, click **Browse** to select an IA Value from the **Choose Value** window, or type an IA Value directly into the **Subfolders** field. The IA Value you specify must resolve to a valid subfolder name at export time.
6. Type a file naming schema in the **File Name** field. The default setting for this required parameter generates file names based on a schema that uses the name of the batch and numbers documents incrementally. Optionally, you can create your own schema, but be aware that the export module will not overwrite files with duplicate names. For example, if you try to name all files “mybatch”, the module will create the first file, but the second and all subsequent files will generate an error. The module handles these errors according to settings defined on the **Errors** tab of the **Microsoft SharePoint Export Setup** window.
    - Alternatively, click **Browse** to select an IA Value from the **Choose Value** window, or type one or more IA Values directly into the **File Name** field. The IA Value you specify must resolve to a valid and unique file name at export time.
  7. Specify the file name extension (without a period) of the files to be exported. In most cases, the file name extension should match the exported file type (as determined when **Specifying the export file**). For example, if you export a *PDF* file, but specify a Microsoft Word file extension (.doc), most workstations will attempt to open the file using Microsoft Word.
    - Alternatively, instead of a specifying an actual file name extension, you can click **Browse** to select an IA Value from the **Choose Value** window, or you can type one or more IA Values in the **Extension** text box. The IA Value you specify must resolve to the file name extension at run time.
  8. Click **OK** to close the **Definition Properties** window and return to the **Microsoft SharePoint Export Setup** window.

## Related Topics

[“Setting Up Repository Sessions” on page 270](#)

### 10.1.2.5 Creating, Editing, or Deleting Document Properties

The **Document Settings** tab of the **Definition Properties** window allows you to create, edit or delete one or more properties set on the exported document. Properties can include Owner, Title, Description, and other properties that are specific to the Document Library selected for the document.

The Microsoft SharePoint Export module supports properties of type Single line text, Multiline text, Choice, Boolean, Currency, Number, Note, and DateTime. The **Properties** area displays property names and values that have been set up for the document.

#### To create a property, edit an existing property, or delete a property:

1. From the **Microsoft SharePoint Export Setup** window, select the **Export** tab.

2. Select the definition to be modified and click the **Edit** button to display the **Definition Properties** window. The *Creating, editing or deleting definitions* sections contains instructions for creating a definition.
3. Select the **Document Settings** tab.
4. To create a property, click **New**. To edit an existing property, select it from the **Properties** list and click **Edit**. The **Edit Property** window displays. In either case, the **New Property** window displays.
  - a. From the **Property Name** list, select a property to associate with your document. Alternatively, you can click **Browse** to select an *IA Value* from the **Choose Value** window. The *IA Value* you select must resolve to a valid property name at export time. The **Property Name** list will be populated only if you have entered a valid Document Library on the **General** tab.
  - b. In the **Property Value** field, assign a value to the selected property. Alternatively, you can click **Browse** to select an *IA Value* from the **Choose Value** window. The *IA Value* you select must resolve to a valid property value at export time. This field may change depending on the type of property selected in the **Property Name** field. If the property selected is of type Boolean or Choice, the **Property Value** field becomes a combo box that contains the valid choices for the setting. If the property selected is of type **Note**, the field expands to allow you to type multiple lines.
  - c. Click **OK** to add the property and close the **New Property** window.
  - d. Repeat these steps to add as many available properties as you require.
5. To delete an existing property, select it from the **Properties** list and click **Delete**.
6. Click **OK** to close the **Definition Properties** window and return to the **Microsoft SharePoint Export Setup** window.

### 10.1.2.6 Adding Listings to Exported Files

The **Listing** tab of the **Definition Properties** window allows you to add listings to the exported files in other Microsoft SharePoint Portal Server area locations.

#### To add a listing to an exported document:

1. From the **Microsoft SharePoint Export Setup** window, select the **Export** tab.
2. Select the definition to be modified and click the **Edit** button to display the **Definition Properties** window. The *Creating, editing or deleting definitions* sections contains instructions for creating a definition.
3. Select the **Listing** tab.
4. Select the **Add Listing** checkbox to add a listing to the document during export.
5. In the **Location** field, specify the Area locations where listings for the exported documents should be added. The Area locations must exist on the Microsoft SharePoint Server and must take the form "location1;location2". Alternatively, click **Browse** and then perform one of the following tasks:

- Click **Select** to display the **Listing Locations** window, displaying Area locations that are valid for the Microsoft SharePoint Server. Select the locations that you want to contain a listing for the document when it is exported. Then click **OK** to close the **Listing Locations** window.
  - Click **IA Values** to select one or more IA Values from the **Choose Value** window. The IA Value you select must resolve to valid listing locations at run time.
6. Specify the title for the listing in the **Title** field. Either type the text or click **IA Values** to select one or more IA Values from the **Choose Value** window. The IA Value you select must resolve to a valid description at run time.
  7. Specify the description for the listing in the **Description** field. Either type the text or click **IA Values** to select one or more IA Values from the **Choose Value** window. The IA Value you select must resolve to a valid description at run time.
  8. Click **OK** to close the **Definition Properties** window and return to the **Microsoft SharePoint Export Setup** window.

## Related Topics

*“Setting Up Repository Sessions” on page 270*

### 10.1.2.7 Selecting a Definition to Export

The settings on the **Export tab** of the **Microsoft SharePoint Export Setup window** determine how documents are exported to the SharePoint Portal Server. These settings include the type of document to be exported, where the document is stored, and what properties the document contains. After creating definitions, select the definition to use when exporting documents for the current step of Microsoft SharePoint Export module.

#### To select a definition to export:

1. From the **Microsoft SharePoint Export Setup** window, select the **Export tab**.
2. Click the arrow in the **Definition to Export** list box to display a list of available definitions. The *Creating, editing or deleting definitions* sections contains instructions for creating a definition.
3. Select the definition to use when exporting with this step of the exporter from the **Definition to Export** list box.
  - Alternatively, type the definition name or click **Browse** to select an IA Value from the **Choose Value** window. The IA Value you select must resolve to a valid definition name at export time.
4. Click **OK** to close the **Microsoft SharePoint Export Setup** window, or click a different tab to continue setting up this step of the module.

## Related Topics

[“Setting Up Repository Sessions” on page 270](#)

### 10.1.2.8 Specifying When to Create a Document

The settings on the **Export** tab of the **Microsoft SharePoint Export Setup** window determine how documents are exported to the SharePoint Portal Server. These settings include the type of document to be exported, where the document is stored, and what properties the document contains. The values you specify also determine the circumstances that the module uses to evaluate each level 0 node and to determine when a new document is created for export.

#### To set conditions for creating a document:

1. From the **Microsoft SharePoint Export Setup** window, select the **Export** tab.
2. In the **Create a new document when this value changes** field, type a value indicating when a page or node should be created as a new document.
  - This field is predefined with the default setting of @17. This value causes the module to export a document and create a document every time the module encounters a new level 1 (document) node.
  - To modify the default setting, type a new value in the field or click **Browse** to select an IA Value from the **Choose Value** window. The IA Value you select must resolve to a valid value that will cause the module to export and create a document.
3. Click **OK** to close the **Microsoft SharePoint Export Setup** window, or click a different tab to continue setting up this step of the module.

## Related Topics

[“Setting Up Repository Sessions” on page 270](#)

## 10.2 Running Microsoft SharePoint Export in Production

After the module has been set up, tested, and placed in a production environment, operators and administrators will run the module in production.

For information related to common production tasks for unattended modules, see *Running a Module for Production* in the *OpenText Intelligent Capture - Module Reference (ECPCORE-CMD)* guide.



**Note:** The *Running Modules in Production Mode* section contains production topics that are common to many unattended modules and may not apply to this module.

## 10.2.1 Selecting a Repository Connection

Establish repository connections from the **SharePoint Server Logon** window. If a connection already exists, processing can proceed without additional connections.

### To select an existing repository connection for processing:

1. Run the Microsoft SharePoint Export module. The **SharePoint Server Portal Server Compatible Export Logon** window displays. The server name, user name, password and domain of the current connection are listed in the designated fields.
2. Click **OK** to accept the current connection. The production window of the module displays.
3. Process tasks.

## 10.2.2 Connecting to Repository Sessions

Repository connections are established from the **SharePoint Server Logon** window.

### To connect to one or more repository sessions:

1. Run the Microsoft SharePoint Export module for setup. The **SharePoint Server Logon** window displays.
2. From the **Server** list, select the repository server. If a server name was specified in the current task, the **Server** list will display that server. You cannot change a server name that was specified by a task.
3. In the **User name** field, type a valid user ID.
4. In the **Password** field, type a valid password.
5. In the **Domain** field, type a valid domain.
6. Click **Connect**. If the connection is successful, the corresponding server, user name, and domain information is added to the list of sessions.
7. Repeat steps 1-6 to connect to additional repository sessions.
8. Click **OK** to accept your connections and close the **SharePoint Server Logon** window. The **Microsoft SharePoint Export** window displays.
9. Process tasks.
10. Click **OK** to close the window.



**Note:** You are not required to specify a repository session connection during module startup. However, if you do not establish connections during login, and the module receives tasks that do not specify login credentials, you will either be prompted to connect at that time or an appropriate error will be logged, depending on how the module step error handling options are configured.

## Related Topics

“Setting Up Repository Sessions” on page 270

### 10.2.3 Disconnecting from Repository Sessions

Manage repository connections from the **SharePoint Server Logon** window.

**To disconnect from one or more repository sessions:**

1. Select the session from which you want to disconnect from the **Servers** list.
2. Click **Disconnect**.
3. Repeat steps 1 and 2 to disconnect from other sessions.

## 10.3 Reference—Microsoft SharePoint Export

The topics within this section contain reference information useful while using the application in setup or production.

### 10.3.1 Windows

#### 10.3.1.1 Definition Properties

Access the **Definition Properties** window from the **Export** tab in the **Microsoft SharePoint Export Setup** window . Click the **New** button to display the **Definition Properties** window. The window will also display if you select an existing definition set from the **Definition Set** list and click **Edit**. Settings in the **Definition Properties** window include:

**Table 10-1: Definition Properties window**

Element	Description
General tab	Displays the settings on the <b>General</b> tab for assigning basic settings and properties to the definition object.
Export File tab	Displays the settings on the <b>Export File</b> tab for assigning basic file handling rules and settings applied to the object during export.
Destination File tab	Displays the settings on the <b>Destination File</b> tab for assigning an export location and setting up file handling rules.
Document Settings tab	Displays the settings on the <b>Document Settings</b> tab for viewing basic properties and attributes assigned to the definition.

Element	Description
Listing tab	Displays the settings on the <b>Listing</b> tab for determining how the definition and associated objects should be catalogued and stored on the SharePoint Server.

#### 10.3.1.1.1 General tab

The following settings are available on the **General** tab of the **Definition Properties** window. Access the **Definition Properties** window from the **Microsoft SharePoint Export Setup** window **Export** tab.

Click the **New** button to display the **Definition Properties** window. The window will also display if you select an existing definition set from the **Definition Set** list and click **Edit**.

**Table 10-2: Microsoft SharePoint Export Setup General tab**

Element	Description
Definition Name	Type in a unique name for the new definition.
Sub-Site	Specify a location, in the format <code>/sites/SiteName</code> , where you want the document to be exported to on the Microsoft SharePoint Server. If this field is left blank, your documents will be exported to the default location on the server.  Alternatively, you can use an IA Value instead of a specifying a sub-site. Click <b>Browse</b> to open the <b>Choose Value</b> window, and then select the IA Value you want to specify for the sub-site.

Element	Description
<p><b>Document Library</b></p>	<p>In the <b>Document Library</b> field, select or type a document library where you want the document to be exported. The document libraries listed are specific to the repository server to which you are connected and represent specific areas on the repository server where folders and files reside. Because you have logged onto the Microsoft SharePoint Server, the list will be populated with the names of the document libraries that exist on the master site for the server. Only the document libraries on the master site are available for export.</p> <p>Alternatively, you can use an IA Value instead of a specifying a document library. Click <b>Browse</b> to open the <b>Choose Value</b> window, and then select the IA Value you want to specify for the document library.</p>


**10.3.1.1.2 Export File tab**

The following settings are available on the **Export File** tab of the **Definition Properties** window. Access the **Definition Properties** window from the **Microsoft SharePoint Export Setup** window **Export** tab.

Click the **New** button to display the **Definition Properties** window. The window will also display if you select an existing definition set from the **Definition Set** list and click **Edit**.

**Table 10-3: Export File tab**

Element	Description
<p><b>File Value</b></p>	<p>Select a <b>File Value</b> from the list box. The values in this list come directly from the values in the process containing the Microsoft SharePoint Export module step and represent the source file to be exported.</p>
<p><b>Copy the file without modification</b></p>	<p>Select this option when you do not want the file changed in any way during export. The source file can be of any type (document, image, or other binary file).</p>

Element	Description
<p><b>Save the file with these settings</b></p>	<p>Select this option if you want your image-only file to be converted in some way during export. Always select this option if you want to combine single-page image files into a multi-page file.</p> <ul style="list-style-type: none"> <li>• <b>File Type</b> – Select the image file type to export.</li> <li>• <b>Color Format</b> – Select the color format (binary, gray scale, 8-bit color, 24-bit color) to export.</li> <li>• <b>Compression</b> – Select the compression format (None, Group 4, packbits, etc.).</li> <li>• <b>Merge Annotations</b> – Select the <b>Merge Annotations</b> checkbox if your image contains annotations and you want them merged with the image.</li> </ul> <p> <b>Note:</b> Only single-page, Intelligent Capture compatible image files support this export mode. Using this option on non-image-only files may result in an error or an unreadable file. If the export module's input file is not image-only, you must use the <b>Copy The File Without Modification</b> option to export the file.</p>

#### 10.3.1.1.3 Destination File tab

The following settings are available on the **Destination File** tab of the **Definition Properties** window. Access the **Definition Properties** window from the **Microsoft SharePoint Export Setup** window **Export** tab.

Click the **New** button to display the **Definition Properties** window. The window will also display if you select an existing definition set from the **Definition Set** list and click **Edit**.

**Table 10-4: Destination File tab of the Definition Properties window**

Element	Description
<p><b>Initial Folder</b></p>	<p>Click <b>Browse</b> to display a pop-up menu, then do one of the following:</p> <ul style="list-style-type: none"> <li>• Click <b>Select</b> to specify the Initial Folder. The <b>Initial Folder</b> window displays the existing folders in the Document Library on the Microsoft SharePoint Server. Select the folder you want to use as the initial folder, and then click <b>OK</b>.</li> <li>• Click <b>IA Values</b> to open the <b>Choose Value</b> window. Select an IA Value that during production will resolve to the Initial Folder.</li> <li>• Type a name directly in the <b>Initial Folder</b> field and specify either a static Initial Folder path name or an <i>IA</i> Value that during production resolves to an initial folder path name. The initial folder you specify must exist on the repository server at the time the export occurs; the export module does not create the initial folders for you. Either forward or back slash characters can be used when specifying the initial folder path name.</li> </ul>
<p><b>Subfolders</b></p>	<p>Specify a subfolder of the initial folder by typing in a folder name. If no subfolder of that name exists when the export runs, it will create the folder. If you want to use an existing subfolder in the repository, make sure to double-check your spelling before moving on. If you misspell the subfolder name, the exporter will create a folder rather than using the existing folder.</p> <ul style="list-style-type: none"> <li>• Alternatively, click <b>Browse</b> to select an IA Value from the <b>Choose Value</b> window, or type an IA Value directly into the <b>Subfolders</b> field. The IA Value you specify must resolve to a valid subfolder name at export time.</li> </ul>


Element	Description
<p><b>File Name</b></p>	<p>The default setting for this required parameter generates file names based on a schema that uses the name of the batch and numbers documents incrementally. Optionally, you can create your own schema or type, but be aware that the export module will not overwrite files with duplicate names.</p> <p>For example, if you try to name all files “mybatch”, the module will create the first file, but the second and all subsequent files will generate an error. The result of this error depends on how you configure the module to handle errors.</p> <p>Click <b>Browse</b> to select an <i>IA</i> Value from the <b>Choose Value</b> window, or type one or more <i>IA</i> Values directly into the <b>File Name</b> field. The <i>IA</i> Value you specify must resolve to a valid and unique file name at export time</p>
<p><b>Extension</b></p>	<p>Specify the file name extension (without the period) of the files to be exported. In most cases, the file name extension should match the exported file type (as specified on the <b>Export File</b> tab).</p> <p>For example, if you export a <i>PDF</i> file, but specify a Microsoft Word extension (<i>DOC</i>), most workstations will try to open the file using Microsoft Word.</p> <p>Instead of a specifying a file name extension, you can click <b>Browse</b> to select an <i>IA</i> Value from the <b>Choose Value</b> window, or you can type one or more <i>IA</i> Values in the <b>Extension</b> text box. The <i>IA</i> Value you specify must resolve to the file name extension at run time.</p>

#### 10.3.1.1.4 Document Settings tab

The following settings are available on the **Document Settings** tab of the **Definition Properties** window. Access the **Definition Properties** window from the **Microsoft SharePoint Export Setup** window **Export** tab.

Click the **New** button to display the **Definition Properties** window. The window will also display if you select an existing definition set from the **Definition Set** list and click **Edit**.

**Table 10-5: Document Settings tab**

Element	Description
Properties	<p>Displays the property names and values that have been set up for the document. Properties can include Owner, Title, Description, and other properties that are specific to the Document Library selected for the document.</p> <p> <b>Note:</b> The Microsoft SharePoint Export module supports properties of type Single line text, Multiline text, Choice, Boolean, Currency, Number, Note, and DateTime.</p>
New	<p>Launches the <b>New Property</b> window which enables you to define a new property setting. From the <b>Property Name</b> list, select a property to associate with your document. In the <b>Property Value</b> field, assign a value to the selected property. The <b>Specifying definition properties</b> and <b>Creating, editing, or deleting document properties</b> sections contain instructions for adding new properties, or editing existing ones.</p>
Edit	<p>Displays the <b>Edit Property</b> window which allows you to edit the value of the selected property.</p>
Delete	<p>Deletes the selected property value from the list.</p>

#### 10.3.1.1.5 Listing tab

The following settings are available on the **Listing** tab of the **Definition Properties** window. Access the **Definition Properties** window from the **Microsoft SharePoint Export Setup** window **Export** tab.

Click the **New** button to display the **Definition Properties** window. The window will also display if you select an existing definition set from the **Definition Set** list and click **Edit**.

**Table 10-6: Microsoft SharePoint Export Setup window Listing tab**

Element	Description
Add Listing	<p>Select this checkbox to add a listing to the document when it is exported.</p>

Element	Description
<b>Location</b>	<p>Specify the <b>Location</b> where listings for the exported documents should be added. The <b>Area locations</b> must exist on the Microsoft SharePoint Server. These locations must be in the form, "&lt;location1;location2&gt;".</p> <p>Alternatively, you can click <b>Browse</b> and then do one of the following:</p> <ul style="list-style-type: none"> <li>• Click <b>Select</b> to select one or more locations from the <b>Listing Locations</b> window displaying the Area locations that are valid for the server. Select the locations that you want to contain a listing for the document when it is exported, and then click <b>OK</b>.</li> <li>• Click <b>IA Values</b> to select one or more IA Values from the <b>Choose Value</b> window. The IA Value you select must resolve to valid listing locations at run time.</li> </ul>
<b>Title</b>	<p>Specify the title for the listing. You can type the text or select to select one or more IA Values from the <b>Choose Value</b> window. The IA Value you select must resolve to a valid title at run time.</p>
<b>Description</b>	<p>Specify the description for the listing. You can type the text or select to select one or more IA Values from the <b>Choose Value</b> window. The IA Value you select must resolve to a valid description at run time.</p>

### 10.3.1.2 Initial Folder

The **Initial Folder** window is displayed from **Destination File** tab of the **Definition Properties** window. Access the **Definition Properties** window from the **Export** tab in the **Microsoft SharePoint Setup** window.

**Table 10-7: Microsoft SharePoint Setup Initial Folder window**

Element	Description
<b>Document library list</b>	<p>Select the folder you want to use as the initial folder from the list of available folders. The initial folder you specify must exist on the repository server at the time the export occurs because the export module does not create the initial folders.</p>
<b>OK</b>	<p>Click <b>OK</b> to set the initial folder</p>

Element	Description
Cancel	Click <b>Cancel</b> to close the <b>Initial Folder</b> window without saving changes.

### 10.3.1.3 Listing Locations

The **Listing Locations** window is displayed from **Listing** tab of the **Definition Properties** window. Access the **Definition Properties** window from the **Export** tab in the **Microsoft SharePoint Setup** window.

**Table 10-8: Microsoft SharePoint Setup Listing Locations window**

Element	Description
Area locations	Displays the <b>Area locations</b> that are valid for the Microsoft SharePoint Server. Select the locations that you want to contain a listing for the document when it is exported, and then click <b>OK</b> .
OK	Click <b>OK</b> to save the specified <b>Area Locations</b> .
Cancel	Click <b>Cancel</b> to exit the window without saving any settings.

### 10.3.1.4 Microsoft SharePoint Export

The following options are available in the **Microsoft SharePoint Export** window.

**Table 10-9: Microsoft SharePoint Export window**

Element	Description
File menu	Displays the options available from the module <b>File</b> menu for opening and closing batches, initiating export, establishing server sessions and setting up the step.
Run menu	Displays the options available from the module <b>Run</b> menu for running single batches or all batches.
Help menu	Provides access to the help system where you can find information to guide you while working in the module.
Toolbar	Displays the options available from the module <b>Toolbar</b> for controlling module production activities.
Status bar	Displays the information available from the module <b>Status bar</b> .

Element	Description
Task pane	<ul style="list-style-type: none"> <li>• <b>Task Progress:</b> The progress bar indicates the overall progress of task completion.</li> <li>• <b>Processing from batch:</b> Displays the name of the batch currently being processed.</li> <li>• <b>Instance:</b> Displays the name of the current step.</li> <li>• <b>Task Node:</b> Displays the name of the node currently being processed.</li> <li>• <b>Tasks remaining on server:</b> Displays the number of tasks in the current batch remaining on the server.</li> </ul>
Detail pane	Displays the details of every task performed by the module, including module startup, batch selections, and task progress. A date and time stamp for each task is listed.

#### 10.3.1.4.1 File Menu

The **File** menu of the **Microsoft SharePoint Export** window includes the following options:

**Table 10-10: Microsoft SharePoint Export File menu**

Element	Description
Sessions	Displays the <b>SharePoint Server Logon</b> window for establishing server sessions for batch processing of tasks without embedded session login information.
Open Batch	Displays the <b>Open Batch</b> window for selecting a batch for processing.
Close Batch	Closes an open batch.
Set Up Instance	Displays the <b>Microsoft SharePoint Export Setup</b> window, allowing you to specify custom settings for the Open Batch.
Export	Processes the open batch. A batch must be open for this option to be available on the menu.
Exit	Exits the Microsoft SharePoint Export module, closing all associated windows and components.

**10.3.1.4.2 Run Menu**

The **Run** menu of the **Microsoft SharePoint Export** window includes the following options:




**Table 10-11: Microsoft SharePoint Export Run menu**






Element	Description
All Batches	Runs the exporter on all currently open batches. Run All Batches is a Wait for Task mode (a mode in which you can only process batches that are queued on the Intelligent Capture Server for the module). In Run All Batches mode, the module receives any queued tasks from any open batch as the tasks become available from the Intelligent Capture Server.
Single Batch	Runs the exporter on a single batch. Run Single Batch is a Wait for Task mode. In Run Single Batch mode, you choose a single queued batch to process.
Stop	Stops all processing. Cancels processing of the current task and stop accepting tasks from the Intelligent Capture Server.

**10.3.1.4.3 Toolbar**

The **Microsoft SharePoint Export** window toolbar provides you with buttons to launch or close export processes.

**Table 10-12: Microsoft SharePoint Export toolbar**

Button	Button Name	Description
	Sessions	Displays the <b>Microsoft SharePoint Server Logon</b> window so you can open server sessions for batch processing of tasks without embedded session logon information.
	Open Batch	Displays the <b>Open Batch</b> window for selecting an available batch to process.
	Close Batch	Closes an open batch.

Button	Button Name	Description
	<b>Set Up Step</b>	Displays the <b>Microsoft SharePoint Export Setup</b> window, allowing you to specify custom settings for the open batch.
	<b>Export</b>	Processes the open batch.
	<b>Run All Batches</b>	Runs the exporter on all currently open batches. Run All Batches is a Wait for Task mode (a mode in which you can only process batches that are queued on the Intelligent Capture Server for the module). In Run All Batches mode, the module receives any queued tasks from any open batch as the tasks become available from the server.
	<b>Run Single Batch</b>	Runs the exporter on a single batch. Run Single Batch is a Wait for Task mode. In Run Single Batch mode, you choose a single queued batch to process.
	<b>Stop</b>	Cancels processing of the current task and stops the module from accepting additional tasks from the server.

#### 10.3.1.4.4 Status Bar

The **Status bar** of the **Microsoft SharePoint Export** window includes the following information:

**Table 10-13: Microsoft SharePoint Export status bar**

Element	Description
<b>Current status</b>	Displays messages indicating the current state of the module.
<b>Number of images processed</b>	Shows the number of images the module has processed since it was last started. If no images have been processed, then no number appears.

Element	Description
Domain \ name	Shows the domain and name of the current user.
InputAccel Server	Displays the name of the Intelligent Capture Server that sent the task currently being processed. This information can be important when you are processing tasks with a module that is connected to a ScaleServer group.

### 10.3.1.5 Microsoft SharePoint Export Setup

The **Microsoft SharePoint Export Setup** window includes the following options:


**Table 10-14: Microsoft SharePoint Export Setup window**

Element	Description
Logon tab	Displays the options on the <b>Logon</b> tab for establishing a connection to the Microsoft SharePoint Server and for configuring automatic logon.
Export tab	Displays the options on the <b>Export</b> tab for creating, modifying, and deleting definitions, selecting a definition to export, and establishing rules that prompt the system when to create a document.
Errors tab	Displays the options on the <b>Errors</b> tab for configuring error handling and recovery.
Logging tab	Displays the options on the <b>Logging</b> tab for setting up logging of informational and error messages, and determining a save location for the errors log file.
Info tab	Displays the options on the <b>Info</b> tab for verifying step and server connection properties.
OK	Click <b>OK</b> to save the settings defined in the <b>Microsoft SharePoint Setup</b> window.
Cancel	Click <b>Cancel</b> to close the <b>Microsoft SharePoint Setup</b> window without saving any setting changes.

### 10.3.1.5.1 Logon tab

The **Microsoft SharePoint Export Setup** window **Logon** tab settings include:

**Table 10-15: Microsoft SharePoint Export Setup Logon tab**

Element	Description
Server	<p>In the <b>Server</b> field, select the repository server to be connected to. The list of servers available to the module is configured during installation of the repository client software.</p> <p> <b>Note:</b> Use the SharePoint Server name if connecting to SharePoint Server 2010. The export functionality may not work as expected if you connect to SharePoint Server 2010 using its IP address. If using the Fully Qualified Domain Name (FQDN) of the SharePoint Server 2010, make sure SharePoint Server 2010 is configured to accept requests sent by a fully qualified domain.</p>
User name	<p>In the <b>User name</b> field, enter a valid user ID for the selected repository server.</p>
Password	<p>In the <b>Password</b> field, enter a valid password.</p>
Domain	<p>In the <b>Domain</b> field, type a valid domain.</p>
Connect	<p>If the module is able to connect to the repository server, the <b>Connection Status</b> field shows the connection information. If the module is not able to connect, select a different server or supply different connection credentials.</p>

Element	Description
<p><b>Automatic Logon</b></p>	<ul style="list-style-type: none"> <li>• <b>Use the above user and password for tasks sent to this step:</b> Select the checkbox if you want to use the information supplied in the <b>Server, User Name, Password</b> and <b>Domain</b> fields to automatically log in when tasks are sent to this step.</li> <li>• <b>Disconnect When:</b> Select the disconnect event for task-based connections from the list box:                             <ul style="list-style-type: none"> <li>– <b>The task is finished:</b> The module disconnects from the repository or server when the task finishes. Select this option if you have a limited number of licenses and need to connect from multiple clients.</li> <li>– <b>A task with different login information is received:</b> The module remains connected to the specified repository or server until it receives a task that specifies different credentials. It then disconnects from any other task-based connections before connecting using the new task's credentials. Select this option when most tasks are exported to a single repository or server as this requires fewer logout/login cycles can improve performance.</li> <li>– <b>The module exits:</b> Once connection to the server is established, the module remains connected to this server until it exits. Select this option when you have sufficient licenses for all clients that are simultaneously accessing the server. This results in fewer logout/login cycles and can improve performance.</li> </ul> </li> </ul>
<p><b>Disconnect</b></p>	<p>Closes the selected server connection.</p>

Element	Description
Connection status	<p>The <b>Connection Status</b> field at the bottom of the tab displays one of the following:</p> <ul style="list-style-type: none"> <li>• When <b>Connected to &lt;server_name&gt; as &lt;user_ID&gt;</b> displays, the module is already logged in with the credentials indicated. If this connection is valid for setting up the current Microsoft SharePoint Export step, perform other setup tasks and then click <b>OK</b> to save your settings and exit setup mode.</li> <li>• When <b>Connected to &lt;server_name&gt; as &lt;user_ID&gt;</b> displays but the connection is not valid for setting up the current Microsoft SharePoint Export step, click <b>Disconnect</b>.</li> <li>• When <b>Not connected</b> displays, you are not logged in to the Microsoft SharePoint Export module.</li> </ul>

#### 10.3.1.5.2 Export tab

The **Microsoft SharePoint Export Setup** window **Export** tab settings include:

**Table 10-16: Microsoft SharePoint Export Setup Export tab**

Element	Description
Definition Set	Displays the list of defined definitions. Use the <b>New</b> , <b>Edit</b> , and <b>Delete</b> buttons to modify this list.
Definition to Export	Displays the list of definitions to export. Use the <b>Add</b> , <b>Edit</b> , and <b>Delete</b> buttons to modify this list. Click the <b>Browse</b> button to display the <b>Choose Value</b> window for inserting an IA Value to use as the export definition.
Create a new document when this value changes	Determines when a new document will be created. Click the <b>Browse</b> button to display the <b>Choose Value</b> window for inserting an IA Value to use as the export definition.

### 10.3.1.5.3 Errors tab

The **Microsoft SharePoint Export Setup** window **Errors** tab settings specify how the module should respond when an error occurs during processing.

The options you select will depend primarily on whether you are planning to use the module in an attended or unattended mode during production. Error handling options also determine what happens when the module receives a task that specifies a server for which it does not have credentials.

**Table 10-17: Microsoft SharePoint Export Setup Errors tab**

Element	Description
When an Error Occurs	<p>Select the <b>Prompt for an action</b> or <b>Automatically respond with the following actions</b> depending on whether or not production will occur on an attended or unattended workstation.</p> <ul style="list-style-type: none"> <li>• <b>Prompt for an action:</b> This option is for attended workstations only. Selecting this option suspends processing until the operator responds to the production error window.</li> <li>• <b>Automatically respond with the following actions:</b> This option is for unattended workstations or when operator intervention is not necessary. You can specify the following settings when this option is selected. <ul style="list-style-type: none"> <li>– <b>Abort entire task:</b> Aborts the current task and returns an appropriate <code>ExportResult IA Value</code>, which is evaluated by instructions in the <i>IPP</i> <code>Finish</code> event handler. The module may or may not continue processing other tasks depending on how you set the remaining options in this section. If you do not plan to provide error handling in your IPP, you should select the default settings of <b>Abort entire task</b> and <b>Set the batch priority to 0</b> when automatically responding to errors to avoid repeated attempts to process a node with errors.</li> <li>– <b>Skip node that produced the error and continue with remaining nodes:</b> Skips the node where error occurred and attempts to continue with the remaining nodes in the task, if any. The module returns an appropriate <code>ExportResult IA Value</code> for the node that produced the error occurred, which is evaluated by instructions in the <code>Finish</code> event handler of the IPP.</li> <li>– <b>Stop receiving tasks after current task:</b> Stops receiving tasks from the Intelligent Capture Server when an error occurs in the current task. This is equivalent to the operator choosing the <code>Stop</code> command.</li> <li>– <b>Set the batch priority to 0:</b> Sets the batch priority of the current task to 0</li> </ul> </li> </ul>

Element	Description
	<p>when an error occurs. This takes the batch off line, preventing further processing by any module until the administrator resets the batch priority. When this check box is cleared, the batch priority is not changed and batch processing continues as before the error occurred as specified in the IPP Error event handler (when you select <b>Abort entire task</b>) or in the Finish event handler (when you select <b>Skip node that produced the error and continue with remaining nodes</b>) in response to the ExportResult IA Value.</p>
<p><b>Recovery Options</b></p>	<ul style="list-style-type: none"> <li>• <b>Automatically retry n times before reporting error:</b> Select the checkbox if you want the module to automatically retry processing the task that caused an error. Specify the number of times it should retry in the field to the right. Some error conditions can cease to exist upon subsequent attempts at processing a task. For example, a temporary file or record lock in the repository server might cause an error, but might be resolved by the time the module attempts to process the task again. Clear the checkbox if you do not want the module to retry tasks that produce errors.</li> <li>• <b>Skip nodes that have already been successfully processed by this step:</b> Prevents the module from reprocessing nodes that have already been successfully processed. When this field is cleared, the module will reprocess all nodes in the task, even those that have already been successfully processed.</li> </ul>



**Note:** When the module encounters an error in a task during production and no error routine has been provided in the *IPP*, the task finishes with an error and is re-queued. The task will then be re-submitted to the module for processing and will most likely cause an error again, and will repeat this cycle indefinitely. If you do not plan to provide error handling in your IPP, it is recommended that you select the default settings of **Abort Entire Task** and **Set The Batch Priority To 0** when automatically responding to errors to avoid this error retry situation. Select **Automatically Respond With The Following Options** if you will be running the module in unattended mode.

#### 10.3.1.5.4 Logging tab

The **Microsoft SharePoint Export Setup** window **Logging** tab settings enable you to specify how the module should record error messages and informational messages as it processes tasks during production. The options you select will depend primarily on whether you want to have a log of error messages, informational messages, or both, and where you want to save the log(s).

**Table 10-18: Microsoft SharePoint Export Setup Logging tab**

Element	Description
<b>Log messages to a file</b>	Enable to log messages to a specified file. When selected, the <b>Severity to log</b> and <b>File name</b> options become active. <ul style="list-style-type: none"> <li>• <b>Severity to log:</b> From the list box, select:               <ul style="list-style-type: none"> <li>– <b>Errors Only:</b> to log only error messages.</li> <li>– <b>Errors and Information:</b> to log both errors and informational messages.</li> </ul> </li> <li>• <b>File name:</b> Contains the name and location of the log file name. You can use the <b>Browse</b> button to point to the file location from the <b>Select</b> window. When you log messages to a shared location and are running multiple copies of the module, you must specify a unique log file name for each module step by specifying the appropriate IA values in the file name.</li> </ul>
<b>Send error messages to the InputAccel Server Event Log</b>	Logs error messages to the Intelligent Capture Server.

#### 10.3.1.5.5 Info tab

The **Microsoft SharePoint Export Setup** window **Info** tab displays module and server information. This is information only and cannot be edited from this tab. Modification of any of these properties must be completed during module setup.


**Table 10-19: Microsoft SharePoint Export Setup Info**

Element	Description
<p><b>Instance Properties</b></p>	<ul style="list-style-type: none"> <li>• <b>Name:</b> The name of the module step as declared in the <i>IPP</i>.</li> <li>• <b>Departments:</b> The names of departments defined in the batch or process.</li> <li>• <b>Process/Batch name:</b> The name of the batch or process that contains the module step.</li> <li>• <b>Process/Batch ID:</b> The unique ID number of the batch or process that contains the module step.</li> </ul>
<p><b>InputAccel Server Connection</b></p>	<ul style="list-style-type: none"> <li>• <b>Server name:</b> The Intelligent Capture Server name that is connected to the client workstation. This is the server that owns the batch or process you are setting up .</li> <li>• <b>Username:</b> The domain and user ID specified when the connection to the Intelligent Capture Server was established in setup mode.</li> </ul>
<p><b>About</b></p>	<p>Click <b>About</b> to display information about the module, such as version number and copyright details.</p>

### 10.3.1.6 SharePoint Server Logon

The following options are available from the **SharePoint Server Logon** window:

**Table 10-20: SharePoint Server Logon window**

Element	Description
<p><b>Server</b></p>	<p>Type the name or the IP address of the Microsoft SharePoint Server. You can use secure <i>HTTP</i> protocol (<i>HTTPS</i>) to connect to the SharePoint Server.</p> <p> <b>Note:</b> Use the SharePoint Server name if connecting to SharePoint Server 2010. The export functionality may not work as expected if you connect to SharePoint Server 2010 using its IP address. If using the Fully Qualified Domain Name (FQDN) of the SharePoint Server 2010, make sure SharePoint Server 2010 is configured to accept requests sent by a fully qualified domain.</p>

Element	Description
<b>User name:</b>	Type a valid user name in the text box.
<b>Password</b>	Type a valid password for the specified user name in the text box.
<b>Domain</b>	Type valid domain information for the specified user in the text box.
<b>You will remain connected to the following sessions until the module exits</b>	Displays a list of connected sessions: <ul style="list-style-type: none"> <li>• <b>Server:</b> Displays the name of the server to which the module is connected.</li> <li>• <b>User name:</b> Displays the name of the user logged in to the server session.</li> <li>• <b>Domain:</b> Displays the domain in which the server resides.</li> </ul>
<b>Connect</b>	Click the <b>Connect</b> button to initiate a connection to the server, once all required fields, such as <b>Server</b> , <b>User name</b> , <b>Password</b> , and <b>Domain</b> , have been provided.
<b>OK</b>	Click <b>OK</b> to save the Login information, close the <b>SharePoint Server Logon</b> window, and display the <b>Microsoft SharePoint Export</b> window.
<b>Disconnect</b>	Select the connection to close from the <b>Server</b> list, then click the <b>Disconnect</b> button to close the selected connection.

## 10.3.2 IA Values

The topics in this section describe IA values that can be used with this application.

### 10.3.2.1 Input IA Values

Input IA Values include input file variables, such as **Input Image**, which serve as pointers to stage files, and input processing variables, which store setup data that a module uses to process tasks, including default and user-defined module settings.

**Table 10-21: Input IA Values**

IA Value	Description
InputImage	<p>The task's input image on the Intelligent Capture Server. <b>InputImage</b> may be any image file processed by upstream modules. Use of an <b>InputImage</b> is optional; the module can export file values from other modules in the process. When all trigger values are non-zero, the module will process the current task.</p> <ul style="list-style-type: none"> <li>• Attributes: File, Input, Trigger</li> <li>• Level: 0</li> </ul>
Level<n>_InputFile	<p>The input file for the task. The corresponding file can be of any type whose data you may want to export. The module will not modify this file in any way. Use of a <b>Level&lt;n&gt;_InputFile</b> is optional; the module can export file values from other modules in the process.</p> <ul style="list-style-type: none"> <li>• Attributes: File, Input, NoTrigger</li> <li>• Level: &lt;n&gt; (where &lt;n&gt; = 0-7)</li> </ul>
Level<n>_Processed	<p>Set this value to 0 to re-export a task. You can also set this value to 1 to exclude files associated with the node from being exported.</p> <ul style="list-style-type: none"> <li>• Attributes: Long, Input, NoTrigger</li> <li>• Level: &lt;n&gt; (where &lt;n&gt; = 0-7)</li> </ul>

### 10.3.2.2 Output IA Values

Output IA Values are output processing variables, which store data generated by the module during processing.

**Table 10-22: Output IA Values**

IA Value	Description
Output values	
Level0_FullPath	<p>Gives the full path name of the exported file on the Microsoft SharePoint Server.</p> <ul style="list-style-type: none"> <li>• Attributes: String, Output</li> </ul>
Output status and error variables	

IA Value	Description
ErrorResult	<p>If the task exported successfully, this value is zero. Any non-zero value indicates an error occurred.</p> <ul style="list-style-type: none"> <li>Attributes: Long, Output</li> <li>Level: T</li> </ul>
ErrorNumber	<p>The error number of the last error that occurred during processing of the task.</p> <ul style="list-style-type: none"> <li>Attributes: Long, Output</li> <li>Level: T</li> </ul>
ErrorText	<p>The error text of the last error that occurred during processing of the task.</p> <ul style="list-style-type: none"> <li>Attributes: String, Output</li> <li>Level: T</li> </ul>
Level <n>_ErrorNumber	<p>The error number of an error that occurred during processing of the node.</p> <ul style="list-style-type: none"> <li>Attributes: Long, Output</li> <li>Level: &lt;n&gt; (where &lt;n&gt; = 0-7)</li> </ul>
Level <n>_ErrorText	<p>The error text of an error that occurred during processing of the node.</p> <ul style="list-style-type: none"> <li>Attributes: String, Output</li> <li>Level: &lt;n&gt; (where &lt;n&gt; = 0-7)</li> </ul>
Output statistical variables	
Operator	<p>Logon name of the operator who processed the task.</p> <ul style="list-style-type: none"> <li>Attributes: String, Output</li> <li>Level: T</li> </ul>
StartDate	<p>Logon name of the operator who processed the task.</p> <ul style="list-style-type: none"> <li>Attributes: String, Output</li> <li>Level: T</li> </ul>
StartTime	<p>Time the task was started in 24-hour format &lt;hh:mm:ss&gt;. For example, 17:25:00 indicates the start time was 5:25 pm.</p> <ul style="list-style-type: none"> <li>Attributes: String, Output</li> <li>Level: T</li> </ul>

IA Value	Description
EndTime	<p>Time the task was completed in 24-hour format &lt;hh:mm:ss&gt;. For example, 17:35:00 indicates the end time was 5:35 pm.</p> <ul style="list-style-type: none"> <li>• Attributes: String, Output</li> <li>• Level: T</li> </ul>
TotalTime	<p>Number of milliseconds it took to complete the task.</p> <ul style="list-style-type: none"> <li>• Attributes: Long, Output, Prime</li> <li>• Level: T</li> </ul>
Level<n>_Processed	<p>A value that is set to 1 after each level &lt;n&gt; node in the task has been processed, where &lt;n&gt; is 0-7.</p> <ul style="list-style-type: none"> <li>• Attributes: Long, Output</li> <li>• Level: &lt;n&gt; (where &lt;n&gt; = 0-7)</li> </ul>
Level<n>_StartDate	<p>The time at which processing on the level &lt;n&gt; node commenced, where &lt;n&gt; is 0-7.</p> <ul style="list-style-type: none"> <li>• Attributes: String, Output</li> <li>• Level: &lt;n&gt; (where &lt;n&gt; = 0-7)</li> </ul>
Level<n>_StartTime	<p>The time at which processing on the level &lt;n&gt; node commenced, where &lt;n&gt; is 0-7.</p> <ul style="list-style-type: none"> <li>• Attributes: String, Output</li> <li>• Level: &lt;n&gt; (where &lt;n&gt; = 0-7)</li> </ul>
Level<n>_EndDate	<p>The date on which processing on the level &lt;n&gt; node completed, where &lt;n&gt; is 0-7.</p> <ul style="list-style-type: none"> <li>• Attributes: String, Output</li> <li>• Level: &lt;n&gt; (where &lt;n&gt; = 0-7)</li> </ul>
Level<n>_EndTime	<p>The time at which processing on the level &lt;n&gt; node completed, where &lt;n&gt; is 0-7.</p> <ul style="list-style-type: none"> <li>• Attributes: String, Output</li> <li>• Level: &lt;n&gt; (where &lt;n&gt; = 0-7).</li> </ul>
Level<n>_TotalTime	<p>The total time to process the level &lt;n&gt; node, where &lt;n&gt; is 0-7.</p> <ul style="list-style-type: none"> <li>• Attributes: Long, Output</li> <li>• Level: &lt;n&gt; (where &lt;n&gt; = 0-7)</li> </ul>

## Chapter 11

# Export for OpenText Content Server

This section includes the Intelligent Capture specialized enterprise export module: **ecpcore-cxo**.

For information about common features and functionalities in the Intelligent Capture client modules, see *OpenText Intelligent Capture - Module Reference (ECPCORE-CMD)*.

The Export for OpenText Content Server module exports image and non-image data from Intelligent Capture batches directly into OpenText Content Server. Content Server is a client-server document storage and retrieval system. It provides powerful search and document management on the Web.



**Note:** Livelink ECM – Enterprise Server (also known as Livelink, Livelink Server, Livelink Enterprise Server, and LES) has been renamed to OpenText Content Server. The Intelligent Capture software user interface and product documentation, including this guide, might also see OpenText Content Server as Livelink.

The Export for OpenText Content Server is compatible with multiple versions of the OpenText Content Server software. See the *Intelligent Capture Release Notes* (available in My Support (<https://support.opentext.com/>)) for information on the supported OpenText Content Server versions.

## 11.1 Features

Export for OpenText Content Server features include:

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### Exports setup information and data to a Content Server

Provides a direct connection between the Export for OpenText Content Server module and a Content Server. This connection enables you to pass module setup information and, ultimately, production data to the Content Server system. This connection can be secured by using an *SSL*.

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### Routes captured data to a Content Server workspace or workflow

Organizes and automates the workflow in a Content Server system by exporting captured data to an enterprise workspace, personal workspace, or by Object ID and Volume ID. The enterprise workspace stores documents and other information generally available to all Content Server users. The user personal workspace provides a view of the items that relate to that user. A workflow is the data and step assignments that travel along a workflow path, which includes attachments, attributes, and comments made by workflow users.

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### Processes pages using item definitions and export lists

Provides the ability to configure settings based on item definitions, which specify how to process a group of pages during export. Item definitions are

contained within an export list. This export list specifies the item definitions to use to process groups of pages. It also determines the parent-child relationship between items. The export list can also be used to define a hierarchy in Content Server. With item definitions, you export multiple file types or stage files to multiple locations without defining multiple steps of the module in a process.

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**Provides version control management on exported data**

Uses permissions to restrict the ability of Content Server users to access and work with exported items in the Content Server system. With Export for OpenText Content Server, exported data automatically inherits the permissions of its container. You can modify these inherited permissions, as well as grant permissions for additional users or groups. Additionally, you can select which users or groups can access your exported data and establish what they can do with that data.

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**Define categories and attributes**

Export for OpenText Content Server enables you to specify categories and assign attribute values for exported items. A category is a classification of attributes. An attribute is a field that stores unique information about an item that helps identify an item. For example, an accounting department can include a category labeled "Travel Voucher." The Travel Voucher category of documents can include attributes such as "Last Name" and "P.O. Number." The categories and attribute values influence how exported data is stored, retrieved, presented for display, and processed in the Content Server system.

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## 11.2 Setting Up Export for OpenText Content Server

Most configuration information for Intelligent Capture client modules is defined during *module setup*. You can run a module in setup mode from Intelligent Capture Designer, from Intelligent Capture Administrator, or from a command prompt with appropriate arguments. For more information, see *OpenText Intelligent Capture - Module Reference (ECPCORE-CMD)*.


When launched in setup mode, a client module displays the **Setup** window in which you can specify the module's configuration settings.

### 11.2.1 Converting Processes from OpenText Livelink Export to Export for OpenText Content Server

To convert processes from OpenText Livelink Export to Export for OpenText Content Server, the high-level steps are: generate new licenses for the module, recompile your processes using a new *MDF*, reinstall your processes, and reconfigure your settings.

**To update a process to use Export for OpenText Content Server:**

1. Install new licenses for Export for OpenText Content Server onto the Intelligent Capture Server.
2. Open the *IPP* containing the old MDF file, *Iaex11.mdf*.

3. Change any steps to use the new MDF, Ex112.mdf.
  4. Remove all references to the following IA Values, as they no longer exist in Export for OpenText Content Server:
    - `<Level<x>_Category_L<y>>`
    - `<Level<x>_AttributeName_L<y>_<z>>`
    - `<Level<x>_AttributeType_L<y>_<z>>`
    - `<Level<x>_AttributeLength_L<y>_<z>>`
    - `<Level<x>_AttributeValue_L<y>_<z>>`
  5. Set your category and attribute values in item definitions in setup mode, and then optionally set the definition through the IPP using the **Definition IA Value**.
  6. Change your `<InputFile><n>` file input values to the format `<Level<x>_InputFile>`. `<x>` is the level and `<n>` is the `<n>`th input file for that level.
  7. Remove all references to the following IA Values: `<ExportObjectID>` and `<ExportVolumeID>`. Instead, set these values in setup mode from the **Location** tab.
  8. (Optional) Change the step name to reflect the usage of the new module.
  9. (Optional) If you were previously exporting multiple file types with multiple steps of the module, remove the extra steps. You can now export multiple file types using a single step of the module by **Configuring Item Definitions** for each file type.
  10. (Optional) Change your Export for OpenText Content Server step to handle errors in the Error event handler instead of the Finish event handler.
-  **Note:** Earlier custom export modules always returned Success and so required errors to handle in the Finish event handler in the IPP. Export for OpenText Content Server additionally fires the Error event, but only when a task finishes with a Failure status. This status happens if an error occurs that prevents the remaining pages in the task from exporting. The module can still finish with Success after an error provided it can process the rest of the pages in the task. Update your IPP to handle both cases.
11. Recompile your IPP. (When you recompile, you can change your IPP name to reflect the usage of different modules within the process.)
  12. Install the new or modified process on the Intelligent Capture Server.
  13. Change your module configuration settings using the instructions in **Setting export options**. Setup instructions have changed for this module since the last version.
  14. Test before putting into production.

## 11.2.2 Logging on to the Content Server

You can log on to the Content Server using one of these methods:

- Run Export for OpenText Content Server in setup mode. The **Logon** tab displays in the **Export for OpenText Content Server Setup** window.
- Enabling automatic login is an optional feature. It enables Export for OpenText Content Server to process tasks for multiple servers in an unattended mode by using the credentials specified during step setup.
- The **Content Server Logon** window displays when you start the module in production mode and are not already logged on to a server. You can also display the **Content Server Logon** window from the **Export for OpenText Content Server** window by selecting **Sessions** from the **File** menu or clicking the **Sessions** button from the **Toolbar**.



**Note:** For more information on how to set up a secure connection when working with secure servers, see [Using Export for OpenText Content Server with Secure Connect](#).

See the following topics for additional information related to logging on to a Content Server:

- [“Logging on to the Content Server for Setup” on page 308](#)
- [“Setting Up Livelink Secure Connect” on page 309](#)

### 11.2.2.1 Logging on to the Content Server for Setup

To set up Export for OpenText Content Server, first log on to the Content Server.

#### To log on to the Content Server:

1. Run Export for OpenText Content Server in setup mode.
2. Select the **Logon** tab.
3. Specify the **Server**, **Database**, **User name**, and **Password Domain** fields, enter valid information.
4. Click **Connect**. If the module is able to connect to the Content Server, the **Connection Status** field displays “Connected to server\_name as user\_ID”.
5. Perform other setup tasks described in this section, then click **OK** to save your settings and close the module.
  - To connect to a different server, click **Disconnect** and repeat the process.
6. Under **Automatic Logon**, enable or disable automatic logon options.
7. Perform other setup tasks as necessary and click **OK** to save your settings and exit setup mode.

### 11.2.2.2 Setting Up Livelink Secure Connect

Before you can make secure connections from Export for OpenText Content Server, set up Livelink Secure Connect on each Export for OpenText Content Server machine. The following is a summary of the necessary steps. See the Export for OpenText Content Server latest documentation to be certain you are using the latest tested installation recommendations.

#### To set up Livelink Secure Connect:

1. Contact OpenText Global Technical Services at My Support (<https://support.opentext.com>) to obtain the Secure Connect product.
2. Install Secure Connect as recommended by the documentation provided with it. Install Secure Connect on each Export for OpenText Content Server machine for which to establish secure connections to a Content Server.
3. Obtain a Base-64 Encoded X.509 Certificate of Authority for each of the servers to which you are connecting.
4. On each Export for OpenText Content Server machine, install the Certificate of Authority files. Install one for each secure Content Server in the `certs` subfolder of the Secure Connect installation folder. See the Livelink Secure Connect documentation for more information.
5. After installing the Secure Connect module, use any of the following three connection methods: in the **Logon** tab of the **Setup** window, in the **Logon** window for production mode, or in the production mode command line arguments.
  - *Standard connection:* You can continue to make a standard, non-secure connection to your servers in the same manner as before installing Secure Connect: specify `<session_name>` or `<session_name>:<port>`.
  - *Non-secure Tunneling:* Specify the Content Server in a format such as: `http://<myhost>/livelink/livelink.exe` or `http://<myhost>:<port>/livelink/livelink.exe`. Unless you specify a port number, the connection uses the standard **HTTP** port (80).
  - *Secure Tunneling:* Specify the Content Server server in a format such as: `https://<mysecurehost>/livelink/livelink.exe` or `https://<mysecurehost>:<port>/livelink/livelink.exe`. Unless you specify a port number, the connection uses the standard **HTTPS** port (443).

### 11.2.2.3 Disconnecting from a Content Server Session

**To disconnect from a Content Server session:**

1. In the list of connections in the lower portion of the **Content Server Logon** window, select the connection you want to disconnect.
2. Click **Disconnect**.
3. Repeat steps 1 and 2 to disconnect from other sessions.
4. Click **OK** to close the window.

### 11.2.3 Setting Export Options

The process of setting export options includes several procedures that can be categorized into two groups:

- **Configure item definitions** which define the settings for a Content Server object.
- **Creating export lists** which enable the item definitions to process based on the specified definition settings.

Both of these tasks are accomplished from the **Export** tab of the **Export for OpenText Content Server Setup** window

Organize and automate the workflow in your Content Server system by exporting captured data to an Enterprise Workspace, Personal Workspace, Workflow, or Object ID and Volume ID. The Enterprise Workspace stores documents and other information generally available to all Content Server users. Each user's Personal Workspace provides a view of the items that relate to that user. A Workflow is the data and step assignments that travel along a workflow path, which includes attachments, attributes, and comments made by workflow users.

#### 11.2.3.1 Configuring the Export tab

The **Export** tab specifies how Export for OpenText Content Server processes a task and what the module exports.

**To configure the Export tab:**

1. Run Export for OpenText Content Server in setup mode.
2. Verify that there is a connection to a Content Server on the **Logon** tab. If not, specify the necessary logon parameters and click **Connect** to establish the connection.
3. Select the **Export** tab.
4. Within the **Definition set** area, create, edit, delete, or copy an item definition.
5. Within the **Export list** area, select the items you want to export and their hierarchy.

6. Perform other setup tasks as necessary and click **OK** to save your settings and exit setup mode.

### Related Topics

[“Configuring Item Definitions” on page 312](#)

[“Creating Item Definitions” on page 312](#)

### 11.2.3.2 Creating Export Lists

The export list specifies the item definitions to process groups of pages, determine the parent-child relationship between items, and define a hierarchy in Content Server. Whenever the export list name, definition, or parent-item changes, then the export list item is processed. For example, if ScanPlus is set up to create a level 1 every two pages, set up the same hierarchy in Export for OpenText Content Server. Set up your Content Server export list to create a Content Server folder for every level 1. When the export list item is processed, two folders appear in Content Server as “Example2-1” and “Example2-2”.

#### To specify an export list:

1. Run the Export for OpenText Content Server module in setup mode.
2. Select the **Export** tab.
3. Select **Add** to add an item to the **Export** list. A blank row is added into the list.
4. Within the **Name** area, type a name for the item to export or select **Browse** to use an IA Value in naming the item to export.
5. Within the **Definition Name** area, select the item definition to export or select **Browse** to use an IA Value in specifying the item definition to export.
6. Selecting an item in the **Export** list to define the parent-child relationships between items: use the arrow buttons to the parent-child relationship or to create an item hierarchy in Content Server. The check icon (✓) indicates that the item uses a valid position in the list and parent-child relationship. The exclamation point icon (!) indicates that an item position in the list is invalid.
7. To edit an item in the list, select the name of the item and then select **Edit**.
8. To delete an item in the list, select the name of the item and then select **Delete**.
9. To disable the **Auto-Select Definition** feature, right-click an item in the **Export** list and select **Auto-Select Definition**. This feature highlights a definition associated to an item in the **Definition set** list box. By default, this feature is enabled.
10. Perform other setup tasks as necessary and click **OK** to save your settings and exit setup mode.

## Related Topics

[“Configuring Item Definitions” on page 312](#)

[“Setting Export Options” on page 310](#)


### 11.2.3.3 Configuring Item Definitions

Export for OpenText Content Server enables you to configure item definitions used to specify how to process a group of pages. The export list specifies the item definitions used to process groups of pages, and determines the parent-child relationship between items. The export list can also be used to define a hierarchy in Content Server. When exporting items based on item definitions, you can export multiple file types or stage files to multiple locations without creating multiple steps of the module.

#### 11.2.3.3.1 Creating Item Definitions

An item definition determines how you want the module to process a group of pages.

##### To create an item definition:

1. Run Export for OpenText Content Server in setup mode.
  2. Verify that there is a connection to a Content Server on the **Logon** tab. If not, specify the necessary logon parameters and click **Connect** to establish the connection.
  3. Select the **Export** tab.
  4. Within the **Definition set** area, select **Create**. The **Definition** window displays. Select the **Item tab**.
  5. In the **Definition name** field, type a name for your item definition.
  6. From the **Object type** list, choose the item type (**Document**, **Compound Document**, **Folder**, or **Workflow**).
-  **Note:** When you select the **Compound Document** or **Workflow** options, the tabs on the **Definition** window change to reflect your selection.
7. Select the **Set/modify description** check box and type a comment in the text box to include a description for the item that is exported to Content Server. You can also select **IA Value** to select an IA Value to use in describing the item to export. Clear the **Set/modify description** check box if you do not want to specify a description for the item.
  8. In the **Folder item types only** section, select **Generate error if item exists** check box when you want the module to generate an error if the item exists in Content Server. The module uses the error handling settings specified in the **Errors** tab.

9. In the **Workflow item types** only section, select **Browse**. The **Select Workflow Map** window displays. Select a workflow to export to and click **OK**. The name of the workflow you selected displays in the corresponding field.
10. Perform other setup tasks on the remaining tabs as necessary to create an item definition and click **OK** to close the **Definitions** window.
11. Repeat steps 3 through 9 to create additional item definitions.
12. To edit an item definition, select the item definition and click **Edit**.
13. To create a copy of an item definition, select the item definition and click **Copy**.
14. To delete an item definition, select the item definition and click **Delete**.
15. Click **OK** to save your settings and exit setup mode. Your settings are saved to the Intelligent Capture Server.

#### 11.2.3.3.2 Specifying an Export Location

The **Location** tab enables you to specify where to store the items on the Content Server and the hierarchy used to store them.

##### To specify an export location for an item definition:

1. Run Export for OpenText Content Server in setup mode.
2. Select the **Export** tab.
3. Within the **Definition set** area, select an item definition and click **Edit**. The **Definition** window displays.
4. Select the **Location** tab.
5. Within the Item reference area, define how you want the module to reference the item to export:
  - **Name in export list:** Select this option to reference a Content Server object with the name of the export list item that uses this definition.
  - **Object ID:** Select this option to reference Content Server Object ID and Volume ID values. Enter the Content Server Object ID and Volume ID. Or, select the **Browse** button where you can select an IA Value to use in naming the Object ID and Volume ID.
6. Select **Create new item if item does not exist** to update existing items. If the item exists, the module generates an error and uses the settings defined on the **Errors** tab.
7. Within the **Parent reference** area, select how you want the module to reference the parent item:
  - **Relative position in export list:** Select this option to make the export location of the item relative to the export location of its parent item in the export list. An item in the root position in the export list (left-most), cannot

have a relative path. Only items with an absolute path can be in the root position.

- **Content Server path:** Select this option to reference a location on the Content Server. In the **Path** text box, enter a path. Or, select the **Browse** button to select an IA Value. The IA Value references the parent location. Or you can select the **Browse** button to open the **Select Content Server Location** window and browse to a parent location on the Content Server.
  - **Object ID:** Select this option if you want to reference Content Server Object ID and Volume ID values. Enter the Content Server Object ID and Volume ID. Or, select **Browse** where you can select an IA Value to use in naming the Object ID and Volume ID.
8. Click **OK** to save your settings and exit setup mode.

## Related Topics

[“Configuring Item Definitions” on page 312](#)

[“Specifying File Setup Options” on page 314](#)

[“Setting Categories and Attributes” on page 316](#)

[“Defining Object and System Attribute Values” on page 317](#)

[“Defining Workflow Map Attributes” on page 318](#)

[“Setting Permissions” on page 319](#)

[“Specifying Version Control Options” on page 321](#)

[“Specifying Revisions/Releases Options \(for Compound Documents\)” on page 323](#)

### 11.2.3.3 Specifying File Setup Options

The **File Setup** tab specifies the name, mime type, and image conversion options for the content file exported to Content Server.

#### To specify the file setup options:

1. Run Export for OpenText Content Server in setup mode.
2. Select the **Export** tab.
3. Within the **Definition set** area, select an item definition and click **Edit**. The **Definition** window displays.
4. Select the **File Setup** tab.
5. Select **Export file** to modify or add content files to Content Server. Clear this check box when you only want to modify attribute values, permissions, etc., but do not want to export content files.

6. Within the **File source** area, select a stage file available in your process or batch from the **File Value** list.
7. Select one of the following options:
  - **Copy the file without modification:** Copies content files from Intelligent Capture to the Content Server without image conversions.
  - **Save the file with these settings:** Enables you to specify image conversion options. You can select the appropriate **File Type**, **Color Format**, and **Compression** options. Select **Merge Annotations** to save annotations with your image file.



**Note:** If you specify a file that supports multipage, then status<n>=1 for the first page in a multipage file above level 0. All other pages in the multipage file are status<n>=0. Since a multipage file is being exported, only the first page in the file is newly created (status<n>=1). The other pages are part of the file (status<n>=0). Multipage file types include .dcx, .pda, .tif, and .pdf.

8. In the **File name** field, type the file name and extension for the content file. Or, select **Browse** to select an IA Value to use in naming the content file. This name is not the stage file name of the exported name.



**Note:** Provide the file extension as well as the file name in the **File name** field.

9. From the **Mime Type** list, select the file type that specifies the mime type. Or, select **Browse** to select an IA Value to use in selecting the mime type of the items to export. Content Server uses this option to determine which file type to use when displaying the file on the Content Server.



**Note:** The **Mime Type** setting overrides any specific settings to the **File Type**, even if you have selected **Copy the file without modification**. For example, if you have set your **File Type** to *PDF* but set your **Mime Type** to *BMP*, after exporting the attributes of both **File Type** and **Mime Type** are set to BMP. Therefore make sure your **Mime Type** matches the type of files you are exporting.

10. Perform other setup tasks as necessary and click **OK** to save your settings and exit setup mode.

## Related Topics

[“Configuring Item Definitions” on page 312](#)

[“Specifying an Export Location” on page 313](#)

[“Setting Categories and Attributes” on page 316](#)

[“Defining Object and System Attribute Values” on page 317](#)

“Defining Workflow Map Attributes” on page 318

“Setting Permissions” on page 319

“Specifying Version Control Options” on page 321

“Specifying Revisions/Releases Options (for Compound Documents)” on page 323

#### 11.2.3.3.4 Setting Categories and Attributes

Export for OpenText Content Server enables you to specify categories and assign attribute values for each item. A category is a classification or grouping of attributes. An attribute is a field storing information such as Name and Social Security Number that help to identify an item uniquely.

For example, the accounting department can include a category labeled Travel Voucher. The Travel Voucher category of documents can include such attributes as Last Name and P.O. Number. The categories and attribute values you assign to your exported data influence how it is stored, retrieved, presented for display, and processed in your Content Server system. Categories and attribute values can also be defined in the *IPP*. Category and attribute values defined in your IPP override any category and attribute values specified during module setup.

The **Categories** tab enables you to specify categories and attribute values.

To specify a category and assign values to its attributes:

1. Run Export for OpenText Content Server in setup mode.
2. Select the **Export** tab.
3. Within the **Definition set** area, select an item definition and click **Edit**. The **Definition** window displays.
4. Select the **Categories** tab.
5. Select **Add Category** to add a new category. The **Select Category** window displays.
6. Select a category on the Content Server and click **OK**. The **Categories** tab reappears displaying the new category and its attributes.
7. Repeat steps 5 and 6 to add additional categories.
8. In the **Name/Value** list, select an attribute value and click **Edit** to modify the attribute value. The Attribute value field displays.
9. Type an attribute value directly into this field or click **Browse** and select an IA Value to assign to the attribute.
10. Repeat steps 8 and 9 to modify values for additional attributes.
11. To add an attribute row, or value, select an attribute and select **Add Row**. The **Value** text box displays. Enter a value. Or, select **Browse** to select an IA Value to

assign to the attribute. Then, select outside of the text box to set the value. If no additional attribute rows are allowed, the **Add Row** button is not available. The maximum number of attribute rows allowed for an attribute is indicated in the Rows column.

12. To view properties for a category or attribute, select the category or attribute, and select **Properties**.
13. To delete a category or attribute, select the category or attribute, and select **Delete**.
14. Click **OK** to save your settings and exit setup mode.

### Related Topics

[“Configuring Item Definitions” on page 312](#)

[“Specifying an Export Location” on page 313](#)

[“Specifying File Setup Options” on page 314](#)

[“Defining Object and System Attribute Values” on page 317](#)

[“Defining Workflow Map Attributes” on page 318](#)

[“Setting Permissions” on page 319](#)

[“Specifying Version Control Options” on page 321](#)

[“Specifying Revisions/Releases Options \(for Compound Documents\)” on page 323](#)

#### 11.2.3.3.5 Defining Object and System Attribute Values

In addition to attributes associated with a category, every item on the Content Server contains object and system attributes. The **Properties** tab enables you to modify these attributes.



**Note:** Content Server 9.0 does not support the modification of object attributes.

#### To specify object and system attribute values:

1. Run Export for OpenText Content Server in setup mode.
2. Select the **Export** tab.
3. Within the **Definition set** area, select an item definition and click **Edit**. The **Definition** window displays.
4. Select the **Properties** tab.
5. Within the **Object attributes** or **System attributes** area, select an attribute check box to enable the **Edit** button and modify the value. Clear the check box to use its default value.

6. Click **Edit**. A text box displays in the **Value** list.
7. Type a value directly into the text box or select **Browse** to assign an IA Value to the attribute.
8. Repeat steps 5 through 7 to modify additional attribute values.
9. Click **OK** to save your settings and exit setup mode.

### **Related Topics**

[“Configuring Item Definitions” on page 312](#)

[“Specifying an Export Location” on page 313](#)

[“Specifying File Setup Options” on page 314](#)

[“Setting Categories and Attributes” on page 316](#)

[“Defining Workflow Map Attributes” on page 318](#)

[“Setting Permissions” on page 319](#)

[“Specifying Version Control Options” on page 321](#)

[“Specifying Revisions/Releases Options \(for Compound Documents\)” on page 323](#)

#### **11.2.3.3.6 Defining Workflow Map Attributes**

All workflows on the Content Server contains object and system attributes. The **Workflow Attributes** tab enables you to set or modify values for your workflow attributes.

##### **To specify workflow attribute values:**

1. Run Export for OpenText Content Server in setup mode.
2. Select the **Export** tab.
3. Within the **Definition set** area, select an item definition and click **Edit**. The **Definition** window displays.
4. Select **Workflow** as the **Object type** and specify a valid workflow map in the **Workflow item types** section of the **Definition** window.
5. Select the **Workflow Attributes** tab.
6. Select the attribute value you want to modify and select **Edit**. A text box displays in the **Name/Value** list.
7. Type a value directly into the text box or select **Browse** to assign an IA Value to the attribute.
8. Repeat steps 5 and 6 to modify additional attribute values.

9. To define addition attributes, select the attribute and then select **Add Row**. If no additional attribute rows are allowed, the **Add Row** button is not available. The maximum number of attribute rows allowed for an attribute is indicated in the **Rows** column.
10. To display properties for an attribute, select the attribute and then select **Properties**.
11. To delete an attribute value, select the attribute and then select **Delete**.
12. Click **OK** to save your settings and exit setup mode.

### **Related Topics**

[“Configuring Item Definitions” on page 312](#)

[“Specifying an Export Location” on page 313](#)

[“Specifying File Setup Options” on page 314](#)

[“Setting Categories and Attributes” on page 316](#)

[“Defining Object and System Attribute Values” on page 317](#)

[“Setting Permissions” on page 319](#)

[“Specifying Version Control Options” on page 321](#)

[“Specifying Revisions/Releases Options \(for Compound Documents\)” on page 323](#)

#### **11.2.3.3.7 Setting Permissions**

Permissions are settings that restrict the ability of Content Server users to see and work with items in the Content Server system. In the Export for OpenText Content Server module, your exported data automatically inherits the permissions of its container. The module enables you to modify these inherited permissions, as well as grant permissions for additional users or groups. You can select which users or groups can access your exported data and establish what they can do with that data.

The **Permissions** tab displays the users and groups that have permission to access the item to export. Each item on the Content Server has a set of permissions associated with it. By default, an item inherits the permissions of its parent item.

#### **To specify permissions:**

1. Run Export for OpenText Content Server in setup mode.
2. Select the **Export** tab.
3. Within the **Definition set** area, select an item definition and click **Edit**. The **Definition** window displays.
4. Select the **Permissions** tab.

5. From the **Default permission entries** list, select a default user or group whose permissions you want to modify. Clear the default user check box if you want to use the permissions of its parent item.
6. From the list of permissions in the right panel, select the permissions to enable. Clear the check box to disable the specified permission option. The permission options are unavailable if the user check box is not selected.
  - *See*: Enables the user to view the exported folder or document.
  - *See Contents*: Enables the user to view the contents of the exported folder or document.
  - *Modify*: Enables the user to modify the exported folder or document.
  - *Edit Permissions*: Enables the user to modify permissions for a folder or document.
  - *Edit Attributes*: Enables the user to edit attributes for a folder or document.
  - *Delete Versions*: Enables the user to delete versions of a folder or document.
  - *Delete*: Enables the user to delete information in a folder or document.
  - *Reserve*: Write-locks a Content Server item and prevents other users from modifying the item or checking it out.
7. Repeat step 5 and 6 for each user or group permissions you want to modify.
8. To grant permissions to a new user or group, click **Select**. The **Select User** window displays.
9. From the **Search** list, select a search parameter.
10. In the text box, type a name or keyword to search for or leave the text box blank to list all available names.
11. Select **Find**. The search results appear in the **Name** list.
12. From the **Name** list, select a user or group and click **OK**. The **Permissions** tab displays with the new user or group in the **Access List**.
13. From the list of permission options in the right panel, define the permissions for the new user or group as described in step 6.
14. Repeat steps 8 through 13 for each new user or group you want to add.
15. Click **OK** to save your settings and exit setup mode.

## Related Topics

[“Configuring Item Definitions” on page 312](#)

[“Specifying an Export Location” on page 313](#)

[“Specifying File Setup Options” on page 314](#)

[“Setting Categories and Attributes” on page 316](#)

[“Defining Object and System Attribute Values” on page 317](#)

[“Setting Permissions” on page 319](#)

[“Specifying Version Control Options” on page 321](#)

[“Specifying Revisions/Releases Options \(for Compound Documents\)” on page 323](#)

#### 11.2.3.3.8 Specifying Version Control Options

The Content Server system can store multiple versions of a document. Content Server automatically creates a version of a document while retaining previous versions. Export for OpenText Content Server module enables you to specify whether to:

- Create a version of an existing document
- Overwrite the previous version
- Create a document and delete any old versions
- Generate an error and act as defined in error setup.

Export for OpenText Content Server also has similar options for managing multiple revisions and releases of a compound document. Configure these settings on the **Revisions/Releases** tab.

The Content Server system enables you to create multiple versions of a document. In the **Versions** tab, specify version control options if the document being exported exists on the Content Server.

##### To specify version control options:

1. Run Export for OpenText Content Server in setup mode.
2. Select the **Export** tab.
3. Within the **Definition set** area, select an item definition and click **Edit**. The **Definition** window displays.
4. Select the **Versions** tab.
5. Within the **If the document already exists on the Content Server server** area, specify how the module handles documents that exist on the Content Server:
  - **Add version:** Creates a version of the document while retaining previous versions.
  - **Modify current version:** Replaces the current version of the document.
  - **Delete the document and create new one:** Deletes all previous versions of the document and replaces it with the new document.

- **Generate error:** Generates an error if the document exists and uses error handling settings defined on the **Errors** tab.



**Note:** If you select either the **Add Version** or **Delete the document and create new one** option, also select the **Export file** check box on the **File Setup** tab. Add a content file to the Content Server when creating a version; otherwise, a runtime error (-7005) occurs.

6. Select **Set/modify max. versions** to change the maximum number of versions of the document allowed in Content Server. Type a number in the text box or select **Browse** to use an IA Value to specify the maximum number of versions allowed. By default, the maximum number of versions is set to -1 (unlimited).
7. In the **Version lock** list, select one of the following options to set delete protection:
  - *Do not set/modify:* Does not change the version lock settings.
  - *Lock:* Enables version lock.
  - *Unlock:* Disables version lock.
8. Click **OK** to save your settings and exit setup mode.

## Related Topics

[“Configuring Item Definitions” on page 312](#)

[“Specifying an Export Location” on page 313](#)

[“Specifying File Setup Options” on page 314](#)

[“Setting Categories and Attributes” on page 316](#)

[“Defining Object and System Attribute Values” on page 317](#)

[“Setting Permissions” on page 319](#)

[“Specifying Version Control Options” on page 321](#)

[“Specifying Revisions/Releases Options \(for Compound Documents\)” on page 323](#)

### 11.2.3.3.9 Specifying Revisions/Releases Options (for Compound Documents)

On the **Revisions/Releases** tab, specify revision and release options when the compound document to export exists on the Content Server.

#### To specify Revision/Release options:

1. Run Export for OpenText Content Server in setup mode.
2. Select the **Export** tab.
3. Within the **Definition set** area, select an item definition and click **Edit**. The **Definition** window displays.
4. From the **Object type** list, choose **Compound Document**.
5. Select the **Revisions/Releases** tab.
6. Within the **If the Compound Document contains a reserved subitem** area, select one of the following options to specify how you want the module to handle the compound document that contains a reserved subitem:
  - **Create**: The module creates a revision or release of the compound document.
    - From the **Create** list, select whether you want the module to create a revision or release.
    - In the **Number** field, type the revision or release number or select **Browse** to use an IA Value to number the revision or release. If you do not specify a number, Content Server will increment the revision or release number by one.
    - In the **Name** field, type a name for the compound document or select **Browse** to use an IA Value in naming the compound document.
    - Within the **If the Compound Document contains a reserved subitem** area, select one of the following options to specify how you want the module to handle the compound document that contains a reserved subitem:
      - Generate an error**: This option generates an error and uses the error handling settings defined in the **Errors** tab.
      - Generate a warning**: This option generates an error and uses the error handling settings defined in the **Errors** tab.
      - Ignore reservation flags**: Continues creating a compound document without a warning or error.
  - **Modify current compound document**: This option replaces the current compound document with a new revision or release.
  - **Delete the compound document and create new one**: This option deletes all previous revisions or releases of the compound document and replaces it with a new one.

- **Generate error:** This option generates an error if the compound document exists. The module uses the error handling settings defined in the **Errors** tab.

7. Click **OK** to save your settings and exit setup mode.

### Related Topics

[“Configuring Item Definitions” on page 312](#)

[“Specifying an Export Location” on page 313](#)

[“Specifying File Setup Options” on page 314](#)

[“Setting Categories and Attributes” on page 316](#)

[“Defining Object and System Attribute Values” on page 317](#)

[“Setting Permissions” on page 319](#)

[“Specifying Version Control Options” on page 321](#)

[“Specifying Revisions/Releases Options \(for Compound Documents\)” on page 323](#)

## 11.3 Running Export for OpenText Content Server in Production

After the module has been set up, tested, and placed in a production environment, operators and administrators will run the module in production.

For information related to common production tasks for unattended modules, see *Running Modules in Production Mode* in the *OpenText Intelligent Capture - Module Reference (ECPCORE-CMD)* guide.



**Note:** The *Running Modules in Production Mode* section contains production topics that are common to many unattended modules and may not apply to this module.

### 11.3.1 Logging on to Content Server Sessions

Each task the module receives identifies a Content Server session where to export the data for that task. The list of existing, active sessions displays in the lower portion of the window. Each task contains a user ID and password to enable fully automated connection and unattended export to the Content Server and database specified in the task. Optionally, you can also log in to one or more Content Server sessions when you start the module in production mode.

There are two types of connections:

- Task-based connections are not necessarily persistent. The task can direct the module to disconnect when the connection is no longer needed. Connecting and

disconnecting from sessions takes time. However, it can be useful when security is a concern or when you are operating with a limited number of Content Server licenses.

- Module-based connections are persistent. The module remains connected to each session specified when the module is running until the module exits. Connecting once and remaining connected results in faster task processing but can also result in security compromises or more simultaneous connections, which require more Content Server licenses.



**Note:** For more information on how to set up a secure connection when working with secure Content Server, see [Using Export for OpenText Content Server with Secure Connect](#).

### 11.3.2 Using Export for OpenText Content Server with Secure Connect

To use Export for OpenText Content Server over an *SSL* secure connection with the Content Server, you can connect through the Livelink Secure Connect module.

For more information, see [“Setting Up Livelink Secure Connect” on page 309](#).

## 11.4 Reference—Export for OpenText Content Server

The topics within this section contain reference information useful while using the application in setup or production.

### 11.4.1 Windows

The topics within this section provide descriptions of windows accessible from the application. The topics list the user interface element name and include a brief description of actions available from the window.

#### 11.4.1.1 Definition

The **Definition** window displays from the [Export for OpenText Content Server Setup](#) window when you select the **Export** tab and click **Create**, or select an existing item definition and then click **Edit** from within the **Definition set** area. For instructions on using the **Definition** window to configure an item definition, see [Configuring an item definition](#).

**11.4.1.1.1 Item tab**

Settings on the **Definition** window, **Item** tab include:

**Table 11-1: Definition Window, Item tab**

Element	Description
Definition name	Type a name for your item definition.
Object type	<p>Select the appropriate item type</p> <ul style="list-style-type: none"> <li>• <b>Document</b></li> <li>• <b>Compound Document</b></li> <li>• <b>Folder</b></li> <li>• <b>Workflow</b></li> </ul> <p>When you select the <b>Compound Document</b>, <b>Folder</b>, or <b>Workflow</b>, the options in the <b>Definition</b> window change to reflect your selection.</p>
Set/modify description	<p>Select the <b>Set/modify description</b> check box and type a comment in the text box to include a description for the item that is exported to Content Server. You can also click <b>IA Value</b> to select an IA Value to use in describing the item to be exported. Clear the <b>Set/modify description</b> check box if you do not want to specify a description for the item.</p>
Generate error if item exists	<p>When specifying <b>Folder</b> item types, select the check box when you want the module to generate an error if the item already exists in Content Server. The module will use the error handling settings specified in the <b>Errors</b> tab.</p>
Workflow item types only	<p>When specifying the <b>Workflow</b> item type, click <b>Browse</b>. The <b>Select Workflow Map</b> window displays. Select a workflow to export to and click <b>OK</b>. The name of the workflow you selected displays in the corresponding field.</p>

### 11.4.1.1.2 Location tab

The **Location** tab enables you to specify where to store items on the Content Server and the hierarchy used to store them.

**Table 11-2: Definition Window, Location tab**

Element	Description
<b>Item reference</b>	Define how you want the module to reference the item to be exported: <ul style="list-style-type: none"> <li>• <b>Name in export list:</b> Select this option to reference a Content Server object with the name of the export list item that uses this definition.</li> <li>• <b>Object ID:</b> Select this option to reference Content Server Object ID and Volume ID values. Enter the Content Server <b>Object ID</b> and <b>Volume ID</b> or select the <b>Browse</b> button where you can select an IA Value to use in naming the <b>Object ID</b> and <b>Volume ID</b>.</li> </ul>
<b>Create new item if item does not exist</b>	Select this option to update existing items. If the item already exists, the module generates an error and uses the settings defined on the <b>Errors</b> tab.
<b>Parent reference</b>	Select how you want the module to reference the parent item: <ul style="list-style-type: none"> <li>• <b>Relative position in export list:</b> Select this option to make the item's export location relative to the export location of its parent item in the export list. An item in the root position in the export list (left-most), may not have a relative path. Only items with an absolute path can be in the root position.</li> <li>• <b>Content Server path:</b> Select this option to reference a location on the Content Server. In the <b>Path</b> text box, enter a path or select the <b>Browse</b> button to select an IA Value to use in referencing the parent location or to open the <b>Select Content Server Location</b> window and browse to a parent location on the Content Server.</li> <li>• <b>Object ID:</b> Select this option if you want to reference Content Server <b>Object ID</b> and <b>Volume ID</b> values. Enter the Content Server <b>Object ID</b> and <b>Volume ID</b> or select <b>Browse</b> where you can select an IA Value to use in naming the <b>Object ID</b> and <b>Volume ID</b>.</li> </ul>

## Related Topics

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[“Specifying an Export Location” on page 313](#)

[“Specifying File Setup Options” on page 314](#)

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[“Specifying Revisions/Releases Options \(for Compound Documents\)” on page 323](#)

### 11.4.1.1.3 File Setup tab

The **File Setup** tab specifies the name, mime type, and image conversion options for the content file exported to Content Server.

**Table 11-3: Definition Window, File Setup tab**

Element	Description
<b>Export file (required if creating a new document version)</b>	Select <b>Export file</b> to modify or add content files to Content Server. Clear this check box when you only want to modify attribute values, permissions, etc., but do not want to export content files.

Element	Description
<b>File source</b>	<ul style="list-style-type: none"> <li>• <b>File Value:</b> Select a stage file available in your process or batch from the <b>File Value</b> list.</li> <li>• <b>Copy the file without modification:</b> Copies content files from Intelligent Capture to the Content Server without image conversions.</li> <li>• <b>Save the file with these settings:</b> Enables you to specify image conversion options. Select the appropriate <b>File Type</b>, <b>Color Format</b>, and <b>Compression</b> options. Select <b>Merge Annotations</b> to save annotations with the image file.</li> </ul> <p> <b>Note:</b> If you specify a file type that supports multipage (.dcx, .pda, .tif, .pdf), then status&lt;n&gt;=1 for the first page in a multipage file above level 0. All other pages in the multipage file are status&lt;n&gt;=0. Since a multipage file is being exported, only the first page in the file is newly created (status&lt;n&gt;=1). The other pages are part of the file (status&lt;n&gt;=0).</p>
<b>File name</b>	<p>In the <b>File name</b> field, type the file name attribute for the content file in Content Server or select <b>Browse</b> to select an IA Value to use in naming the content file. This is not the stage file name of the exported name.</p>
<b>Mime Type</b>	<p>From the <b>Mime Type</b> list, select the file type which specifies the mime type or select <b>Browse</b> to select an IA Value to use in choosing the mime type of the items to be exported. Content Server uses this option to determine which file type to use when displaying the file on the Content Server.</p> <p> <b>Note:</b> The <b>Mime Type</b> setting overrides any specific settings to the <b>File Type</b>, even if you have selected <b>Copy the file without modification</b>. For example, if you have set your <b>File Type</b> to <i>PDF</i> but set your <b>Mime Type</b> to <i>BMP</i>, after exporting the attributes of both <b>File Type</b> and <b>Mime Type</b> are set to BMP. Therefore make sure your <b>Mime Type</b> matches the type of files you are exporting.</p>

## Related Topics

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### 11.4.1.1.4 Categories tab

The **Categories** tab enables you to specify categories and attribute values.

**Table 11-4: Definition Window, Categories tab**

Element	Description
<b>Add Category</b>	Click <b>Add Category</b> to add a new category. The <b>Select Category</b> window displays. Select a category on the Content Server and click <b>OK</b> . The <b>Categories</b> tab reappears displaying the new category and its attributes.
<b>Add Row</b>	To add an attribute row, or value, select an attribute and click <b>Add Row</b> . The <b>Value</b> text box displays. Enter a value or click <b>Browse</b> to select an IA Value to assign to the attribute, and then select outside of the text box to set the value. If no additional attribute rows are allowed, the <b>Add Row</b> button will be unavailable. The maximum number of attribute rows allowed for an attribute is indicated in the <b>Rows</b> column.
<b>Edit</b>	In the <b>Name/Value</b> list box, select an attribute value and then click <b>Edit</b> to modify the attribute value. The Attribute's value field displays. Type an attribute value directly into this field or click <b>Browse</b> and select an IA Value to assign to the attribute.
<b>Properties</b>	To view properties for a category or attribute, select the category or attribute, and then click <b>Properties</b> . The <b>Entered By Properties</b> window provides the information.

Element	Description
Delete	To delete a category or attribute, select the category or attribute, and then select <b>Delete</b> .

## Related Topics

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### 11.4.1.1.5 Properties tab

In addition to attributes associated with a category, every item on the Content Server contains object and system attributes. The **Properties** tab enables you to modify these attributes.



**Note:** Content Server 9.0 does not support the modification of object attributes.

**Table 11-5: Definition Window, Properties tab**

Element	Description
<b>Object attributes</b> and <b>System attributes</b> areas	Within the <b>Object attributes</b> or <b>System attributes</b> area, select an attribute check box to modify its value. This enables the <b>Edit</b> button. Clear the check box to use its default value.
<b>Edit</b>	To modify a value, select <b>Edit</b> . A text box displays in the <b>Value</b> list box. Type a value directly into the text box or select <b>Browse</b> to assign an IA Value to the attribute.

## Related Topics

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#### 11.4.1.1.6 Workflow Attributes tab

All workflows on the Content Server contain object and system attributes. The **Workflow Attributes** tab enables you to set or modify values for your workflow attributes.



**Note:** To define workflow attributes, first select **Workflow** as your **Object type** and specify a valid **workflow map** in the **Workflow item types** section of the **Definition** window.

**Table 11-6: Definition Window, Workflow Attributes tab**

Element	Description
<b>Edit</b>	Select the attribute value you want to modify and select <b>Edit</b> . A text box displays in the <b>Name/Value</b> list box. Type a value directly into the text box or select <b>Browse</b> to assign an IA Value to the attribute.
<b>Add Row</b>	To define addition attributes, select the attribute and then select <b>Add Row</b> . If no additional attribute rows are allowed, the <b>Add Row</b> button will be unavailable. The maximum number of attribute rows allowed for an attribute is indicated in the <b>Rows</b> column.
<b>Properties</b>	To display properties for an attribute, select the attribute and then select <b>Properties</b> .
<b>Delete</b>	To delete an attribute value, select the attribute and then select <b>Delete</b> .

### Related Topics

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#### 11.4.1.1.7 Permissions tab

The **Permissions** tab displays the users and groups that have permission to access the item to export. Each item on the Content Server has a set of permissions associated with it. By default, an item inherits the permissions of its parent item.

**Table 11-7: Definition Window, Permissions tab**

Element	Description
Default permission entries	From the <b>Default permission entries</b> list box, select a default user or group whose permissions you want to modify. Clear the default user's check box if you want to use the permissions of its parent item.
Permissions	<p>When a permission entry is selected, the name of the entry is displayed in the right window pane, and the permissions list for that individual or group displays. Select the check boxes to specify the permissions level for the selected individual or group.</p> <ul style="list-style-type: none"> <li>• <i>See</i>: Displays the exported folder or document.</li> <li>• <i>See Contents</i>: Displays the contents of the exported folder or document.</li> <li>• <i>Modify</i>: Modifies the exported folder or document.</li> <li>• <i>Edit Permissions</i>: Modifies permissions for a folder or document.</li> <li>• <i>Edit Attributes</i>: Edits attributes for a folder or document.</li> <li>• <i>Delete Versions</i>: Deletes versions of a folder or document.</li> <li>• <i>Delete</i>: Deletes information in a folder or document.</li> <li>• <i>Reserve</i>: Write-locks a Content Server item and prevents other users from making any changes to the item or checking it out.</li> </ul>

Element	Description
<b>Access list</b>	Additional users or groups that have been given permissions.
<b>Select</b>	To grant permissions to a new user or group, click <b>Select</b> . The <b>Select User</b> window displays. From the <b>Search</b> list box, select a search parameter. In the text box, type a name or keyword to search for or leave the text box blank to list all available names. Select <b>Find</b> . The search results appear in the <b>Name</b> list box. From the <b>Name</b> list box, select a user or group and click <b>OK</b> . The <b>Permissions</b> tab displays with the new user or group in the <b>Access List</b> . From the list of permission options in the right panel, define the permissions for the new user or group.

## Related Topics

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### 11.4.1.1.8 Versions tab

The Content Server system enables you to create multiple versions of a document. In the **Versions** tab, specify version control options when the document being exported exists on the Content Server.

**Table 11-8: Definition Window, Versions tab**

Element	Description
<p><b>If the document already exists on the Content Server</b></p>	<p>Enables you to specify how the module should handle documents that already exist on the Content Server.</p> <ul style="list-style-type: none"> <li>• <b>Add version:</b> Creates a new version of the document while retaining previous versions.</li> <li>• <b>Modify current version:</b> Replaces the current version of the document.</li> <li>• <b>Delete the document and create new one:</b> Deletes all previous versions of the document and replaces it with the new document.</li> <li>• <b>Generate error:</b> Generates an error if the document already exists and uses error handling settings defined on the <b>Errors</b> tab.</li> </ul> <p> <b>Note:</b> If you select either the <b>Add Version</b> or <b>Delete the document and create new one</b> option, you must also select the <b>Export file</b> check box on the <b>File Setup</b> tab. Content Server requires that a content file be added to the Content Server when creating a version; otherwise, a runtime error (-7005) will occur.</p>
<p><b>Set/modify max. versions</b></p>	<p>Select <b>Set/modify max. versions</b> to change the maximum number of versions of the document allowed in Content Server. Type a number in the text box or select <b>Browse</b> to use an IA Value to specify the maximum number of versions allowed. By default, the maximum number of versions is set to -1 (unlimited).</p>
<p><b>Version lock</b></p>	<p>Select one of the following options to set delete protection:</p> <ul style="list-style-type: none"> <li>• <b>Do not set/modify:</b> Does not change the version lock settings.</li> <li>• <b>Lock:</b> Enables version lock.</li> <li>• <b>Unlock:</b> Disables version lock.</li> </ul>

## Related Topics

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#### 11.4.1.1.9 Revisions/Releases tab

In the **Revisions/Releases** tab, you can specify revision and release options when the compound document to export exists on the Content Server.

 **Note:** The **Revisions/Releases** tab only displays when you have **Compound Document** selected as your **Object type**.

**Table 11-9: Definition Window, Revisions/Releases tab**

Element	Description
<p>If the compound document already exists on the Content Server</p>	<ul style="list-style-type: none"> <li>• <b>Create:</b> The module creates a new revision or release of the compound document. From the <b>Create</b> list box, select whether you want the module to create a revision or release.</li> <li>• <b>Number:</b> Type the revision or release number or select <b>Browse</b> to use an IA Value to number the revision or release. If you do not specify a number, Content Server will increment the revision or release number by one.</li> <li>• <b>Name:</b> Type a name for the compound document or select <b>Browse</b> to use an IA Value in naming the compound document.</li> </ul>
<p>If the compound document contains a reserved subitem:</p>	<ul style="list-style-type: none"> <li>• <b>Generate an error:</b> Generates an error using the error handling settings defined on the <b>Errors tab</b>.</li> <li>• <b>Generate a warning:</b> Generates a warning using the error handling settings defined in the <b>Errors tab</b>.</li> <li>• <b>Ignore reservation flags:</b> Continues creating a compound document without a warning or error.</li> </ul>
<p>Modify current compound document</p>	<p>This option replaces the current compound document with a new revision or release.</p>

Element	Description
Delete the compound document and create new one	This option deletes all previous revisions or releases of the compound document and replaces it with a new one.
Generate error	This option generates an error if the compound document already exists. The module uses the error handling settings defined in the <b>Errors</b> tab.

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### 11.4.1.2 Content Server Logon Window

If you did not specify login information for your batches, you can establish sessions from the **Content Server Logon** window.

The **Content Server Logon** window displays when you run Export for OpenText Content Server:

- Unless you have specified `-autostart` on the command line.
- When you select **Sessions** from the **File** menu while in the **Export for OpenText Content Server** window.
- Whenever a task tries to connect but does not include a **user ID** or **password**, and that task specifies **Prompt for an action** in its error handling setup.



**Note:** If all tasks have saved login information, click **OK** in this window to open the production window.

**Table 11-10: Content Server Logon Window**

Element	Description
<b>Server</b>	Select or type the name of the repository server in this field. You can optionally specify a port number after the server name. If a port number is not specified, the module will use the default port number, 2099. Example: "ServerName:2098"
<b>Database</b>	Specify a valid database for the selected server. If a database is not specified, the default database is used.
<b>User name</b>	The user name applied when the module receives a task from this step.
<b>Password</b>	Enables the specified user to access the repository server when a task from this module step is received.
<b>Domain</b>	Specify the network domain for the selected server.
<b>Connect</b>	The <b>Connect</b> button is activated when you select the <b>Use Windows Login</b> check box, or you specify the <b>User Name</b> and <b>Password</b> for logon. This connects you to the repository server.
<b>You will remain connected to the following sessions until the module exits</b>	Indicates the current sessions to which you are connected.
<b>Disconnect</b>	Disconnects from the selected session.

### 11.4.1.3 Open Batch

The **Open Batch** window enables you to select a batch to run when you are in production mode.

- Select the **Show only Batches with Tasks** check box to view only batches that have tasks queued for Export for OpenText Content Server.
- Select **Refresh** to view the updated list of batches.

### 11.4.1.4 Export for OpenText Content Server

The **Export for OpenText Content Server** window is the control center for running and monitoring export tasks.

**Table 11-11: Export for OpenText Content Server Window**

Element	Description
<b>File menu</b>	Enables you to open and process batches, and open sessions for those batches.
<b>Run menu</b>	Enables you to run all available batches or a single selected batch.
<b>Help menu</b>	Provides access to the help system where you can find information to guide you while working in the module.
<b>Toolbar</b>	The Export for OpenText Content Server toolbar provides you with buttons to open sessions, run, and close export processes.
<b>Task Progress</b>	An expanding bar represents the current task progress.
<b>Processing from batch</b>	The name of the batch that is being processed.
<b>Instance</b>	The name of the step the batch is based on.
<b>Task Node</b>	The current node being processed.
<b>Tasks remaining on server</b>	The number of tasks remaining to be processed.
<b>Activity Messages pane</b>	<p>The <b>Activity Messages</b> pane reports all user and production activity and error messages during batch processing.</p> <p>When an error occurs, it is highlighted with a red circle and exclamation point and states the error message, error code, and other relevant information about the batch, step, and task. The error message is also reproduced in the <b>Error Message</b> pane directly above the <b>Activity Messages</b> pane.</p>

Element	Description
<p><b>Error Message pane</b></p>	<p>The <b>Error Message</b> pane opens when an error is encountered during production. This pane gives a short explanation of the error. This error message also displays in the <b>Activity Messages</b> pane, where more information about the error is given.</p> <p>When you click the reported error in the <b>Error Message</b> pane, the error is highlighted in the <b>Activity Messages</b> pane where you can obtain information about the error message including the error code, and information about the batch, step, and task in which the error occurred.</p> <p>If you double-click the reported error, it is removed from the <b>Error Message</b> pane, and a black circle with an X appear at the location of the error in the <b>Activity Messages</b> pane, indicating that you have reviewed the error.</p>

**11.4.1.4.1 File Menu**

**Table 11-12: Export for OpenText Content Server Window, File Menu**

Element	Description
<p><b>Sessions</b></p>	<p>Opens the <b>Content Server Logon window</b> so you can open server sessions for batch processing of tasks without embedded session logon information.</p>
<p><b>Open Batch</b></p>	<p>Opens a batch for processing in Open Batch mode.</p>
<p><b>Close Batch</b></p>	<p>Closes an open batch.</p>
<p><b>Set Up Instance</b></p>	<p>Displays the <b>Export for OpenText Content Server Setup</b> window, allowing you to specify custom settings for the Open Batch.</p>
<p><b>Export</b></p>	<p>Processes the open batch.</p>
<p><b>Exit</b></p>	<p>Exits Export for OpenText Content Server.</p>

#### 11.4.1.4.2 Run Menu






**Table 11-13: Export for OpenText Content Server Window, Run Menu**




Element	Description
All Batches	<b>All Batches</b> mode is a Wait for Task mode (a mode in which you can only process batches that are queued on the Intelligent Capture Server for the module). In <b>All Batches</b> mode, the module receives any queued tasks from any open batch as the tasks become available from the Intelligent Capture Server.
Single Batch	<b>Single Batch</b> mode is a Wait for Task mode. In <b>Single Batch</b> mode, you select a single queued batch to process.
Stop	Cancel processing of the current task and stop accepting tasks from the Intelligent Capture Server.

#### 11.4.1.4.3 Toolbar

The Export for OpenText Content Server toolbar has buttons to run or close export processes.

**Table 11-14: Export for OpenText Content Server toolbar**

Button	Button Name	Description
	Sessions	Opens the <b>Content Manager - Connect</b> window so you can open server sessions for batch processing of tasks without embedded session logon information.
	Open Batch	Opens a batch for processing in Open Batch mode.
	Close Batch	Closes an open batch.
	Set Up Instance	Displays the <b>Export for OpenText Content Server Setup</b> window where you can specify custom settings for the open batch.
	Export	Processes the open batch.

Button	Button Name	Description
	<b>Run All Batches</b>	<b>Run All Batches</b> mode is a Wait for Task mode (a mode in which you can only process batches that are queued on the Intelligent Capture Server for the module). In <b>Run All Batches</b> mode, the module receives any queued tasks from any open batch as the tasks become available from the Intelligent Capture Server.
	<b>Run Single Batch</b>	<b>Run Single Batch</b> mode is a Wait for Task mode. In <b>Run Single Batch</b> mode, you select a single queued batch to process.
	<b>Stop</b>	Cancel processing of the current task and stop accepting tasks from the Intelligent Capture Server.

#### 11.4.1.5 Export for OpenText Content Server Setup

The **Export for OpenText Content Server setup** window enables you to specify default settings for the module, or to set specific settings for a particular task. Connect to a Content Server to access some of the parameters. Begin by verifying a connection on the **Logon** tab or connect to a server from this tab. Then you can specify the export parameters to use.



**Table 11-15: Export for OpenText Content Server Setup Window**

Element	Description
<b>Logon</b> tab	Enables you to establish a connection to the servers you will export to.
<b>Export</b> tab	Enables you to set or modify item definitions and definition export options.
<b>Errors</b> tab	Enables you to set error handling and recover options.
<b>Logging</b> tab	Enables you to specify the log file parameters.
<b>Info</b> tab	Provides general information about your current session.

### 11.4.1.5.1 Logon tab

The **Logon** tab settings include:

**Table 11-16: Export for OpenText Content Server Setup Window, Logon tab**

Element	Description
Server	<p>In the <b>Server</b> field, type the name of the Content Server to which you want to connect. You can optionally specify a port number after the server name. If a port number is not specified, the module uses the default port number, 2099. Example: "ServerName:2098"</p> <p> <b>Note:</b> You can install the Livelink Secure Connect module on your machine and make SSL 3.0 secure connections to your servers. For information on how to set up and configure these connections, see <a href="#">Using Export for OpenText Content Server with Secure Connect</a>.</p>
Database	<p>In the <b>Database</b> field, type a valid database for the selected server. If a database is not specified, the default database is used.</p>
User name	<p>In the <b>User name</b> field, enter a valid user ID for the selected server.</p>
Password	<p>In the <b>Password</b> field, enter a valid password.</p>
Domain	<p>In the <b>Domain</b> field, enter a valid domain for the selected server. This field is optional.</p> <p> <b>Note:</b> Content Server domains are only supported by Content Server 9.x (minimum).</p>
Connect	<p>Click the <b>Connect</b> button to establish connection to the server. If the module is able to connect to the Content Server server, the <b>Connection Status</b> field shows the connection information.</p>

Element	Description
Automatic Logon	<p>Under <b>Automatic Logon</b>, enable or disable automatic logon options.</p> <ul style="list-style-type: none"> <li>• Select or clear the <b>Use the above user and password for tasks sent to this instance</b> check box as appropriate for your environment.</li> <li>• <b>Disconnect when</b> enables you to control when the connection to the server will be terminated.</li> </ul>
Connection Status	Indicates the current connection status.

## Related Topics

[“Logging on to the Content Server” on page 308](#)


[“Logging on to Content Server Sessions” on page 324](#)

### 11.4.1.5.2 Export tab

The **Export** tab settings include:

**Table 11-17: Export for OpenText Content Server Setup Window, Export tab**

Element	Description
Definition set	<p>Displays the list of defined definitions. A definition specifies the settings for a Content Server object. After creating a definition, you must add it to the <b>Export list</b> for it to be used.</p> <ul style="list-style-type: none"> <li>• Click <b>Create</b> to define a new definition set.</li> <li>• Select an existing definition and click <b>Edit</b> to modify the selected definition.</li> <li>• Select an existing definition and click <b>Copy</b> to make a copy of the selected definition.</li> <li>• Select an existing definition and click <b>Delete</b> to remove the selected definition.</li> </ul>

Element	Description
Export list	<p>The export list enables you to process definition settings. This list displays the definitions you want to export.</p> <ul style="list-style-type: none"> <li>• Click the <b>Add</b> button to insert a new blank row in the list. Here you can type a name for the object in the <b>Name</b> field, and select a defined item definition in the <b>Definition Name</b> field</li> <li>• Select an item in the list and click the <b>Edit</b> button to modify the selected item.</li> <li>• Select an item in the list and click the <b>Delete</b> to remove an item from the list.</li> <li>• Within the <b>Name</b> field, type a name for the item you want to export or click the <b>Browse</b> button to insert an IA Value in naming the item to be exported.</li> <li>• Within the <b>Definition Name</b> field, select the item definition by clicking the drop down arrow or click the <b>Browse</b> button to use an IA Value in specifying the item definition to be exported.</li> <li>• To define the parent-child relationships between items, select an item in the <b>Export list</b> and use the arrow buttons. The check icon (✓) indicates that the item uses a valid position in the list and parent-child relationship. The explanation point icon (!) indicates that an item's position in the list is invalid.</li> </ul> <p> <b>Note:</b> The <b>Auto-Select Definition</b> feature highlights an item's associated definition in the <b>Definition set</b> list. You can disable this feature by right-clicking an item in the <b>Export list</b> and select <b>Auto-Select Definition</b>. By default, this feature is enabled.</p>

## Related Topics

[“Configuring Item Definitions” on page 312](#)

[“Creating Export Lists” on page 311](#)

### 11.4.1.5.3 Errors tab

Use the **Errors** tab to set error handling options to specify how Export for OpenText Content Server responds when an error occurs while processing a task. The options you set here depend primarily on whether you are planning to use the module in an attended or unattended mode during production.




**Note:** Error handling options also determine what happens when the module receives a task that specifies a server for which it does not have credentials.

**Table 11-18: Export for OpenText Content Server Setup Window, Errors tab**

Element	Description
<b>Prompt for an action</b>	Selecting this option suspends processing until the operator responds. Select <b>Prompt for an action</b> when you want to prompt the operator to log into Content Manager sessions as the module receives tasks that specify different sessions.
<b>Abort entire task</b>	Aborts the current task and returns an appropriate <ExportResult> IA Value, which is evaluated by instructions in the <i>IPP Finish</i> event handler. The module may or may not continue processing other tasks depending on how you set the remaining options in this section.
<b>Skip node that produced the error and continue with remaining nodes</b>	Skips the node where error occurred and attempts to continue with the remaining nodes in the task, if any. The module returns an appropriate <ExportResult> IA Value for the node that produced the error occurred, which is evaluated by instructions in the <i>Finish</i> event handler of the IPP.
<b>Stop receiving tasks after current task</b>	Stops receiving tasks from the Intelligent Capture Server when an error occurs in the current task. This is equivalent to the operator choosing the <b>Stop</b> command.

Element	Description
<b>Set the batch priority to 0</b>	Sets the batch priority of the current task to 0 when an error occurs. This takes the batch off line, preventing further processing by any module until the administrator resets the batch priority. When this check box is cleared, the batch priority is not changed and batch processing continues as before the error occurred, except as specified in the IPP Error event handler (when you select <b>Abort entire task</b> ) or in the Finish event handler (when you select <b>Skip node that produced the error and continue with remaining nodes</b> ) in response to the <ExportResult> IA Value.
<b>Automatically retry</b>	<p>Select the check box if you want the module to automatically retry processing the task that caused an error. Specify the number of times it should retry in the field to the right. An example of an error that might not exist when the module retries the task is a file locking error. Some error conditions can cease to exist upon subsequent attempts at processing a task. For example, a temporary file or record lock in the repository server might cause an error, but might be resolved by the time the module attempts to process the task again.</p> <p>Clear the check box if you do not want the module to retry tasks that produce errors.</p>
<b>times if applicable</b>	The <b>Automatically Retry</b> option is in addition to the <RetriesLeft> option you may use in your IPP error event handler. It retries the task within the module the specified number of times, then returns it to the Intelligent Capture Server. After being returned, the error event handler and the <RetriesLeft> value may specify that the task is to be returned to the module two more times. Each time it is returned, the module may retry it multiple times. For example, if you set <b>Automatically Retry</b> to 5 and <RetriesLeft> is set to its default value of 3, the bad task is retried 15 times before giving up.
<b>Skip nodes that have already been successfully processed by this instance</b>	Prevents the module from reprocessing nodes that have already been successfully processed. When this field is cleared, the module will reprocess all nodes in the task, even those that have already been successfully processed.

 **Note:** If no error routine is defined in the IPP, a task in error in production keeps being requeued. The task is resubmitted to the module for processing and causes an error again. This cycle repeats indefinitely. Avoid this situation by providing error handling in your IPP. Or, use the default settings of **Abort Entire Task** and **Set The Batch Priority To 0** when automatically responding to errors. Select **Automatically Respond With The Following Options** if the module is run in unattended mode.

#### 11.4.1.5.4 Logging tab

The **Logging** tab settings include:

**Table 11-19: Export for OpenText Content Server Setup Window, Logging tab**

Element	Description
Log messages to a file	Log messages to a specified file. When selected activates <b>Severity to log</b> and <b>File name</b> .
Severity to log	From the list box, select: <ul style="list-style-type: none"> <li>• <b>Errors Only</b></li> <li>• <b>Errors and Information</b></li> </ul>
File name	Contains the name and location of the log file name. Use the <b>Browse</b> button to point to the file location from the <b>Select</b> window. When you log messages to a shared location and are running multiple copies of the module, you must specify a unique log file name for each module step by specifying the appropriate IA values in the file name.
Send error messages to the Intelligent Capture Server's Event Log	Logs error messages to the Intelligent Capture Server.

#### 11.4.1.5.5 Info tab

The **Info** tab settings include:

**Table 11-20: Export for OpenText Content Server Setup Window, Info tab**

Element	Description
Name	The name of the module step as declared in the <i>IPP</i> .
Departments	The names of departments defined in the batch or process.
Process/Batch name	The name of the batch or process that contains the module step.

Element	Description
Process/Batch ID	The unique ID number of the batch or process that contains the module step.
Server name	The Intelligent Capture Server name that is connected to the client machine. This is the server that owns the batch or process you are setting up.
Username	The domain and user ID specified when the connection to the Intelligent Capture Server was established during module setup.

### 11.4.1.6 Production Error

On attended machines, you can prompt for operator response when you encounter errors during production when the **Prompt for an action** check box on the **Errors** tab of the **Export for OpenText Content Server Setup** window. When an error occurs under this situation, the **Production Error** window displays with the following options:

**Table 11-21: Production Error Window**

Element	Description
How do you want to handle this error	<ul style="list-style-type: none"> <li>• <i>Retry the current node</i>: Select this option when you can correct the error and, upon retry, the task is successfully completed.</li> <li>• <i>Stop all processing on this task</i>: Select this option when the task is causing the error. You stop task processing until the error is corrected.</li> <li>• <i>Continue with other nodes in this task</i>: Select this option when the node is causing the error. The node with an error is skipped as task processing continues with the other nodes.</li> </ul>
and set the batch's priority to 0	Select this check box to stop all batch processing. Unprocessed tasks that remain in the batch are stored on the Intelligent Capture Server until an administrator resets the batch priority to non-zero. Clear this check box if you want to keep processing the remaining tasks in the batch.
then stop waiting for tasks -	Select this check box if you want to stop waiting for tasks. Until you select a processing mode, task processing stops at the client machine. Clear this check box when you want to continue processing tasks in the current processing mode.

## 11.4.2 IA Values

The topics in this section describe IA values that can be used with this application.

### 11.4.2.1 Input IA Values

Input IA Values include input file variables, such as `<Level0_InputFile1>`, and input processing variables. Input file variables serve as pointers to stage files. Input processing variables store setup data that a module uses to process tasks, including default and user-defined module settings.

**Table 11-22: Input IA Values**

IA Value	Description
Input files	
<code>&lt;InputImage&gt;</code>	<p>The task's input image on the Intelligent Capture Server. <code>&lt;InputImage&gt;</code> may be any image file processed by upstream modules. Use of an <code>&lt;InputImage&gt;</code> is optional; the module can export file values from other modules in the process. If this value is used in your <i>IPP</i>, you must also specify this as your File IA Value in the <b>File Setup</b> tab of the module's <b>Definitions</b> window to complete its export. If this value is used in the IPP, it is a trigger. When all trigger values are non-zero, the module will process the current task.</p> <ul style="list-style-type: none"> <li>• <i>Attributes:</i> File, Input</li> <li>• <i>Level:</i> 0</li> </ul>
<code>&lt;Level&lt;n&gt;_InputFile1&gt;</code>	<p>The first of as many as two input files from the task. The file that corresponds with <code>&lt;Level&lt;n&gt;_InputFile1&gt;</code> can be a file of any type whose data you may want to export. The module will not modify this file in any way. If this value is used in your IPP, you must also specify this as your File IA Value in the <b>File Setup</b> tab of the module's <b>Definitions</b> window to complete its export. If this value is used in the IPP, it is a trigger. When all trigger values are non-zero, the module will process the current task.</p> <ul style="list-style-type: none"> <li>• <i>Attributes:</i> File, Input</li> <li>• <i>Level&lt;n&gt;:</i> <code>&lt;n&gt; = 0-7</code></li> </ul>


IA Value	Description
<Level<n>_InputFile2>	<p>The second of as many as two input files from the task. The file that corresponds with &lt;Level&lt;n&gt;_InputFile2&gt; can be a file of any type whose data you may want to export. The module will not modify this file in any way. If this value is used in your IPP, you must also specify this as your File IA Value in the <b>File Setup</b> tab of the module's <b>Definitions</b> window to complete its export. If this value is used in the IPP, it is a trigger. When all trigger values are non-zero, the module will process the current task.</p> <ul style="list-style-type: none"> <li>• Attributes: File, Input</li> <li>• Level&lt;n&gt;: &lt;n&gt; = 0-7</li> </ul>
Input values	
<Ready>	<p>A secondary trigger value that can be used when no file values are specified or when another trigger is needed to adequately control the beginning of processing. If this value is used in the IPP, it is a trigger. When all trigger values are non-zero, the module will process the current task.</p> <ul style="list-style-type: none"> <li>• Attributes: Integer, Input, Trigger</li> <li>• Level: T</li> </ul>
<Definition<n>>	<p>The definition name used by item &lt;n&gt; (where &lt;n&gt; = 1-10) in the task's export list.</p> <ul style="list-style-type: none"> <li>• Attributes: String, Input, NoTrigger</li> <li>• Level: 0</li> </ul>
<Level0_Processed>	<p>Set this value to False (0) to re-export a level 0 node. You can also set this value to True (1) to exclude a level 0 node from being exported.</p> <ul style="list-style-type: none"> <li>• Attributes: Long, Input, NoTrigger</li> <li>• Level: 0</li> </ul>

### 11.4.2.2 Output IA Values

Output IA Values include the output processing variables, which store data generated by the module during processing.

**Table 11-23: Output IA Values**

IA Value	Description
Output values	
<ObjectType<n>>	<p>The Content Server defined object type of item &lt;n&gt; (where &lt;n&gt; = 1-10) in the export list. This value will always be set to 0 (object type). This value combined with the &lt;ObjectSubType&gt;&lt;n&gt;, corresponds to the object type specified for the module on the <b>Item</b> tab.</p> <ul style="list-style-type: none"> <li>• <i>Attributes:</i> Long, Output</li> <li>• <i>Level:</i> 0</li> </ul>
<ObjectSubType<n>>	<p>The Content Server defined object sub type of item &lt;n&gt; (where &lt;n&gt; = 1-10) in the export list. The variable can be set to any of these values:</p> <ul style="list-style-type: none"> <li>• 0: Folder</li> <li>• 128: Workflow Map</li> <li>• 136: Compound Document</li> <li>• 144: Document</li> </ul> <p>This value combined with the &lt;ObjectType&gt;&lt;n&gt;, corresponds to the object type specified for the module on the <b>Item</b> tab.</p> <ul style="list-style-type: none"> <li>• <i>Attributes:</i> Long, Output</li> <li>• <i>Level:</i> 0</li> </ul>
<WorkID<n>>	<p>The Content Server <b>Work ID</b> of item &lt;n&gt; (where &lt;n&gt; = 1-10) in the export list. This value is only populated if the object is a Workflow.</p> <ul style="list-style-type: none"> <li>• <i>Attributes:</i> Long, Output</li> <li>• <i>Level:</i> 0</li> </ul>

IA Value	Description
<VolumeID<n>>	<p>The Content Server <b>Volume ID</b> for item n (where &lt;n&gt; = 1-10) in the export list. this value corresponds to the <b>Volume ID</b> specified in the Item reference for the module on the <b>Location</b> tab.</p> <ul style="list-style-type: none"> <li>• Attributes: Long, Output</li> <li>• Level: 0</li> </ul>
<ObjectID<n>>	<p>The Content Server <b>Object ID</b> of item &lt;n&gt; (where &lt;n&gt; = 1-10) in the export list. This value corresponds to the <b>Object ID</b> specified in the Item reference for the module on the <b>Location</b> tab.</p> <ul style="list-style-type: none"> <li>• Attributes: Long, Output</li> <li>• Level: 0</li> </ul>
<Status<n>>	<p>The status of item &lt;n&gt; (where &lt;n&gt; = 1-10) in the export list, which can be any of these values:</p> <ul style="list-style-type: none"> <li>• 0: No action taken.</li> <li>• 1: Created new item.</li> <li>• 2: Modified existing item.</li> <li>• Attributes: String, Output</li> <li>• Level: 0</li> </ul> <p> <b>Note:</b> Even if a page's &lt;Status&lt;n&gt;&gt; IA Value is 0 (not exported), the &lt;ObjectID&lt;n&gt;&gt; and &lt;VolumeID&lt;n&gt;&gt; IA Values are populated. The &lt;ObjectID&lt;n&gt;&gt; and &lt;VolumeID&lt;n&gt;&gt; IA Values are populated with the &lt;ObjectID&gt; and &lt;VolumeID&gt; of the most recently exported or modified <b>Export list</b> item. For example, an export list item's name is "MultipageFile@1" and its definition is setup to create a multipage image. The &lt;Status&gt;&lt;n&gt; value for the first page in a Level 1 will be 1 and the Status &lt;n&gt; for the remaining pages in the Level 1 will be 0. All pages in the Level 1 will reference the same &lt;Content Server ObjectID&gt; and &lt;VolumeID&gt; since they are all part of the multipage file.</p>
Output status and error variables	

IA Value	Description
<ExportResult>	<p>If all documents contained by the task were exported successfully, this variable is set to zero. Otherwise, this variable contains a negative number indicating the error. You can check this variable in a <code>Finish</code> event handler after export to determine whether any documents need to be exported again. To determine which documents need to be reexported, check the &lt;Level0_ErrorNumber&gt; and &lt;Level0_ErrorText&gt; IA Values for the node where the error occurred.</p> <ul style="list-style-type: none"> <li>• Attributes: Long, Output</li> <li>• Level: T</li> </ul>
<ErrorNumber>	<p>The error number of an error that occurred during pre- or postprocessing of the task.</p> <ul style="list-style-type: none"> <li>• Attributes: Long, Output</li> <li>• Level: T</li> </ul>
<ErrorText>	<p>The error text of an error that occurred during pre- or postprocessing of the task.</p> <ul style="list-style-type: none"> <li>• Attributes: String, Output</li> <li>• Level: T</li> </ul>
<Level0_ErrorNumber>	<p>The error number of the last error that occurred while processing the node.</p> <ul style="list-style-type: none"> <li>• Attributes: Long, Output</li> <li>• Level: 0</li> </ul>
<Level0_ErrorText>	<p>The error text of the last error that occurred while processing the node.</p> <ul style="list-style-type: none"> <li>• Attributes: String, Output</li> <li>• Level: 0</li> </ul>
<Level0_Processed>	<p>A value that is set to 1 after each level 0 node in the task has been processed.</p> <ul style="list-style-type: none"> <li>• Attributes: Long, Output</li> <li>• Level: 0</li> </ul>
Output statistical variables	
<StartTime>	<p>The time at which processing on the task commenced.</p> <ul style="list-style-type: none"> <li>• Attributes: String, Output</li> <li>• Level: T</li> </ul>

IA Value	Description
<StartDate>	<p>The date on which processing on the task commenced.</p> <ul style="list-style-type: none"> <li>• Attributes: String, Output</li> <li>• Level: T</li> </ul>
<EndTime>	<p>The time at which processing on the task completed.</p> <ul style="list-style-type: none"> <li>• Attributes: String, Output</li> <li>• Level: T</li> </ul>
<EndDate>	<p>The date on which processing on the task completed.</p> <ul style="list-style-type: none"> <li>• Attributes: String, Output</li> <li>• Level: T</li> </ul>
<TotalTime>	<p>The total time to process the task.</p> <ul style="list-style-type: none"> <li>• Attributes: Long, Output</li> <li>• Level: T</li> </ul>
<Operator>	<p>The user name of the operator who is logged into the module.</p> <ul style="list-style-type: none"> <li>• Attributes: String, Output</li> <li>• Level: T</li> </ul>
<Level0_StartTime>	<p>The time at which processing on the node commenced.</p> <ul style="list-style-type: none"> <li>• Attributes: String, Output</li> <li>• Level: 0</li> </ul>
<Level0_StartDate>	<p>The date on which processing on the node commenced.</p> <ul style="list-style-type: none"> <li>• Attributes: String, Output</li> <li>• Level: 0</li> </ul>
<Level0_EndTime>	<p>The time at which processing on the node completed.</p> <ul style="list-style-type: none"> <li>• Attributes: String, Output</li> <li>• Level: 0</li> </ul>
<Level0_EndDate>	<p>The date on which processing on the node completed.</p> <ul style="list-style-type: none"> <li>• Attributes: String, Output</li> <li>• Level: 0</li> </ul>
<Level0_TotalTime>	<p>The total time to process the node.</p> <ul style="list-style-type: none"> <li>• Attributes: Long, Output</li> <li>• Level: 0</li> </ul>



# Glossary

**ACL**

Access Control List

**ALF**

Application Lifecycle Framework

**ASCII**

American Standard Code for Information Interchange

**BES**

Batch Entry Services

**BIN**

Binary file extension

**BMP**

Bitmap file extension

**CCITT**

Comité consultatif international téléphonique et télégraphique (French for International Telegraph and Telephone Consultative Committee, became the ITU Telecommunication Standardization Sector, ITU-T, in 1992)

**CGM**

Computer Graphics Metafile

**CS**

Content Server

**CSS**

Content Storage System

**DLL**

Dynamic Link Library

**DOT**

Microsoft Office Word document file extension

**DQL**

Database Query Language

**FAX**

Fax file extension

**G4**

*CCITT* Group 4

**gif**

Graphic Interchange Format

**GUID**

Global Unique Identifier

**HTML-WK**

*HTML* e\_Suite spreadsheet application *MIME* type.

**HTML-WP**

*HTML* e\_Suite wordprocessor application *MIME* type.

**HTML**

HyperText Markup Language

**HTTP**

Hypertext Transfer Protocol

**HTTPS**

Hypertext Transfer Protocol Secure

**IPP**

Integrated ProcessFlow Project

**JBIG**

Joint Bi-level Image Experts Group

**JPEG**

Joint Photographic Experts Group

**JS**

JavaScript file extension

**LWSO**

Lightweight System Objects

**LZW**

Lempel-Ziv-Welch compression algorithm

**MDF**

Module Definition File

**MIME**

Multipurpose Internet Mail Extension

**MOV**

Quicktime media file extension

**MWP**

Microsoft WordPro template file extension

**OCR**

Optical Character Recognition

**OTF**

Open Type Font format

**PCX**

PC Paintbrush bitmap format file extension

**PDF**

Portable Document Format

**PID**

Persistent Identifier

**PPT**

Microsoft Office PowerPoint file extension

**PRZ**

Lotus Freelance Graphics file extension

**PS**

PostScript file extension

**REO**

Internal format for archive files

**RPT**

Report file extension

**RTF**

Rich Text Format

**SCR**

Script Engine module

**SLD**

SAP System Landscape Directory

**SSL**

Secure Sockets Layer

**STL**

stereolithography format

**TCP/IP**

Transmission Control Protocol/Internet Protocol

**TEXT**

text file format

**TIFF**

Tagged Image File Format

**UNC**

Universal Naming Convention

**VBS**

Microsoft Visual Basic Script

**VSD**

Visio document file extension