

Administration and User Guide

Version 2.0

IRISConnect 2

Build 2.0

3/8/2012
I.R.I.S. Products & Technologies
Dgi
Pko



Table of Contents

Legal Notices	5
Introducing IRISConnect	7
What is IRISConnect	7
Using IRISConnect	8
Target audience of this manual	10
How to use this manual	11
Installation and Setup	13
System Requirements.....	13
Installation information.....	14
Installing IRISConnect.....	15
Registering IRISConnect	15
Uninstalling IRISConnect	17
Product Support.....	17
Part 1: Common Configuration of IRISConnect	18
Introduction	18
Overview of the IRISConnect configuration interface	19
Step 1: Establish the connection	21
Step 2: Define Rule Sets	22
Step 3: Define Rules	25

Index Mapping	28
Part 2: IRISConnect combined with I.R.I.S. Solutions as input source	30
Introduction	30
IRISConnect combined with IRIS Powerscan	30
Preliminary note	32
Important note about the IRIS Powerscan 9.6 update	33
Using the IRIS Powerscan Configuration Wizards	34
Using the Configuration Wizards combined with a Manual Configuration	44
Doing a fully manual Configuration	46
IRISConnect combined with IRIS Document Server + IRIS Powerscan	49
Preliminary note	49
Description of the IRIS Powerscan - IRIS Document Server - IRISConnect process	50
Preliminary requirements	50
Creating a customized ids.bat file	51
Set up a Watched Folder in IRIS Document Server	52
Configuring the IRIS Document Server connector from within IRIS Powerscan	60
IRISConnect combined with IRIS Document Server	62
Preliminary note	62
Configuring IRIS Document Server with IRISConnect:	63
IRISConnect combined with IRIS Capture Pro	63

Preliminary note.....	64
Update to version IRISCapture Pro 8.51	64
Configuring the IRISCapture to IRISConnect connector	64
Setting up the connector	65
Enabling the Post-Export in IRISCapture.....	71
IRISConnect combined with IRISXtract for Documents	72
Preliminary notes	73
System Configuration	73
Licensing.....	73
Configuring connectors in IRISXtract:.....	78
Part 3: Particularities about the Connectors.....	83
Therefore	83
Therefore features	83
Export to Therefore via the IRISConnect interface	85
SharePoint	86
SharePoint features	86
Export to SharePoint via the IRIS Powerscan Configuration Wizard	86
Export to SharePoint via the IRISConnect interface	88
IRISNext.....	91
IRISNext features	91
Export to IRISNext via the IRIS Powerscan Configuration Wizard ...	92
Export to IRISNext via the IRISConnect interface	93

FileNet 98

 FileNet features 98

 Export to FileNet via the IRIS Powerscan Configuration Wizard 98

 Export to FileNet via the IRIS Connect interface 99

CMIS 104

Cloud Systems 105

 Export to the Cloud via the IRIS Powerscan Configuration Wizard 105

 Export to the Cloud via the IRIS Connect interface 106

LEGAL NOTICES

IRISConnect-dgi-pko-06032012-07

Copyrights

Copyrights ©2011-2012 I.R.I.S. All Rights Reserved.

I.R.I.S. owns the copyrights to the IRISConnect software and to this publication.

The information contained in this document is the property of I.R.I.S. Its content is subject to change without notice and does not represent a commitment on the part of I.R.I.S. The software described in this document is furnished under a license agreement which states the terms for use of this product. The software may be used or copied only in accordance with the terms of that agreement. No part of this publication may be reproduced, transmitted, stored in a retrieval system, or translated into another language without the prior written consent of I.R.I.S.

Trademarks

The I.R.I.S. logo, IRISConnect, IRIS Powerscan, IRIS Document Server, IRIS Capture Pro, IRIS Xtract for Documents and IRIS Next are trademarks of I.R.I.S.

OCR ("Optical Character Recognition"), Linguistic technology, ICR ("Intelligent Character Recognition") technology, MICR ("Magnetic Ink Character Recognition") technology, BCR ("Bar Code Reading") technology, and iHQC ("intelligent High Quality Compression) technology by I.R.I.S.

All other products mentioned in this publication are trademarks or registered trademarks of their respective owners.

INTRODUCING IRISCONNECT

WHAT IS IRISCONNECT

IRISConnect is a singular and stand-alone framework to connect any I.R.I.S. solution to a wide range of third-party ECM and CRM systems, both in a private intranet environment and in the Cloud.

IRISConnect allows you to export the documents you process with your I.R.I.S. solutions – including the indexes you assign to them – to the destination of your choice.

IRISConnect can also be developed to work with third-party document processing solutions.

IRISConnect currently connects to the following systems, via **specific connectors** and **generic connectors**.

Specific Connectors		Generic Connectors
ECM Systems	Cloud Systems	
Therefore	Therefore Online	ODBC
SharePoint	SharePoint Online	Toolbox (Examples: Microsoft Dynamics, Sage, SAP)
FileNet	EverNote	CMIS (Examples: Documentum, Alfresco, Nuxeo, Sensenet)
IRISNext	Dropbox	
	Box	

	GoogleDocs	
--	------------	--

Note that all connectors are built around the same backbone. In other words, if you know how to configure 1 connector, you know how to configure them all.

Also, when you acquire one connector – IRISConnect for Therefore for instance – you will be able to use it combined with every supported I.R.I.S. solution.

The Cloud systems Box, Dropbox, Evernote and GoogleDocs are bundled in one license package called **IRISConnect for Cloud**.

Note that the generic connectors allow you to do a more advanced configuration, for instance to export documents to an ERP system in the case of IRISConnect Toolbox. Dedicated Technical Notes are available for **IRISConnect Toolbox** and **IRISConnect for ODBC**.

USING IRISCONNECT

IRISConnect can be used in different ways:

- IRISConnect combined with I.R.I.S. solutions as input source
- IRISConnect combined with third-party applications as input source
- IRISConnect as stand-alone application*

IRISConnect combined with I.R.I.S. solutions as input source

The following I.R.I.S. scanning and document management solutions offer **an integrated connection** with IRISConnect:

- IRIS Powerscan 9.6 and higher
- IRIS Document Server 9.5.0.2 and higher
- IRIS Capture Pro 8.51 and higher
- IRIS Xtract for Documents 3.2 and higher
- Readiris 14 and higher
- IRIS Next 7.4 and higher

The level of integration currently varies from one I.R.I.S. solution to another. IRIS Powerscan for instance offers convenient Configuration Wizards, while in IRIS Document Server there are a few more manual configurations to be done.

The procedures on how to configure IRISConnect combined with these I.R.I.S. solutions – except Readiris* – are explained in this manual.

*Readiris isn't included in this manual since the connectors are an integral part of the Readiris software and no IRISConnect license is required to use the connectors in Readiris.

IRISConnect combined with third-party applications as input source

IRISConnect can be integrated in any third-party application.

Refer to the separate **Developer Guide** to learn how to do so.

IRISConnect as stand-alone application*

Note that IRISConnect can also be used as stand-alone application in specific projects and by advanced users.

Refer to the separate Technical Note **IRISConnect as Stand-alone** on the IRISConnect cd-rom for more information.

Note, however, that no Technical Support is offered when using IRISConnect as stand-alone.

TARGET AUDIENCE OF THIS MANUAL

This manual is above all intended for Administrators who want to connect the I.R.I.S. solutions IRIS Powerscan, IRIS Document Server, IRIS Capture Pro and IRIS Xtract for Documents to the ECM and CRM systems supported by IRISConnect.

Supported versions of I.R.I.S. solutions as input source


The instructions in this manual apply to the following I.R.I.S. product versions:

- IRIS Powerscan 9.6
- IRIS Document Server 9.5.0.2
- IRIS Capture Pro for Invoices 8.51
- IRIS Xtract for Document 3.2

Containing:

- IRIS Xtract Solution Designer 3.2.0 Hotfix 1
- IRIS Xtract Solution Designer Export Plugin 1.0.10
- IRIS Xtract Solution Package Accounts Payable 5.0.7.0 for Xtract 3.2.0

- Xtract Project Solution Package Accounts Payable 5.5.x
- IRISNext 7.4

 **Important note:** make sure you have the correct product version.

A good understanding of the above-mentioned I.R.I.S. products and ECM systems is required. For detailed information about these I.R.I.S. products, refer to their respective User Guides.

To update any of the I.R.I.S. products, contact **I.R.I.S. Technical Support** at activation@iriscorporate.com.

HOW TO USE THIS MANUAL

This manual consists of 3 big parts:

Part 1: Common Configuration of IRISConnect

In the introduction we mentioned that all connectors are built around the same backbone. As a result, a large part of the configuration is common to all connectors.

Information about the **common configuration** can be found in **Part 1**.

Part 2: IRISConnect combined with I.R.I.S. solutions as input source

In **Part 2** we explain how to configure IRISConnect combined with the supported I.R.I.S. solutions.

Although the common configuration always stays the same, the way to access IRISConnect from within the I.R.I.S. solutions differs from one solution to another. For instance in IRIS Powerscan you can either use the Configuration Wizards, do a manual

configuration, or even a combination of both, while in the other solutions you can only do a manual configuration.

So, the differences between the I.R.I.S. solutions are discussed in Part 2. When necessary, we refer to the common configuration of IRISConnect in Part 1.

Part 3: Particularities about the Connectors

In Part 3 we try to give an overview of the particularities of each connector.

Since each ECM system has certain rules – such as a document hierarchy for instance – that must be respected, the configuration rules slightly differ from one connector to another.

Also, different ECM systems use a different terminology. Some system categorize documents into folders > documents > objects, while other talk of cabinets > files > etc. Hence, different option names will be displayed in the IRISConnect configuration windows.

The most important differences can be found in **Part 3**.

<p>Important note: to configure IRISConnect for Toolbox and IRISConnect for ODBC, refer to the separate Technical Notes on the IRISConnect cd-rom.</p>

INSTALLATION AND SETUP

SYSTEM REQUIREMENTS

- A Windows XP, Windows Server 2003 (32 and 64 bit), Windows Vista (32 and 64 bit), Windows Server 2008 (32 and 64 bit) or Windows 7 (32 and 64 bit) Operating System.

Note: when using Windows XP, you need to install .Net Framework 3 or higher.

- In terms of processing capacity IRISConnect in itself does not increase your system requirements.

If your system is powerful enough to run IRISDocument Server, IRISCapture, IRIS Powerscan or IRISXtract, you will be able to install and use IRISConnect.

Note: if you want to use the FileNet connector, **Microsoft Web Services Enhancements 3.0** must be installed. To install it, run **wse30.msi** in the **Tools** folder of the IRISConnect cd-rom.

- 20 MB of disk space.

INSTALLATION INFORMATION

Before you begin:

Before you install IRISConnect, make sure you have the correct version of your IRIS product installed:

- IRIS Powerscan 9.6
- IRIS Document Server 9.5.0.2
- IRIS Capture Pro for Invoices 8.51
- IRIS Xtract for Document 3.2.0

Containing:

- IRIS Xtract Solution Designer 3.2.0 Hotfix 1
- IRIS Xtract Solution Designer Export Plugin 1.0.10
- IRIS Xtract Solution Package Accounts Payable 5.0.7.0 for Xtract 3.2.0
- Xtract Project Solution Package Accounts Payable 5.5.x
- IRIS Next 7.4

Earlier versions of these I.R.I.S. products are not compatible with IRISConnect.

Important note:

If you want to use both IRIS Powerscan and IRIS Document Server in combination with IRISConnect, make sure to install IRIS Powerscan first, and then IRIS Document Server.

INSTALLING IRISCONNECT

- Insert the **IRISConnect** cd-rom in your computer and run the **Setup.exe** file from the cd.
- Follow the on-screen instructions.

Once you've installed IRISConnect you need to register your connectors. The registration section does not apply to IRISXtract. A different procedure is required in that case. See the **Licensing** topic on IRISXtract for detailed information.

REGISTERING IRISCONNECT

(**Attention:** this section does not apply to IRISXtract for Documents)

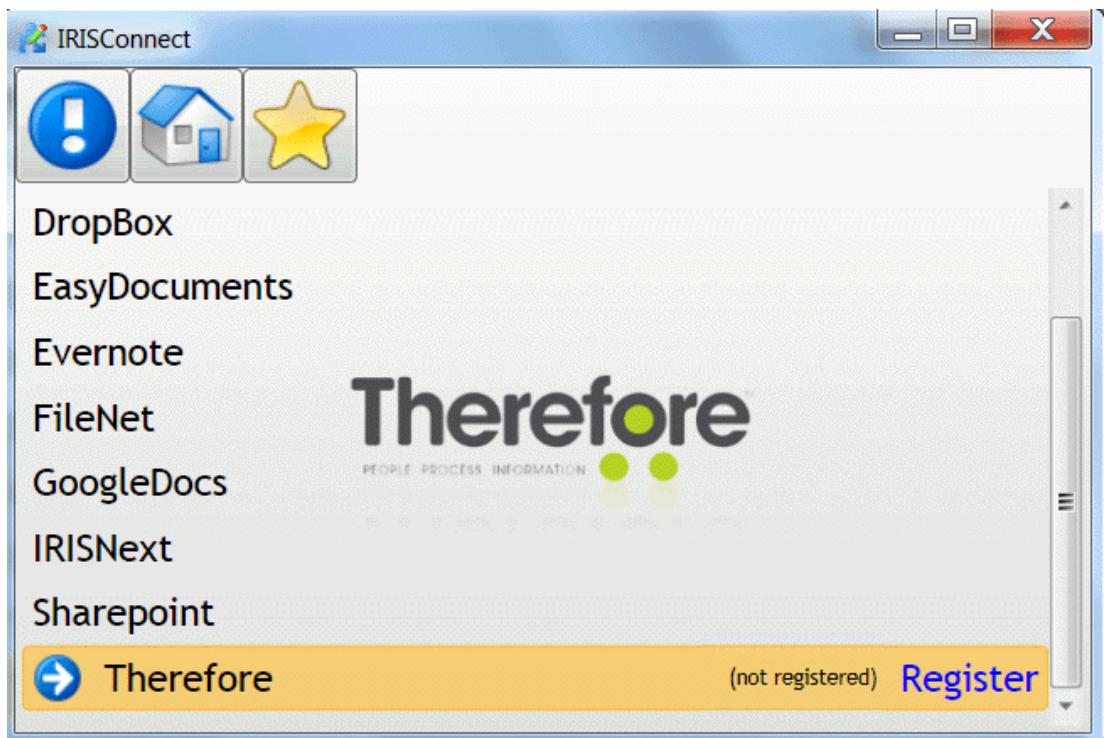
Before you can use an IRISConnect connector, you must first register it.

Note that registering offers such advantages as free Technical Support, product updates, and so on.

To register your connectors:

- From the Windows **Start** menu, run **IRISConnect**.
- Select the connector you want to register, then click **Register**.

Note that each connector must be registered separately.



- Copy the hardware key and send it to **activation@iriscorporate.com**.

You'll receive the software key in return.

- Then enter the software key to register the connector.



UNINSTALLING IRISCONNECT

To uninstall IRISConnect:

- Go to the Windows **Control Panel > Programs and Features**.
- Select **IRISConnect** from the list and click **Uninstall**.

This will uninstall all the connectors you have installed.

To uninstall a connector separately:

- Open the file **win.ini** from C:\Windows in Notepad.
- Delete the software key for the specific connector.

It will be uninstalled from your application.

PRODUCT SUPPORT

In case you are having trouble with IRISConnect, contact I.R.I.S. Technical Support at **<https://supportcenter.iriscorporate.com>**.

In case of update issues or questions, send an e-mail to **activation@iriscorporate.com**.

PART 1: COMMON CONFIGURATION OF IRISCONNECT

INTRODUCTION

In this part we discuss the basic, common configuration of IRISConnect, which is the same for each connector and in each I.R.I.S. solution.

A basic, common configuration of IRISConnect consists of the following steps:

- **Step 1:** establish a **Connection** to the ECM or Cloud system of your choice.

This step speaks for itself. A connection is required to export your documents.

- **Step 2:** define a **Rule Set**.

Rule sets define which **types of documents** are exported to the ECM system of your choice.

In IRIS Powerscan, for instance, you have Batches and Documents as document type. In IRIS Capture Pro for Invoices, you typically have Invoices.

Rule sets can also be used to group multiple rules which you want to apply to a certain document type.

Note: if you don't want to make any distinction between the document types, you don't need to define rule sets. In this case, just create a default rule set and leave it empty. Next you can proceed with **Step 3: define rules**.

- **Step 3: define Rules**

Rules define the exact location of the exported documents on the ECM system. They also define as what kind of object your documents will be exported, e.g. as document, folder, invoice, brochure, and so on.

By means of rules you can also do **index mapping**. This means you can indicate which indexes from your I.R.I.S. solutions should correspond to which indexes in your ECM system. This way, when process indexed documents, your exported documents also contain the same indexes in your ECM system.

Each of these three steps is described in detail in the following sections.

OVERVIEW OF THE IRISCONNECT CONFIGURATION INTERFACE

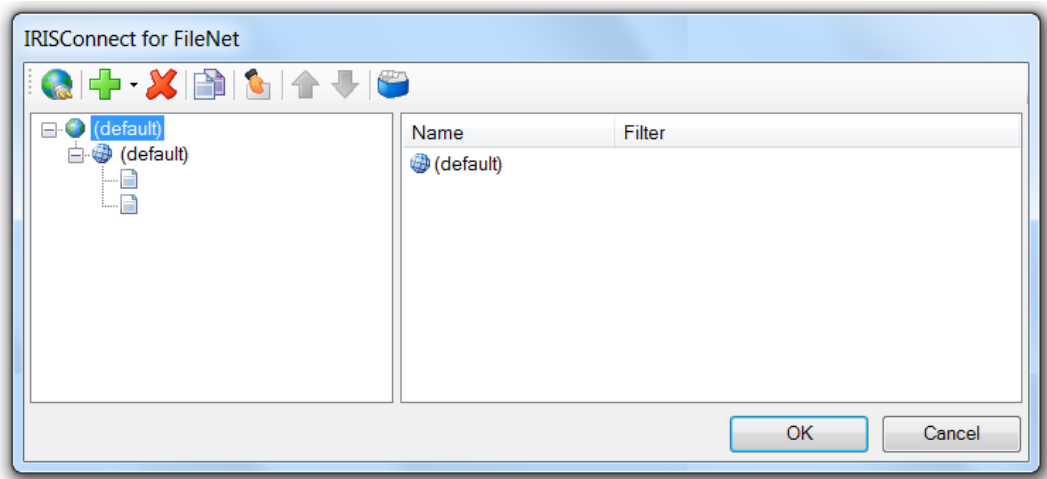
Attention: when using IRISConnect combined with I.R.I.S. solutions as input source, the IRISConnect interface must be accessed from within those I.R.I.S. solutions. Except when using IRISConnect combined with IRISDocument Server. In that case you need to access the IRISConnect interface from the Windows **Programs** list.








Note: if you are using IRISConnect as stand-alone, you also access it via the Windows **Programs** list.

The way to access the IRISConnect interface varies from one I.R.I.S. solution to another. Refer to **Part 2** of this documentation for information on how to access IRISConnect from within:

- **IRIS Powerscan**
- **IRIS Capture Pro**
- **IRIS Xtract for Documents**

The IRISConnect interface looks like as follows:

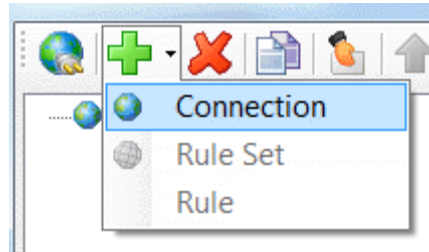


 	Add and set up a connection
	Delete an object
	Copy an object
	Check the Properties of an object
	Move an object
	Index object

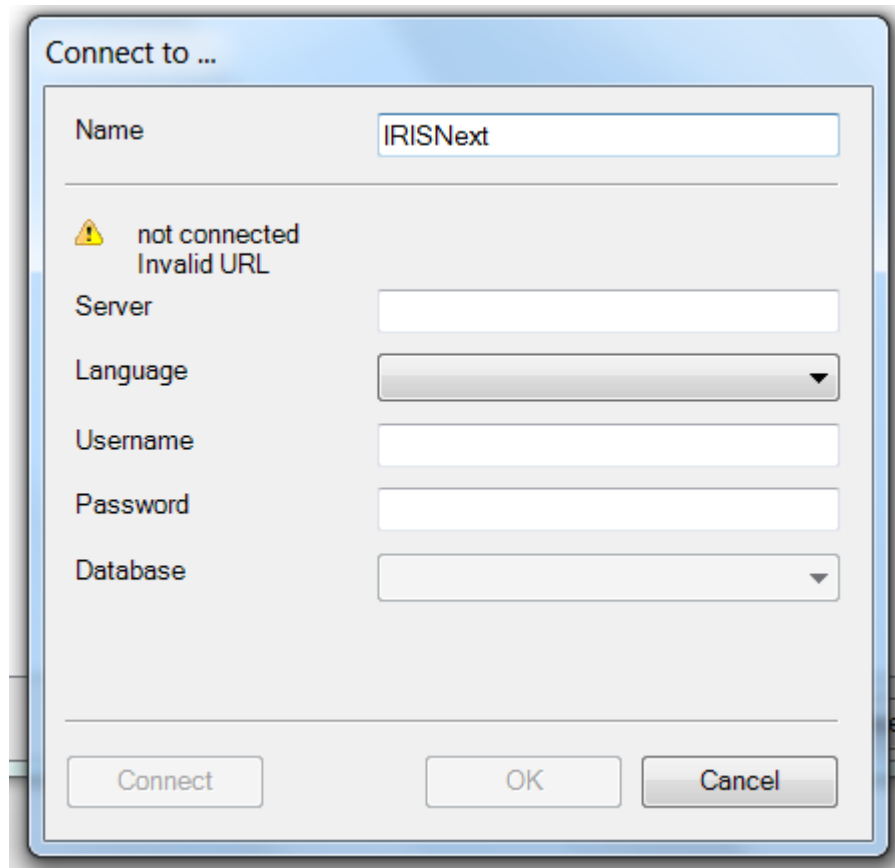
Note: “objects” refers to connections, rule sets and rules here.

STEP 1: ESTABLISH THE CONNECTION

1. Click the down arrow right of the green cross and click **Connection**.



2. **Name** the connection and enter the **Server** to connect to.

A screenshot of a dialog box titled "Connect to ...". The dialog box has a light blue header and a white body. It contains the following fields and controls:

- Name:** A text input field containing the text "IRISNext".
- Server:** A text input field.
- Language:** A dropdown menu.
- Username:** A text input field.
- Password:** A text input field.
- Database:** A dropdown menu.

Below the fields, there is a warning icon (a yellow triangle with an exclamation mark) and the text "not connected Invalid URL". At the bottom of the dialog box, there are three buttons: "Connect", "OK", and "Cancel".

3. **Provide** any additional **credentials**.

Depending on the ECM system you want to connect to, you may need to enter a Username, Password or other credentials.

4. Then click the **Connect** button.

The **Not connected** warning disappears if the connection is set up correctly. Should that not be the case, check the server.


In some ECM systems you first need to connect to the server, then select an underlying database and click **Connect** again.

Note: see **Part 3: Particularities about the Connectors** to check for specific information about the connection.

5. Now proceed with **Step 2: Define Rule Sets**

Adding additional connections

Note that it is also possible to use multiple connections in 1 configuration. This way you can for instance apply different rule sets and rules to export your documents to the same server, or set up different connections to export to multiple servers.

To add a connection repeat Step 1, or select a connection and click **Copy** .

STEP 2: DEFINE RULE SETS

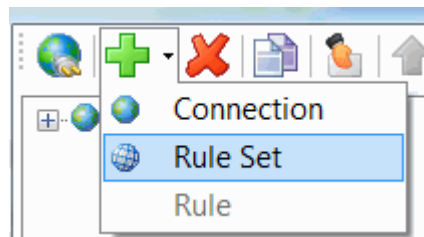
Rule sets define which **types of documents** are exported to the ECM system of your choice.

In IRIS Powerscan, for instance, you have Batches and Documents as document type. In IRIS Capture Pro for Invoices, you typically have Invoices.

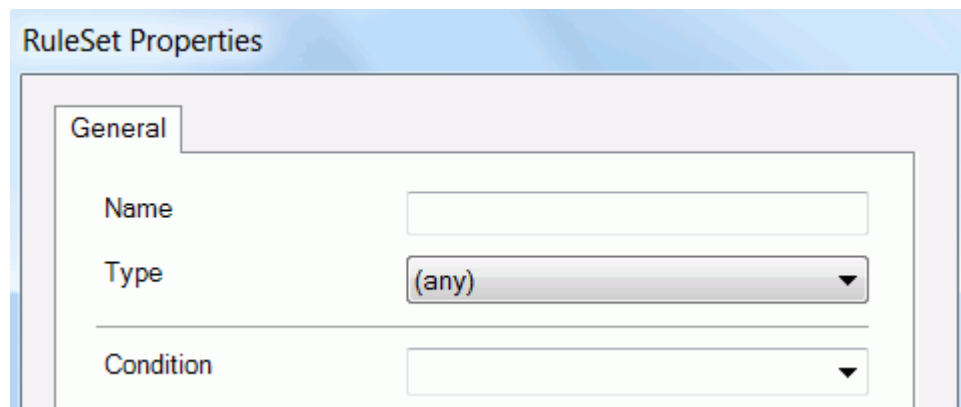
Note: even if you don't want to make a distinction between document types, it is still necessary to create a default rule set. Otherwise you will not be able to proceed to **Step 3: Adding Rules**.

To create a Rule Set:

- Select the connection you created.
- Then click the down arrow right of the green cross and click **Rule Set**.



- Name the **Rule Set**.

A screenshot of the 'RuleSet Properties' dialog box. The 'General' tab is selected. There are three main fields: 'Name' with an empty text box, 'Type' with a dropdown menu showing '(any)', and 'Condition' with a dropdown menu showing a downward arrow.

- In the **Type** list, select the types of documents to export.


The types that are available in this list are the ones that were defined in the I.R.I.S. solution you are working with. For

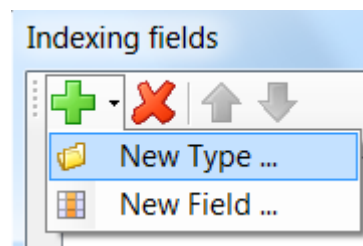
instance, in case of IRISXtract you find **Invoices** and **Custom** as document type.

In case you don't want to make a distinction based on the document type, select (**any**). This way, all documents will be exported.

Note that you can also create types manually.

Creating document types manually in the interface

- Click the indexing icon .
- Click the down arrow right of the green cross and click **New Type**.



- Name the type, then add the index fields you want your documents to have.
- When you are done, return to the Rule Set configuration.
- If necessary, you can apply a **Condition** to specify more complex restrictions for your document types.


Note that the conditions must be written in **C#**.

Example: Field["document.scan_station"].equals("my scan station"). In this example, only documents coming from a specific scan station will be processed.

Tip: to apply a negative condition, put an exclamation mark in front of the expression.

- When you are done, click **OK** and continue with **Step 3: Create Rules**.

Adding additional Rule Sets

Note that it is possible to have multiple rule sets within a single connection. To add a connection repeat Step 2, or select a rule set and click **Copy** .

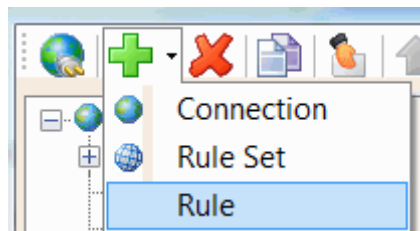
STEP 3: DEFINE RULES

Once you have created a Rule Set, you can create **Rules**.

Rules define how an input object will be transformed into one or more output objects. They also define the exact location of the output objects.

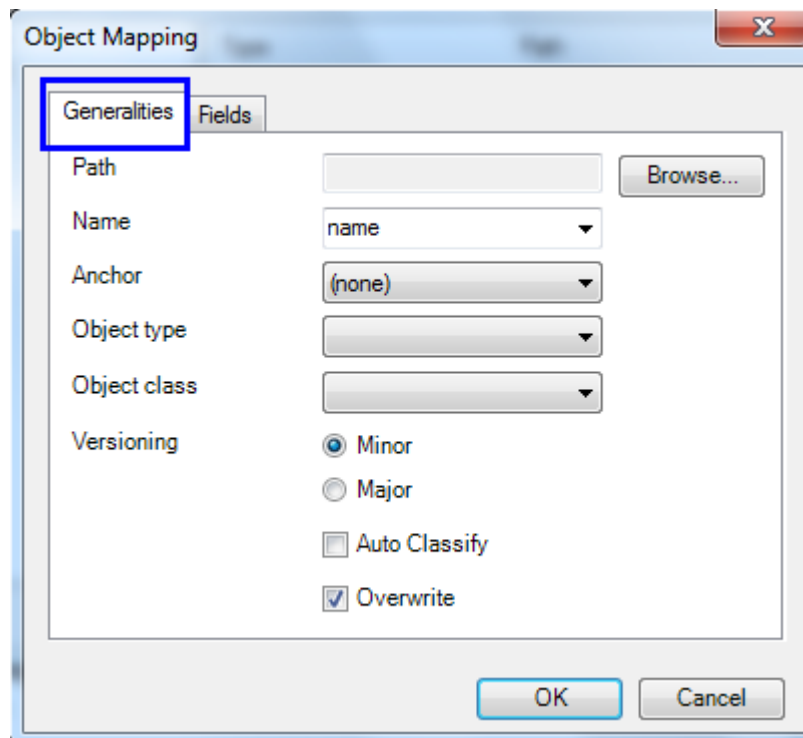
To create rules:

- Click a **Rule Set** you created.
- Then click the down arrow right of the green cross and click **Rule**.



- The **Object Mapping** window opens on the **Generalities** tab.

This window differs slightly from one connector to another.

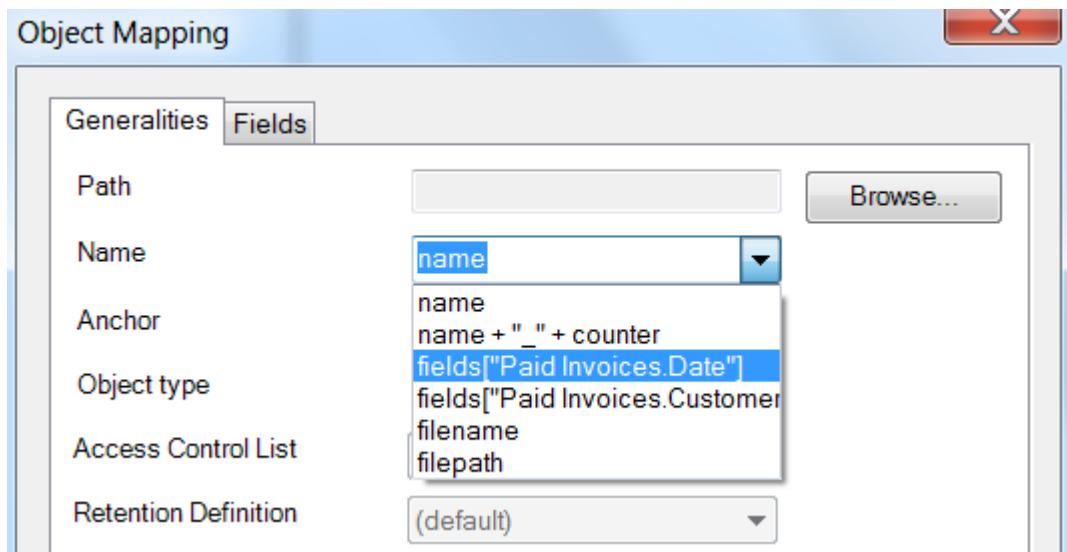


- Click **Browse** to choose the **Path** where you want to export documents.

If you leave the path empty your documents are stored in the root of your ECM system.

- Indicate a **Name** for your documents.

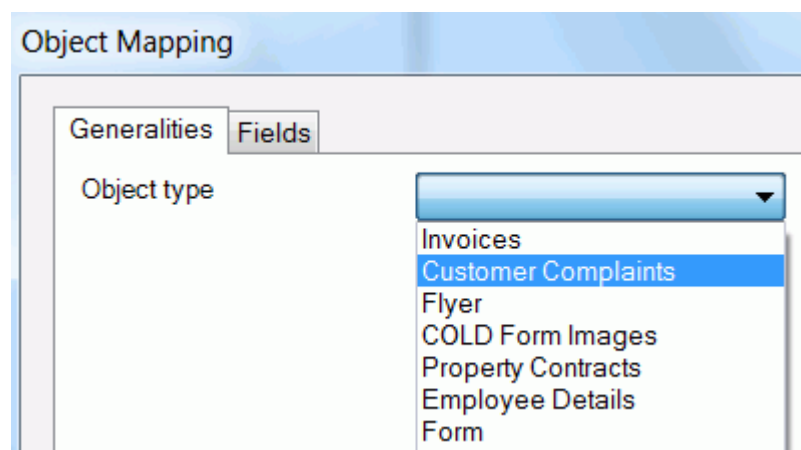
Note that the naming options differ from one connector to another.



Also note that each index field you create on the **Fields** tab can be added as name as well. **Example:** in the image above, we created **Paid Invoices** as document type and we created manually the fields **Date** and **Customer**. See the section **Index Mapping** for more information on how to create index fields.

- Select as which **Object type** you want to export your documents.

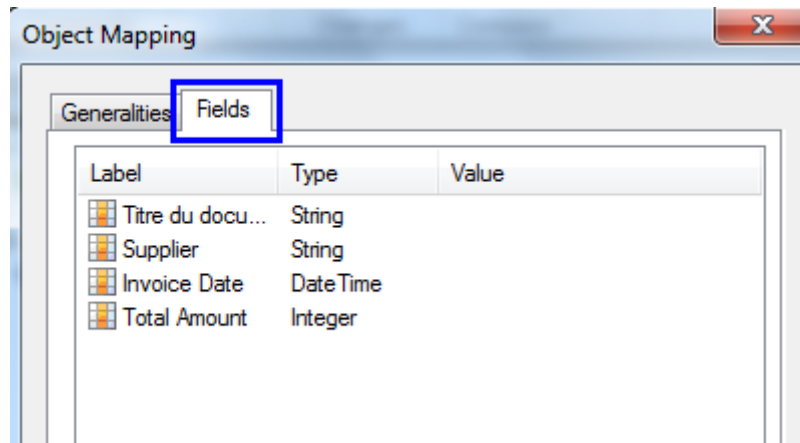
The object types you see in the list are the ones that are available in your ECM system.



When you are done selecting these options you can do the **Index Mapping** on the **Fields** tab.

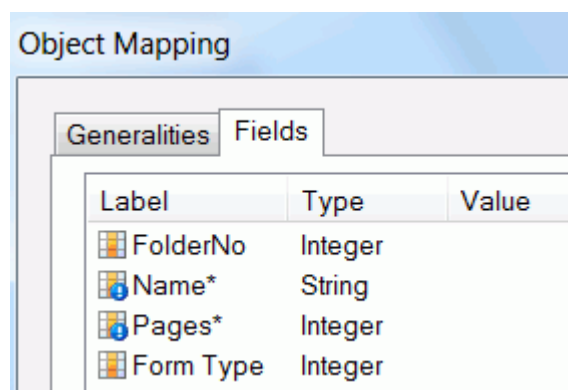
INDEX MAPPING

- Click the **Fields** tab.



- The fields you see here are the index fields that are available on your ECM system for the **Object type** you selected on the **Generalities** tab.

The fields that have an asterisk are mandatory.

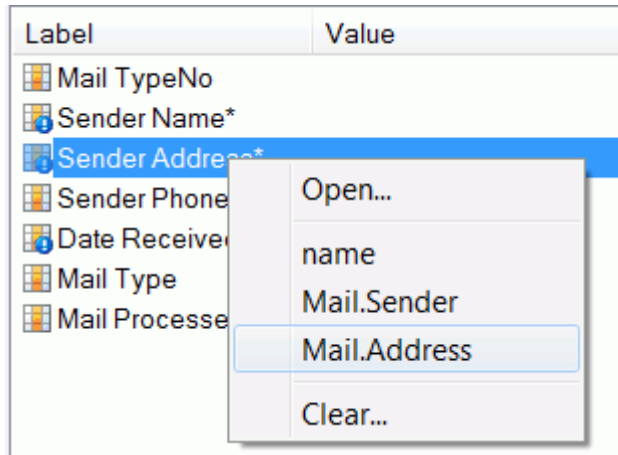


- Right-click a field to map it to another index field.

The index fields you see in the right-click menu are:

- the fields you created manually in the IRISConnect interface, via the **Index** function 

- Or the fields that are available in your I.R.I.S. solution, if you are using IRISConnect from within an I.R.I.S. solution.



Note: if you are using IRISConnect from within an I.R.I.S. solution and you don't see any fields when you right-click, this means you haven't created any indexes in your I.R.I.S. solution.

Note: when you are doing a fully manual configuration from within IRIS Powerscan, you can create the index fields in IRISConnect and afterwards create the exact same indexes in IRIS Powerscan.

How to create index fields in IRISConnect has been explained in **Step 2: Define Rule Sets.**

Attention: depending on the ECM system you export to, you must respect certain structure conventions when creating rules. See **Part 3: Particularities about the Connectors** for more information.

PART 2: IRISCONNECT COMBINED WITH I.R.I.S. SOLUTIONS AS INPUT SOURCE

INTRODUCTION

IRISConnect can be used in combination with I.R.I.S.' high-end scanning and document management solutions IRIS Powerscan, IRIS Document Server, IRIS Capture Pro and IRIS Xtract for Documents. You will also be able to use it in combination with I.R.I.S.' own ECM system IRISNext as of version 7.4

In this chapter we discuss how to set up IRISConnect from within these I.R.I.S. solutions. The basic, common configuration is similar for all connectors and has been discussed in **Part 1**.

IRISCONNECT COMBINED WITH IRISPOWERSCAN

IRISConnect can be configured in different ways in combination with IRIS Powerscan. You can configure it by means of:

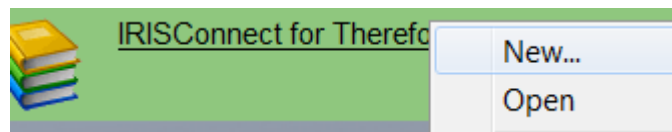
- **Convenient Configuration Wizards**

As soon as you've registered an IRISConnect connector, a dedicated Quick Project is created in IRIS Powerscan. These Quick Projects feature the Configuration Wizards that allow you to set up IRISConnect in just a few steps.

Note: when you only use the Configuration Wizard, you won't see the IRISConnect interface. Wizards are useful when doing a very basic configuration.

- **Combining the Configuration Wizards with a Manual Configuration**

When you create a new Quick Project based on an IRISConnect Quick Project, for instance IRISConnect to Therefore, you can still use the Configuration Wizard, but you also have access to the Project Setup in IRIS Powerscan.



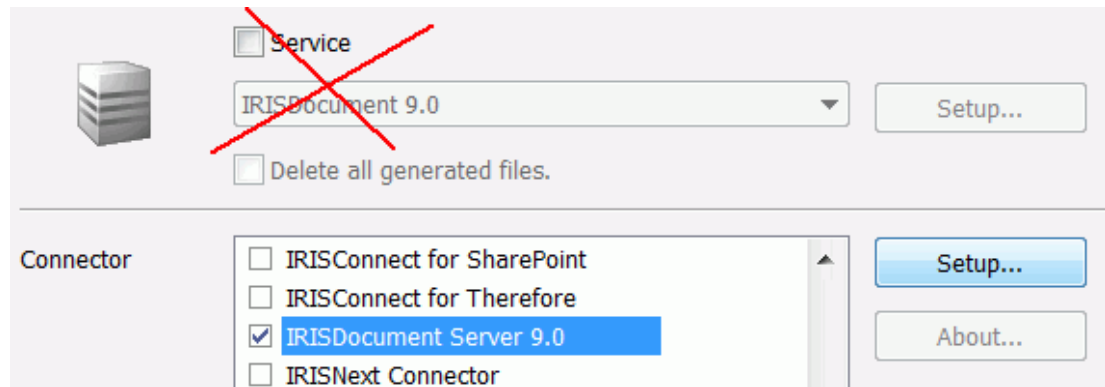
Via the Project Setup you can then access the IRISConnect interface to do a more advanced configuration, using multiple Connections, Rule Sets and Rules.

- **A fully manual configuration**

A fully manual configuration of IRISConnect can be done when using a new Project based on the Demo project in IRIS Powerscan. In this case you don't have any Configuration Wizards.

Attention: when doing a fully manual configuration you also need to manually do the index mapping between the index fields of your ECM system and those of IRIS Powerscan. See the section on **Index Mapping**.

Important note: in case you need to process very large quantities of batches, you can connect multiple IRIS Powerscan stations to IRISConnect via **IRISDocument Server**. In that case, your output documents are not generated by the IRISDocument **Service** in IRIS Powerscan, but by the more powerful IRISDocument Server **connector**.



For more information on how to include IRISDocument Server in the process, see the section on **IRISDocument Server + IRIS Powerscan**.

PRELIMINARY NOTE

Make sure you have IRIS Powerscan version **9.6** installed on your system.

If you have a previous version of IRIS Powerscan (9.5) you need to update the software:

- Contact I.R.I.S. Technical Support at **activation@iriscorporate.com** to obtain the **IRIS Powerscan 9.6 Updater cd-rom**.
- Insert the IRIS Powerscan 9.6 updater cd-rom in the cd-rom drive of your computer.

- Run the **IRISPowerScanUpdater.exe** from the cd-rom and follow the on-screen instructions.

IMPORTANT NOTE ABOUT THE IRISPOWERSCAN 9.6 UPDATE

We mentioned that IRISConnect is compatible with IRISPowerScan as of version **9.6**.

In the previous version of IRISPowerScan, version 9.5, there were already a few connectors that are now covered by IRISConnect. These connectors are **Therefore, SharePoint, FileNet** and **IRISNext**. Consequently, there are a few particularities to take into account when updating from IRISPowerScan 9.5 to IRISPowerScan 9.6.

Particularities

- **In case the Therefore, FileNet or IRISNext connectors were registered in IRISPowerScan 9.5:**

Then, they will also be registered when you update to IRISPowerScan 9.6 and install IRISConnect.

The old connector Quick Projects are replaced by the new Quick Projects. For instance, instead of **Scan to Therefore**, you'll see **IRISConnect for Therefore**.

The configuration of the old connectors is still accessible from the **Connectors** list in **Project Setup > Processing**. This way, users can convert their existing projects manually to the IRISConnect configuration. The old connectors will not be visible in the **Add-ons** list on the **Help** menu.

- **In case the SharePoint connector was registered in IRISPowerScan 9.5:**

Then you will still see the old Quick Project when you update to IRIS Powerscan 9.6 and install IRISConnect.

The new SharePoint connector *is not* registered automatically by upgrading. You need to obtain a new software key.

When you register the new IRISConnect for SharePoint connector, the old connector remains available. In other words, the two connectors and their corresponding Quick Projects co-exist. It is recommended to use the new IRISConnect connector, though.

- **In case the Therefore, SharePoint, FileNet and IRISNext connectors were *not registered* in IRIS Powerscan 9.5:**

Then, they are simply replaced by the new IRISConnect connectors when you update to IRIS Powerscan 9.6 and install IRISConnect.

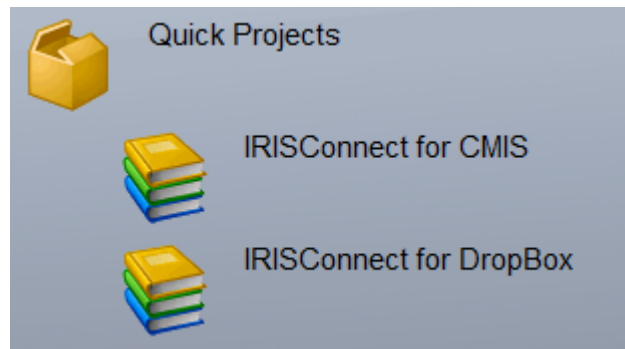
To update IRIS Powerscan 9.5 to version 9.6:

- Insert the IRIS Powerscan 9.6 updater cd-rom in the cd-rom drive of your computer.
- Run the **IRIS Powerscan Updater.exe** from the cd-rom and follow the on-screen instructions.

USING THE IRIS POWERSCAN CONFIGURATION WIZARDS

As soon as you've registered an IRISConnect connector, a dedicated Quick Project is created in IRIS Powerscan.

Example



Tip: to learn how to register a connector, see the topic **Registering IRISConnect**.

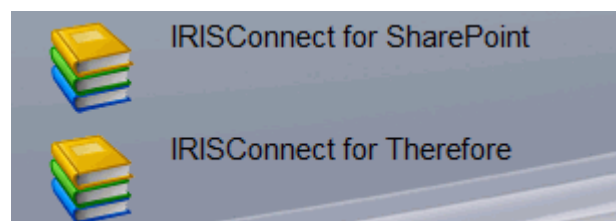
The Quick Projects use predefined settings and contain the Configuration Wizards.

The Configuration Wizards guide you through the different steps of a **quick, basic configuration**. Once you have gone through the steps, the documents you scan and process are exported via IRISConnect. The IRIS Powerscan **Project Setup** is unavailable. This means you cannot change any other (advanced) IRIS Powerscan settings outside the Wizard.

All Wizards are structured in the same way, for every connector. There are only slight differences when it comes to setting up a connection. This is due to the fact the various ECM systems require different login credentials. The particularities of each ECM system can be found in **Part 3: Particularities about the Connectors**.

Starting the Wizard

- In the IRIS Powerscan start-up screen, double-click the Quick Project of your connector to start the Configuration Wizard.

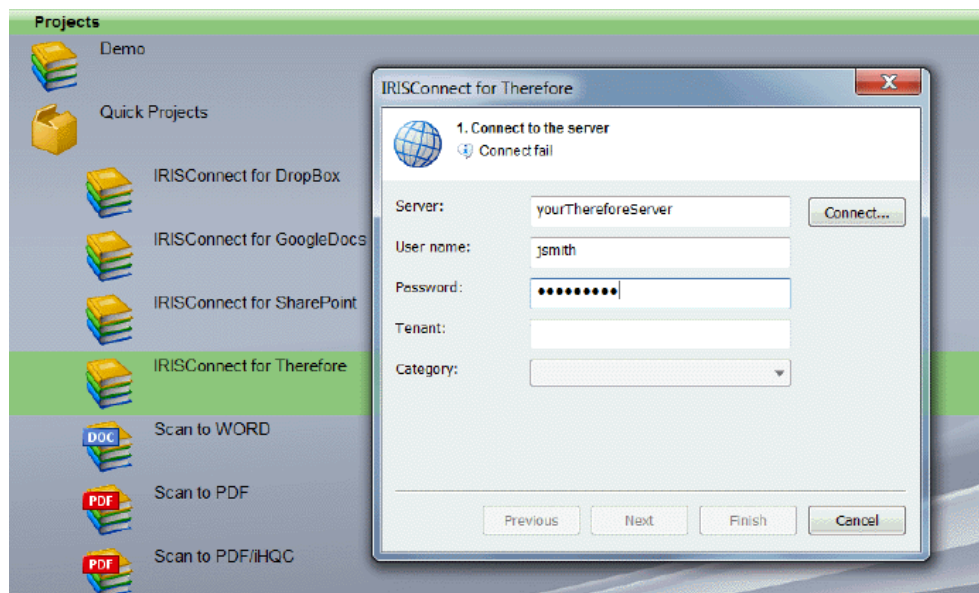


Tip: if you want to use the Configuration Wizard combined with a Manual configuration, right-click your Quick Project and click New to create a new Quick Project. See the topic **Using the Configuration Wizards combined with a Manual Configuration** for more information.

- The Wizard goes through the following steps:

Step 1: Connect to the Server

This is the mandatory step.



- Enter the server link and your login credentials.

The login credentials differ from one ECM system to another, so this screen also differs from one connector to another. Again, see **Part 3: Particularities about the Connectors**.

- Then click the **Connect** button.

Note: in some case you need to click **Connect** twice: one time to establish the connection, and one time to connect to the underlying database/category/etc.

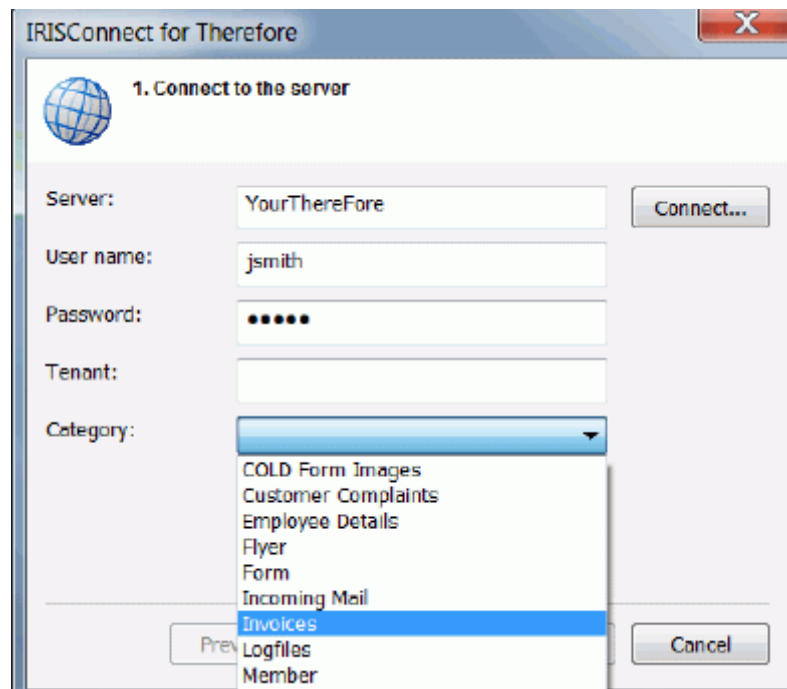
- Click **Next** to continue with **Step 2** or click **Finish** to open the project/package and start processing documents.

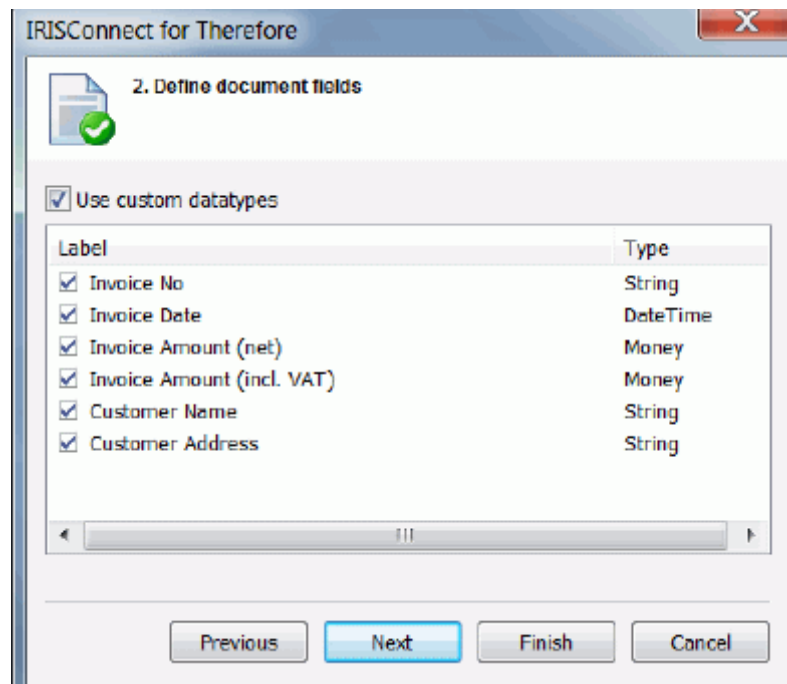
Step 2: Define document fields

Based on the settings you selected in Step 1, the Wizard automatically retrieves all the corresponding fields that are available in your ECM system.

Example

Suppose you selected **Invoices** at Step 1 of the Therefore Wizard. Then you will see the following available fields at step 2.



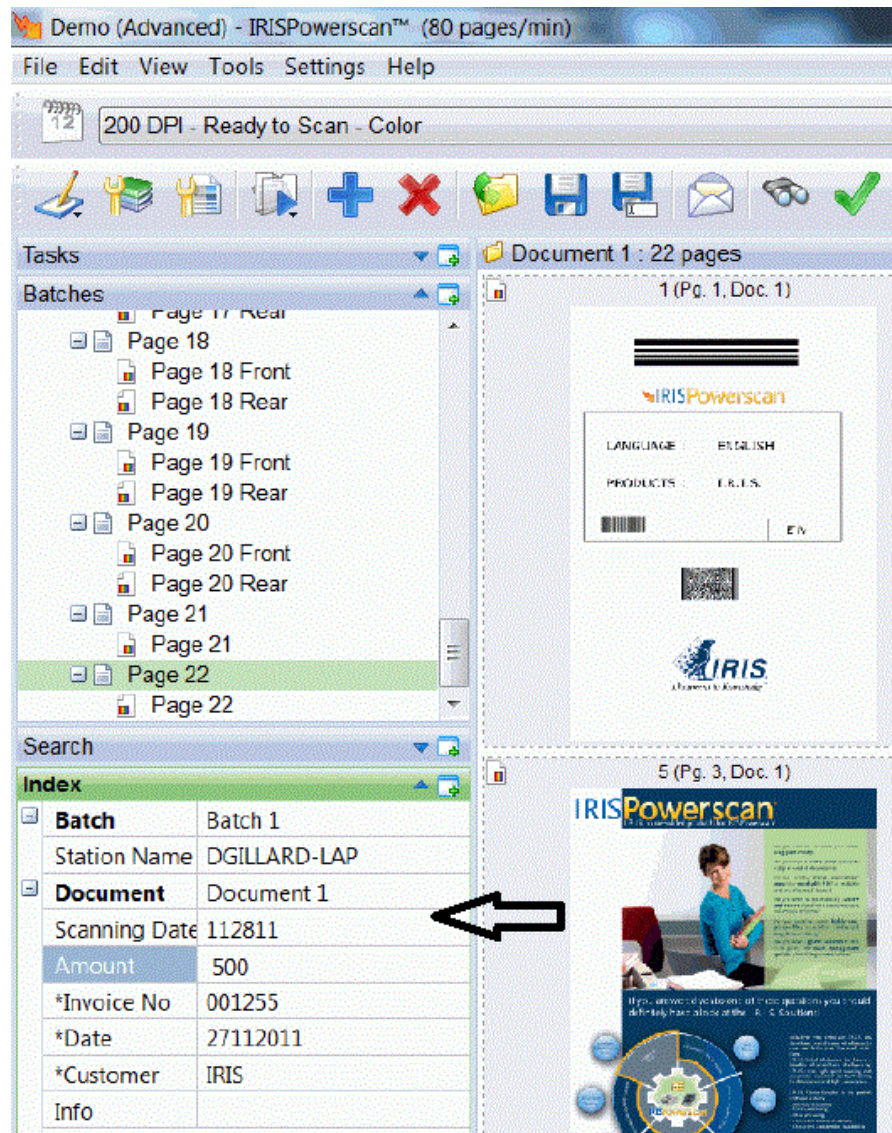


The fields you see listed in Step 2 of the Wizard are the ones that are available in your ECM system - in this case Therefore.

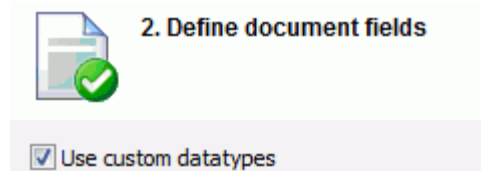
- Select the document fields you want the Wizard to create in IRIS Powerscan.

By default, the Wizard creates them all.

The document fields you select in step 2 of the Configuration Wizard appear in the **Index** section of IRIS Powerscan after scanning a batch or document. When you fill in the index fields in IRIS Powerscan, they will be exported to the corresponding index fields in your ECM system. Hence, you can export fully indexed documents thanks to IRISConnect.



If you keep the default option **Use custom data types** activated in step 2 of the Wizard, then you have to fill in the document types fields according to specific naming conventions in IRIS Powerscan. The fields that are mandatory are marked in red.



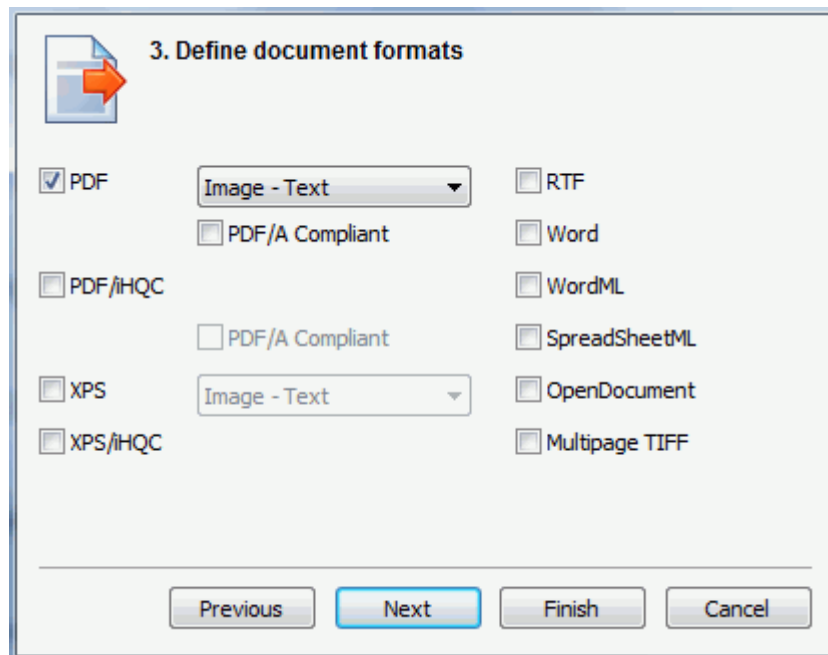
If you deactivate the option **Use custom data types** in the Wizard, then all document fields can be filed in as text in IRIS Powerscan.

- When you are done, click **Next** to continue the configuration or click **Finish** to open the project/package and start processing documents.

Step 3: Define document formats

During this step you can select the output format you want to generate.

Note: IRIS Powerscan uses I.R.I.S.' iHQC technology. iHQC™ is patent-protected. US Patent No. 8,068,684.



- Select the options of your choice:

PDF

- **PDF Image-Text** generates searchable PDF files that contain the original page image on top of the recognized text.
- **PDF Image** generates image PDFs. They are not text-searchable.
- **PDF Text** generates Text PDFs and creates graphic zones as images.
- **PDF Text-Image** generates PDF files in which the recognized text is placed on top of the image.
- **PDF/A compliant** generates PDF/A files that are suitable for long-term archiving.

PDF-iHQC: generates highly-compressed PDF files using intelligent High-Quality Compression technology.

The PDF-iHQC files can also be PDF/A-compliant.

XPS

- **XPS Image-Text** generates searchable XPS files that contain the original page image on top of the recognized text.
- **XPS Image** generates image XPS files. They are not text-searchable.
- **XPS Text-Image** generates XPS files in which the recognized text is placed on top of the image.

XPS-iHQC: generates highly-compressed XPS files using intelligent High-Quality Compression technology.

RTF: generates RTF (Rich Text Format) files.

Word: generates Microsoft Word files.

WordML: generates WordML files (supported by Microsoft Word 2007 and 2003).

SpreadSheetML: generates SpreadsheetML output (supported by Microsoft Excel 2007, 2003 and 2002).

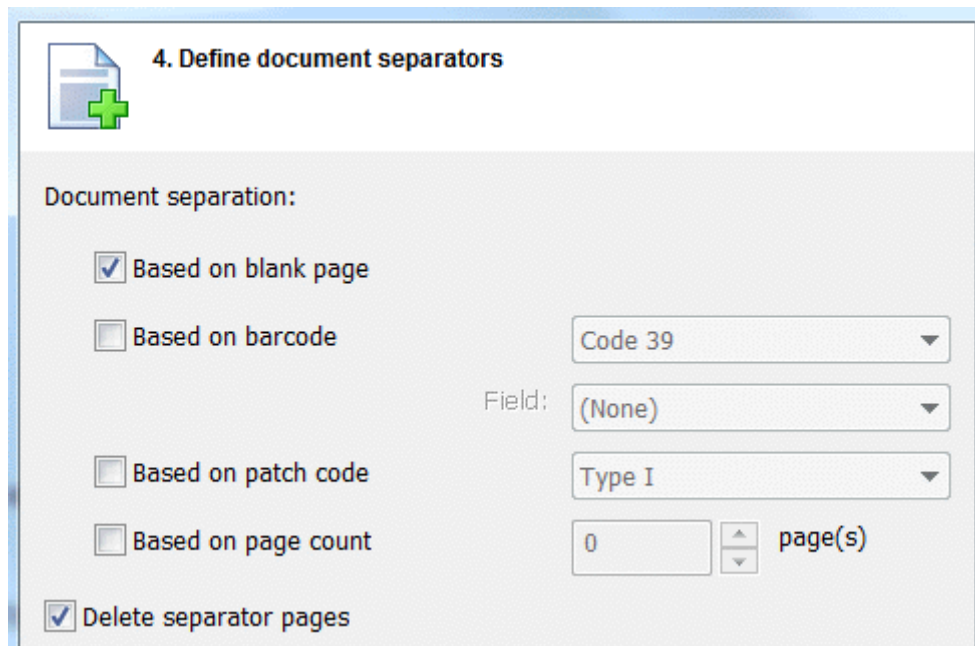
OpenDocument: generates OpenDocument files (XML-based open format).

Multipage TIFF: generates Multipage TIFF files.

- Click **Next** if you want to continue the configuration or click **Finish** to open the project/package and start processing documents.

Step 4: Define document separators

During this step you can select how you want to separate your documents. You can separate documents based on **blank pages**, **barcodes** and **patch codes**. When IRIS Powerscan encounters one of those it will know to start a new document. You can also configure IRIS Powerscan to start a new document after a certain number of pages (**page count**).



Separation options

- **blank pages**

- **barcodes**

Select the type of barcode that will be used to separate documents.

Field: indicate the index field (of the **Index** Pane in IRIS Powerscan) where the barcode values must be inserted.

- **patch code**

Select the type of patch code that will be used to separate documents.

- **page count**

Indicate after how many pages you want IRIS Powerscan to start a new document.

- When you are done, click **Finish** to open the project/package and start processing documents.

Next steps

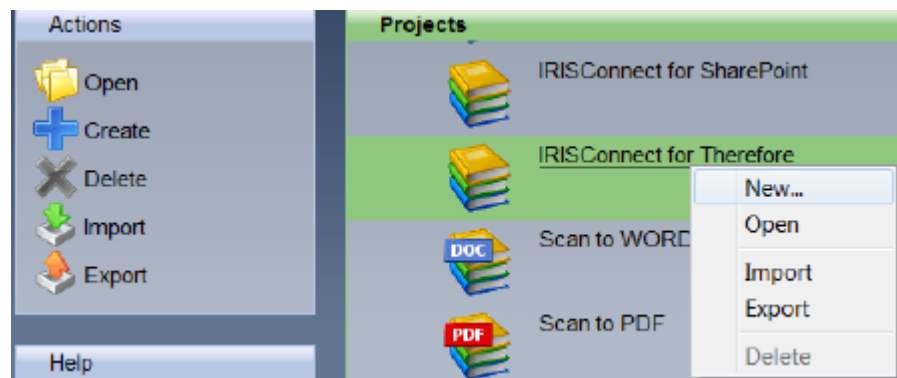
Go to the ECM system you defined in Step 1 of the Wizard to find your exported documents.

USING THE CONFIGURATION WIZARDS COMBINED WITH A MANUAL CONFIGURATION

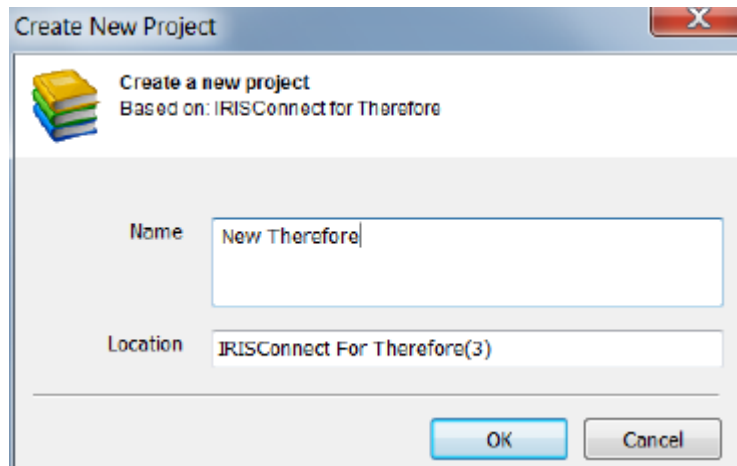
In case you want to use the Configuration Wizards but also want to have access to the IRISConnect interface to do a manual configuration, then you need to create a new Quick Project based on your connector's Quick Project.


To create a new Project:

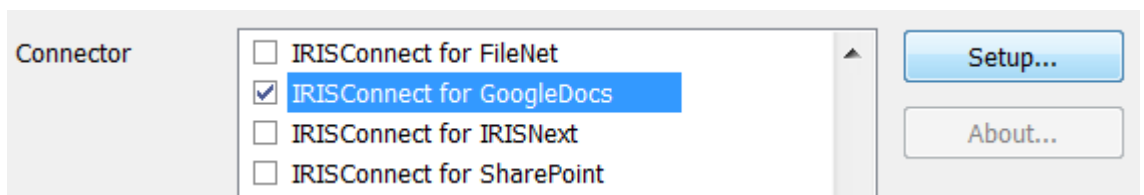
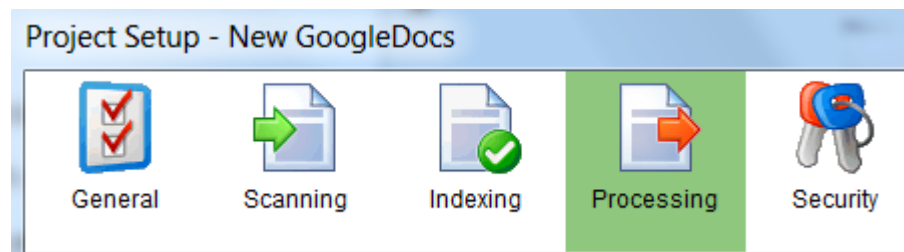
- Right-click the Project and click **New**.



- Name the new Project and make sure to keep the default location.



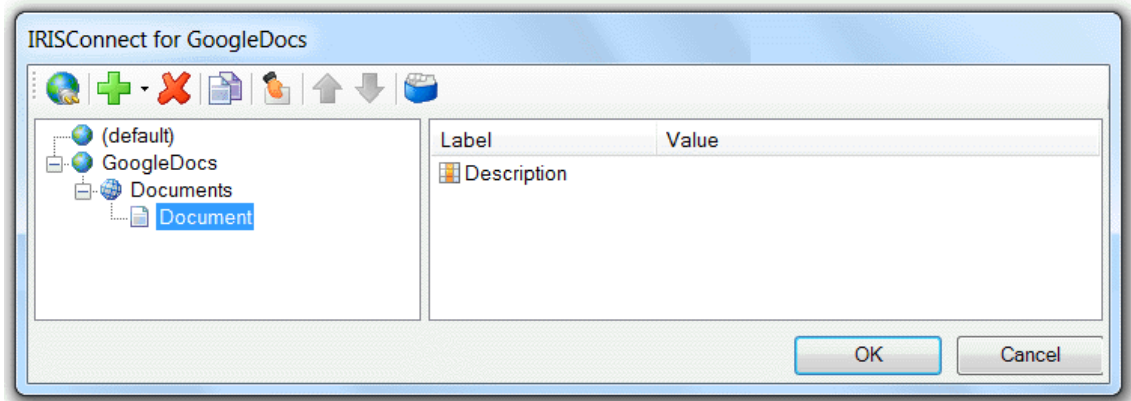
- Click **OK** to start the Configuration Wizard. Then go through the steps we discussed in the section **Using the IRIS Powerscan Configuration Wizards**
- When you are done, you can access the IRISConnect interface via **Project Setup** .
- Click the **Processing** tab, select your connector from the **Connector** list and click **Setup**.



- The IRISConnect interface opens.

The connection you established via the Wizard will be displayed.

Now you can add Rule Sets and Rules, modify the Index mapping, add additional connections, and so on.



Next steps

When you are finished with the configuration, return to your Project to scan and process your documents.

Tip: before trying to export batches of documents, scan and process just a few documents first. Then go to your ECM system and check if:

- all documents have been exported
- all documents are exported correctly to the right location
- all indexes are filled in and displayed correctly

DOING A FULLY MANUAL CONFIGURATION

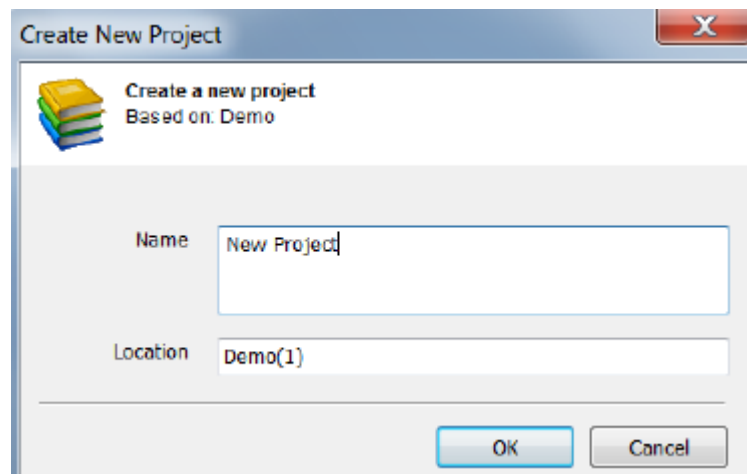
In IRIS Powerscan you can also do a **fully manual** configuration of IRISConnect.


A manual configuration allows you to configure all possible IRIS Powerscan settings. You don't use any predefined settings from the Configuration Wizards.

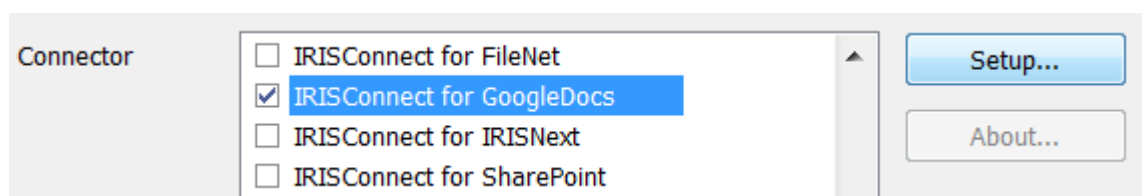
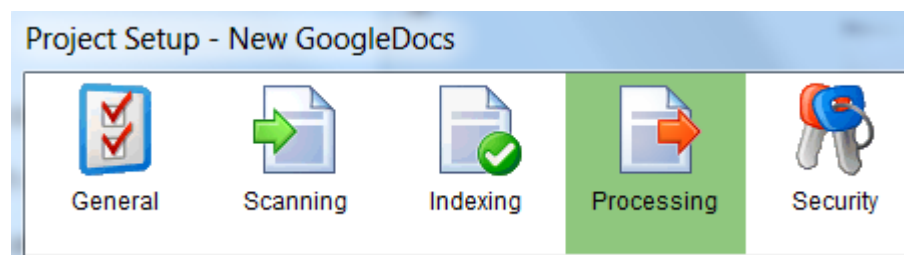
To do a fully manual configuration, you must first create a new Project from scratch.

To do so:

- Right-click the **Demo** project and select **New**.
- Name the new Project and make sure to keep the default location.

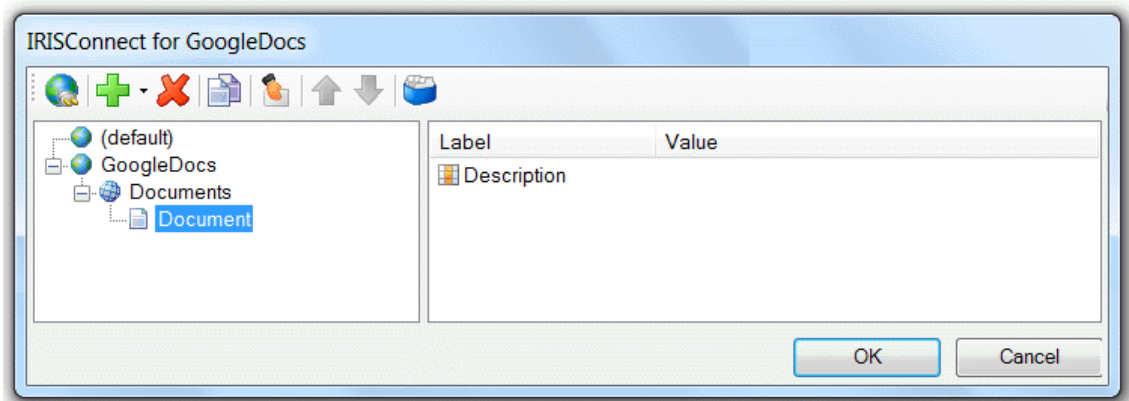


- Then go to the **Project Setup**  to access the IRISConnect interface.
- Click the **Processing** tab, select your connector from the **Connector** list and click **Setup**.



- The IRISConnect interface opens.

Now you can add Rule Sets and Rules, create Index fields and do the Index mapping, add additional connections, and so on. Refer to **Part 1** to learn how to do so.



Important note: when you are doing a fully manual configuration, you must first create index fields in IRIS Powerscan before you can map them to the index fields of your ECM system. Refer to the complete **IRIS Powerscan documentation** to learn how to create Indexes in IRIS Powerscan.

Next steps

When you are finished with the configuration, return to your Project to scan and process your documents.

Tip: before trying to export batches of documents, scan and process just a few documents first. Then go to your ECM system and check if:

- all documents have been exported
- all documents are exported correctly to the right location
- all indexes are filled in and displayed correctly

IRISCONNECT COMBINED WITH IRISDOCUMENT SERVER + IRISPOWERSCAN

If you need to scan and process huge quantities of documents, it may be useful to connect multiple IRIS Powerscan stations to IRISConnect. You can do this by including IRIS Document Server in the process.

With IRIS Document Server it's possible to configure **multiple Watched Folders** to which the different IRIS Powerscan stations send their scanned documents. The conversion of the scanned documents into output formats is no longer done inside IRIS Powerscan by the IRIS Document service, but outside IRIS Powerscan thanks to the more powerful **IRIS Document Server connector**.

Note: in order to include IRIS Document Server in the process you need to have access to the Project Setup inside IRIS Powerscan. Consequently you need to create a new Quick Project based on an existing Connector Quick Project or based on the Demo project.

PRELIMINARY NOTE

Make sure you have IRIS Powerscan version **9.6** and IRIS Document Server **9.5.2** installed on your system.

In case you need to update a previous IRIS Powerscan 9.5 version to 9.6, refer to the **Preliminary note** in the IRIS Powerscan section.

To update from a previous version of IRIS Document Server, contact I.R.I.S. Technical Support at **irisdocument@iriscorporate.com** to obtain a new installation cd-rom.

DESCRIPTION OF THE IRISPOWERSCAN - IRISDOCUMENT SERVER - IRISCONNECT PROCESS

The different IRIS Powerscan stations scan their documents. They are sent to IRIS Document Server for conversion. IRIS Document exports them to IRIS Connect so that the indexes from IRIS Powerscan are maintained in the ECM systems you export them to.

Despite the seemingly many steps, this is an automatic and speedy process, once it has been configured correctly.

PRELIMINARY REQUIREMENTS

- IRIS Document Server requires a customized ids.bat to be able to call an IRIS Connect connector. See the topic **Creating a customized ids.bat file**.
- You need to set up a Watched Folder in the stand-alone application IRIS Document Server, before you can configure the IRIS Document Server connector from within IRIS Powerscan. See the topic **Set up a Watched Folder** for more information.

Note: in case you want to use IRIS Document Server as a stand-alone application to send documents to IRIS Connect, see the section **IRIS Document Server stand-alone**. Note, however, that IRIS Document is **not able to send indexed documents**. Consequently, you must make sure that your ECM system does not contain mandatory index fields, since IRIS Document will not be able to fill them in.

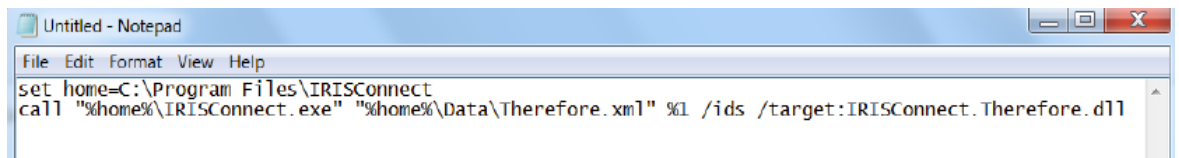
CREATING A CUSTOMIZED IDS.BAT FILE

- Open **Notepad**.
- Then type the following:

```
set home=C:\Program Files\IRISConnect
```

```
call "%home%\IRISConnect.exe"  
"%home%\Data\YOURCONNECTOR.xml" %1 /ids  
/target:IRISConnect.YOURCONNECTOR.dll
```

Example



Note that "YOURCONNECTOR" must be replaced by the connector of your choice, e.g. call "%home%\IRISConnect.exe" "%home%\Data**Therefore.xml**" %1 /ids /target:IRISConnect.**Therefore.dll**

- Then click **File > Save As** and name the file **ids.bat**.

Make sure the extension is .bat and not .txt.



Important notes:

- In order for the ids.bat file to work, your connector must be registered correctly in IRISConnect.

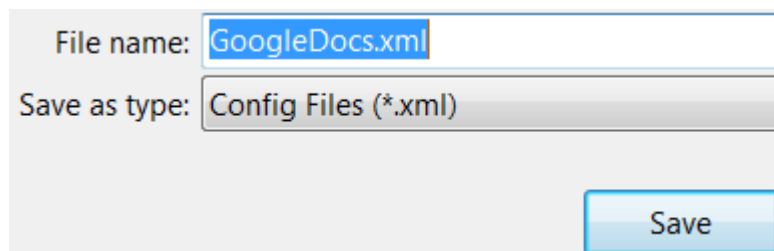
- An **xml configuration file** must exist for your connector in C:\Program Files\IRISConnect\Data

Tip: if you don't have an xml file for your connector, follow the following procedure:

- Open **IRISConnect** from the Windows **Programs** menu.
- Then double-click your connector (provided it's registered)
- Click the green cross. You will be prompted to save a xml file in C:\Program Files\IRISConnect\Data



Example



SET UP A WATCHED FOLDER IN IRISDOCUMENT SERVER

In this topic we discuss how to set up a Watched Folder in the stand-alone application IRISDocument Server.

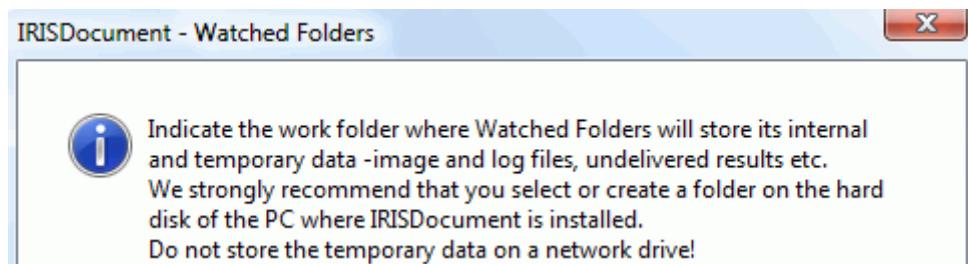
This step is necessary in order to be able to select a Watched Folder in the **IRISDocument Server Connector** from within IRIS Powerscan. Once you have set up a Watched Folder, see the

section See **Configuring the IRISDocument Server connector from within IRIS Powerscan.**

To set up a Watched Folder:

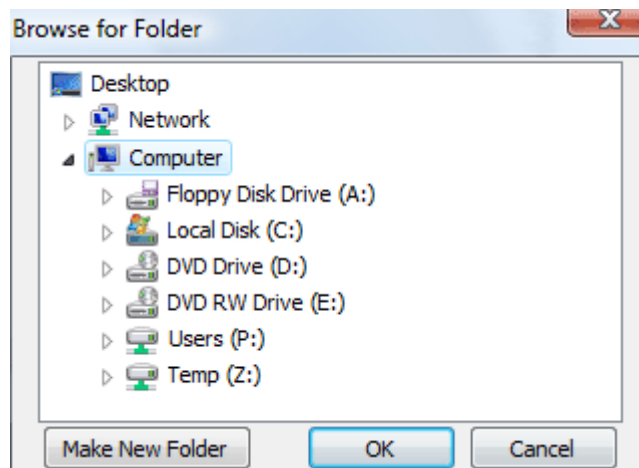
- From the Windows **Start** menu, select **Programs>IRISDocument Server 9.5>Watched Folders.**
- When you run IRISDocument Server for the first time, you will be prompted to indicate a work folder in which IRISDocument stores all temporary data that is being processed, such as image and log files, and temporary and undelivered results.

This work folder should be located on a hard disk that has sufficient free memory.



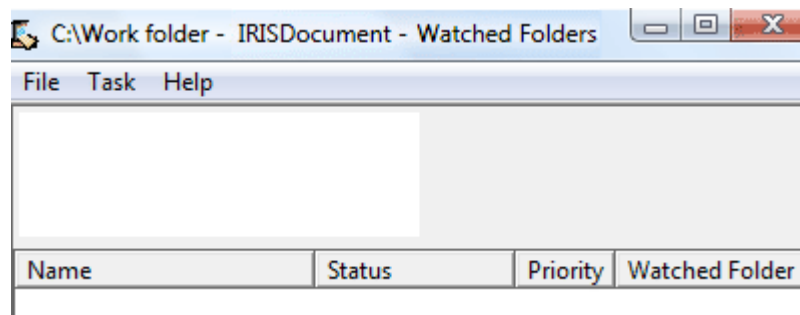
Note: if you installed the **Workgroup add-on** and selected **Workgroup initial data** during the installation, then a complete Watched Folder configuration will be preconfigured. The preconfigured work folder will be located in **C:\IRISDocument_9.5\Storage.**

- Select a location, or create a new one on your computer, which you want to use as work folder.



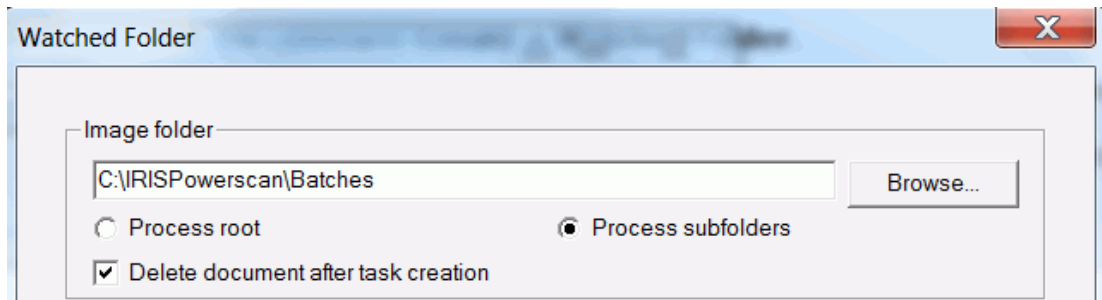
Note that IRISDocument Server must have fast access to the work folder. Therefore, it is mandatory you select or create a folder on a local hard disk instead of on a network. Bandwidth and network issues, such as time-outs, inconsistent time or time zone settings etc., might slow down IRISDocument Server considerably.

- As soon as you click **OK**, the empty **user interface** will open.



- Open the **File** menu and click the command **Create a Watched Folder**.
- In the window that opens, click **Browse** to browse for the folder you want to use as Watched Folder.

Important note: this must be the folder where IRIS Powerscan stores its scanned images. By default, this is **C:\IRIS Powerscan\Batches**.



- Then select the **Watched Folder** settings.

Image folder

IRISDocument Server can either **Process the root** of a selected folder or **Process the subfolders**.

When processing the **root** of a selected folder, the images are erased automatically from that folder once they have been processed. Otherwise, they would be processed over and over again.

When processing the **root** of a selected folder, IRISDocument also processes the images that are located at 1 level below the root.

When processing the **subfolders**, the root folder is ignored and only the subfolders are processed. The images and subfolders are deleted after task creation by default, and stored in the work folder. You can also choose to keep a copy of the documents in their original folder by clearing the box **Delete document after task creation**. These documents will not be processed over and over since IRISDocument Server can detect which documents are already being processed by means of **run files**.

End of task detection

The End of task detection options allow you to determine how the stream of scanned images will be broken up in separate tasks.

End of task detection	
<input type="radio"/> Timeout (seconds)	60
<input checked="" type="radio"/> File detection	eod.inf
Name of run file:	run.inf

Time-out

If the contents of a watched folder do not change for a certain time, IRISDocument Server will start converting all documents in that folder as a single task.

File detection

When processing subfolders, you can drop an end of task file (eod.inf) in a watched folder. As soon as IRISDocument Server encounters the file, it will know the task is completed and it will start the next one. All documents up to the eod file will be processed as part of a single task. Note: make sure to arrange you documents in the right order up to each eod file. Otherwise your output documents will be processed incorrectly.

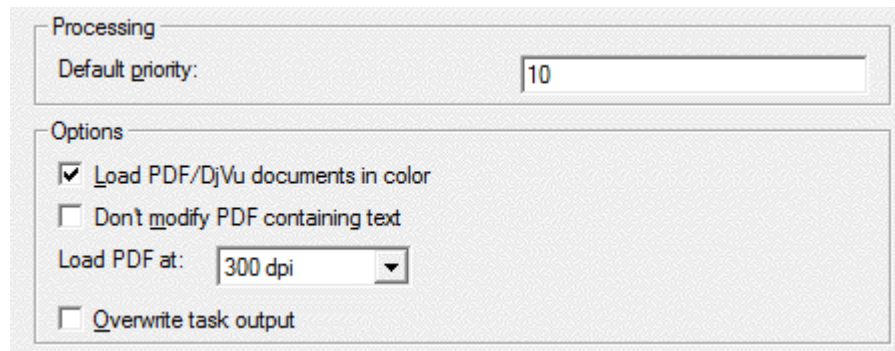
For each task indicated by an end of task file, IRISDocument Server creates a **run file** in the image folder, to indicate to the user that this specific task is being processed.

All images for which a run file exists are ignored as the folder monitoring continues. This way, the images do not need to be removed from the source image folder.

Note, however, that the **End of task detection** settings are not the only way to organize a stream of scanned documents. There are also specific **document separation options** to select. Consult the separate IRISDocument Server documentation for more details.

Processing

IRISDocument Server handles several watched folders simultaneously. The watched folder with the highest priority is processed first.



The screenshot shows a dialog box with two main sections: 'Processing' and 'Options'. In the 'Processing' section, there is a label 'Default priority:' followed by a text input field containing the number '10'. The 'Options' section contains four items: a checked checkbox for 'Load PDF/DjVu documents in color', an unchecked checkbox for 'Don't modify PDF containing text', a label 'Load PDF at:' followed by a dropdown menu showing '300 dpi', and an unchecked checkbox for 'Overwrite task output'.

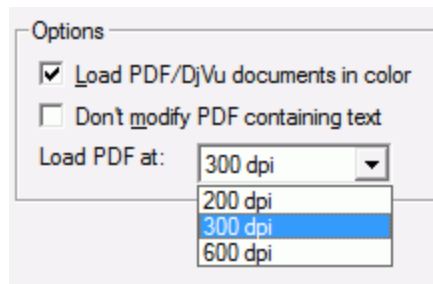
Open the **Task menu** to change the priority of specific tasks. Note, however, that the **Task menu** cannot be opened when the OCR is in progress; the current process needs to be aborted first.

Options

- IRISDocument by default loads **PDF and DjVu documents in color**. Should you want to load these documents in black-and-white to reduce the processing time, then clear this option.
- **Note:** do not select the option **Don't modify PDF containing text**. This option will cause problems combined with IRIS Powerscan and IRISConnect.

When processing PDF documents, IRISDocument first converts them into image files (This process is called rasterization). The image files are then processed and converted into output documents.

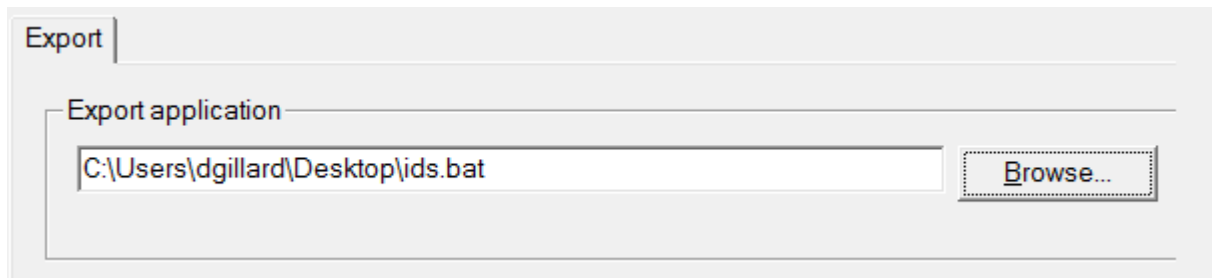
The resolution at which IRISDocument extracts image files from PDF documents can be determined: select the appropriate resolution in the drop-down list, right of **Load PDF at:**



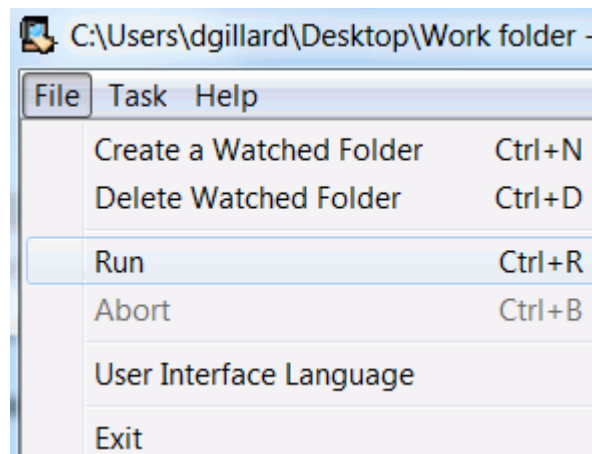
- IRISDocument by default loads PDF documents at **300 dpi**.
- Select **200 dpi** to increase the processing speed.
- Select **600 dpi** to increase the processing accuracy.
- Select **overwrite task output** in case you want to overwrite the documents that are left in the output folder when starting another task.

Next steps

- When you are done configuring the Watched Folder settings, keep clicking **Next** until you reach the **Output folder** step. Select any output folder. This output folder is of no importance here in the IRIS Powerscan – IRISDocument Server - IRISConnect process.
- Then keep clicking **Next** again until you reach the **Export** step. Copy the file **ids.bat** you created to the folder on the computer where IRISDocument Server is installed.
- Now click the **Browse** button and indicate in which folder the **ids.bat** file is stored.



- Click **Next** again, and then click **Finish**.
- Next, go to the **File** menu and click **Run** to start monitoring the Watched Folder.



- Once you have completed these steps, you can configure the IRISDocument Server connector from within IRIS Powerscan.

Notes

The processing can be aborted by means of the **Abort** command in the **File** menu.

Note that aborting the process may take some time. IRISDocument always finishes the task in progress before interrupting. Watched folders cannot be created, edited or removed when the OCR is in progress.

When the process is aborted, the lower part of the interface displays the pending tasks and their status.

Name	Status	Priority	Watched Folder
task_062207_00000003	New	10	1
task_062207_00000004	New	10	1
task_062207_00000005	New	10	1


The status of the various OCR tasks can also be verified in the work folder.

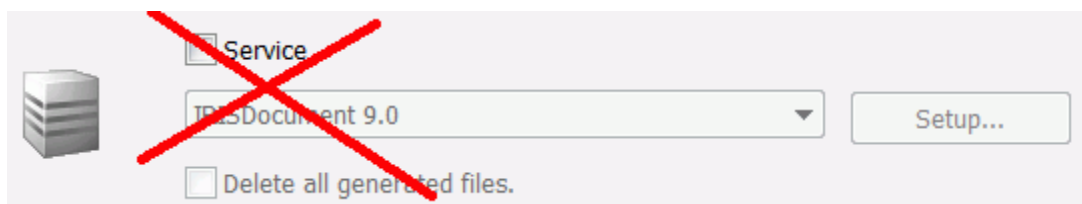
The pending tasks can be edited in the **Task menu**: select the tasks you want to edit in the lower part of the application and click the command **Edit selected tasks**.

CONFIGURING THE IRISDOCUMENT SERVER CONNECTOR FROM WITHIN IRISPOWERSCAN

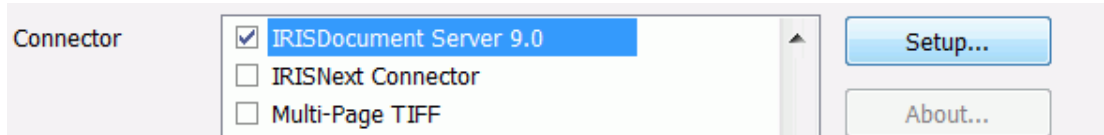
Once you have set up a Watched Folder in IRISDocument Server, you can configure the IRISDocument Server connector from within IRISPowerscan.

To do so:

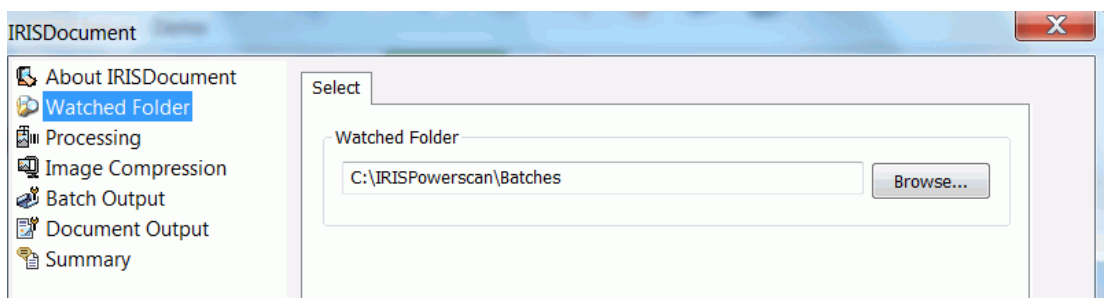
- Open the Quick Project you created.
- Access the the **Project Setup** by clicking  in the main toolbar.
- Then click the **Processing** tab.
- In case the **IRISDocument Service** is activated, deactivate it.



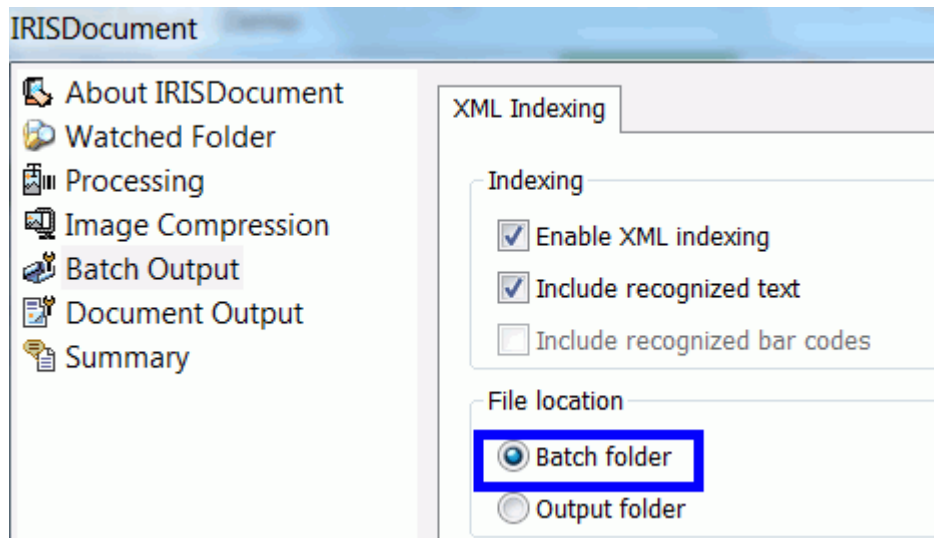
- In the **Connector** list, select **IRISDocument Server**, then click **Setup**.



- In the window that opens, click **Watched Folder**. Then browse for the Watched Folder you created in the stand-alone application IRISDocument Server.



- Then click **Batch Output**. Select **Enable XML indexing** and **Include recognized text**. Then select **Batch folder** instead of Output folder.



- Click **Document Output** and select the output formats you want to generate.

Refer to the complete IRISDocument Server documentation for more information about the possible output formats.

- When you are done here, you can start scanning documents in IRIS Powerscan. They will be sent to the ECM system you configured.

IRISCONNECT COMBINED WITH IRISDOCUMENT SERVER

IRISDocument Server can also be configured as stand-alone application to send documents via IRISConnect.

Note, however, that IRISDocument Server is not able to index documents. Consequently, your documents will not contain indexes in your ECM system.

<p>Attention: if your ECM system has mandatory index fields, which must be filled in, then the export via IRISDocument Server will fail. Therefore, make sure your ECM system does not contain mandatory fields. If you cannot modify the mandatory fields, contact the ECM system administrator.</p>
--

PRELIMINARY NOTE

Make sure you have IRISDocument Server version **9.5.0.2** installed on your system.

If necessary, contact I.R.I.S. Technical Support at **irisdocument@iriscorporate.com** to obtain the correct installation cd-rom.

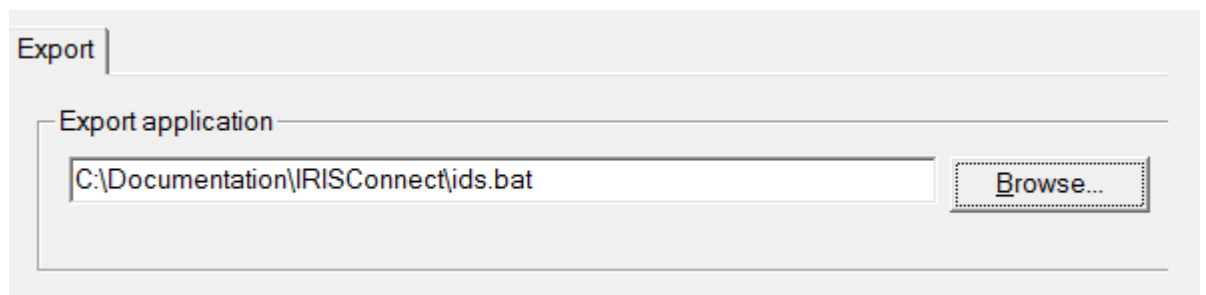
CONFIGURING IRISDOCUMENT SERVER WITH IRISCONNECT:

- Configure your IRISConnect connector as explained in Part 1.

Important note: remember to save your connector's configuration .xml file. Then close the IRISConnect application before processing your documents with IRISDocument Server.

- Configure IRISDocument Server like you would normally do. When you come to the **Export** tab, and browse your connector's customized ids.bat file.

To learn how to create the required .bat file refer to the section **Creating a customized ids.bat file.**



IRISCONNECT COMBINED WITH IRISCAPTURE PRO

IRISCapture Pro can be used in combination with IRISConnect to send your invoices and forms to the ECM systems of your choice.

Note: the procedures described in this documentation currently apply to **IRISCapture Pro for Invoices** only.

PRELIMINARY NOTE

Make sure you have IRISCapture Pro version 8.51 installed on your system.

In case you need to update from a previous 8.5x version:

- Log in to the I.R.I.S. maintenance site at <http://maintenance.irislink.com>.
- Go to the **IRISCapture Pro for Invoices** section and download the patch called **ICP 8.51i**.
- Or contact I.R.I.S. Technical Support at **activation@irisporate.com**.

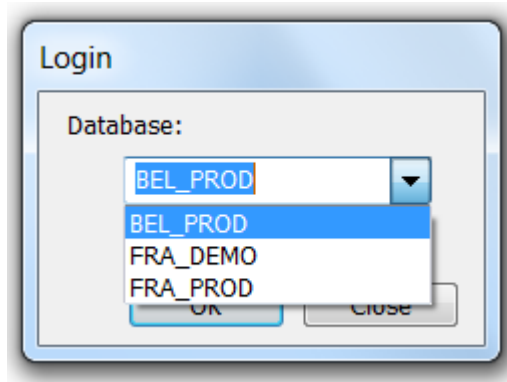
UPDATE TO VERSION IRISCAPTURE PRO 8.51

Once you've downloaded the patch you can complete the update:

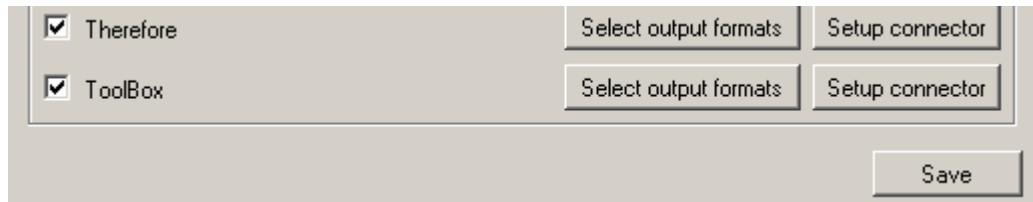
- Go to **C:\Program Files\IRISCapture85\Applic**.
- Delete the **Binary** folder.
- Copy the content of the patch you downloaded to the **Applic** folder.

CONFIGURING THE IRISCAPTURE TO IRISCONNECT CONNECTOR

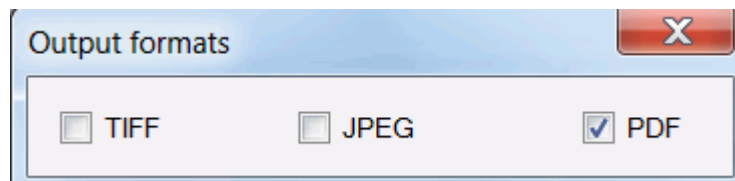
- Go to **C:\Program Files\IRISCapture85\Applic**.
- Double-click **ICPToIRISConnectSetup.exe** to open the connectors' configuration window.
- Log in to the database of your choice.



- Then select your connector and click **Select output formats**.



- Select the output format of your choice.

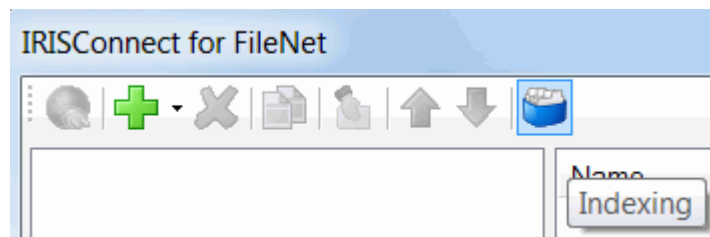


- Return to the connector screen and click **Setup connector**.

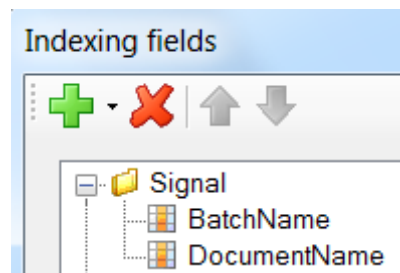
SETTING UP THE CONNECTOR

To set up the connector, you need to take into account the document structure in IRISCapture; you need to define which **indexes** your scanned input documents contain on **batch** level, **document** level and **object** level. This step is required if you want to keep the existing indexes and have them filled out automatically in the ECM system you will be exporting to.

- Click the **indexing** icon.



- As you see, the **Signal** type is created automatically. Do not change anything about this type.



- Then click the down arrow right of the green cross and add new Document types, depending on the structure of the batches you are processing.

Two structures are possible in IRISCapture. You can have:

Batch > Document > Object > Page

or

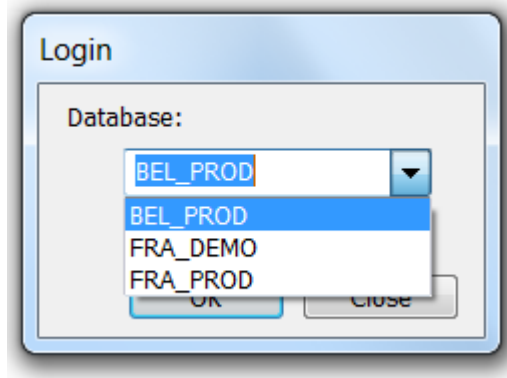
Batch > Object > Page.

Attention: if your batches or documents (which come from your scanning application) do not contain indexes, then it's not necessary to create a type for them at this stage.

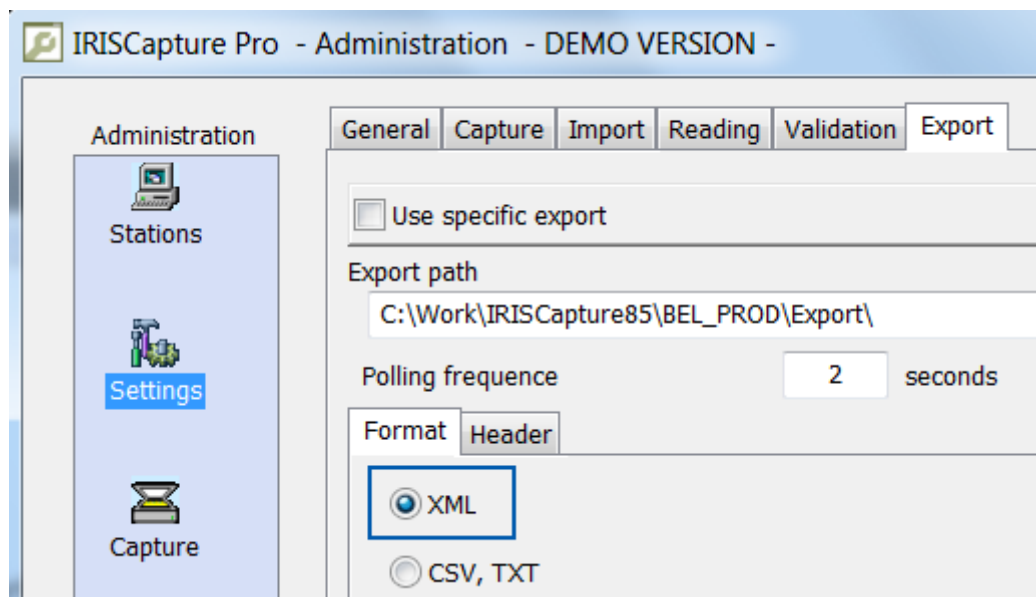
Tip: the easiest way to see the structure of your documents, and to see which indexes you have, is to process a batch and export it with IRISCapture. Once you have exported a batch, you can check its .xml file to check the structure.

To process and export a test batch:

- Go to C:\Program Files\IRISCapture85\Applic.
- Double-click **Util.exe**
- Select the database you want to open.



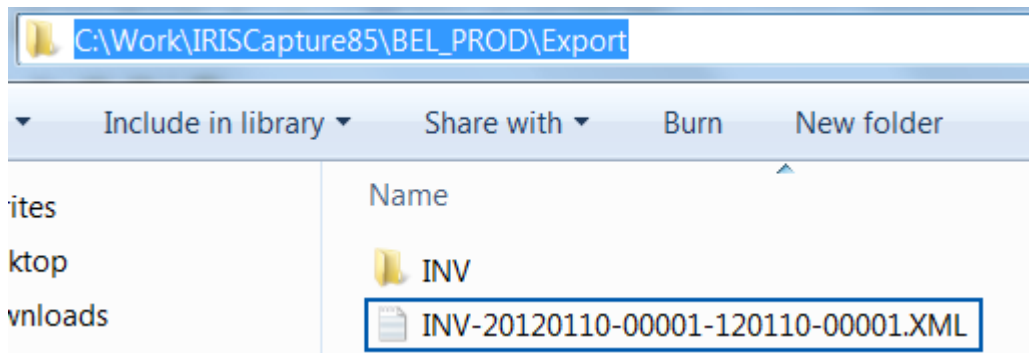
- In the **Administration** window that opens, click **Settings** in the left-hand column, click the **Export** tab and make sure **XML** is selected as format.



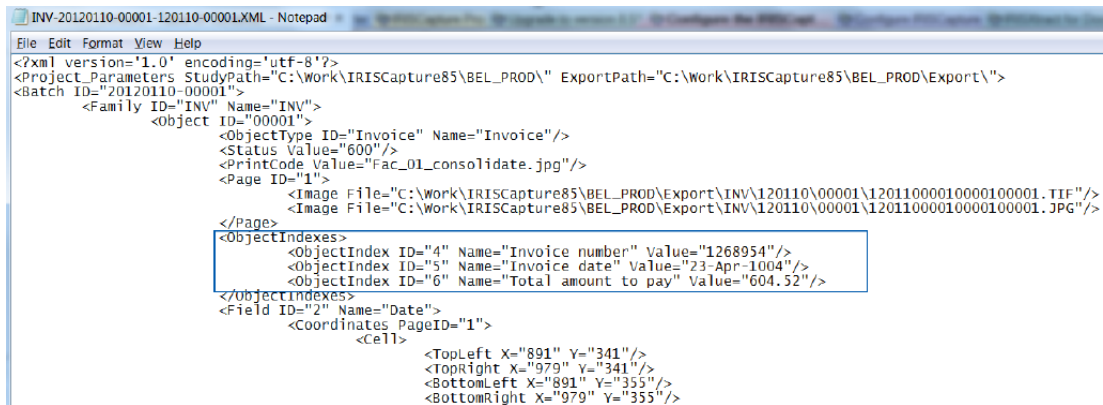
- Now exit the **Administration** module and process a batch in IRISCapture.
- Once you have exported a batch, go to **C:\Work\IRISCapture85\BEL_PROD\Export**.

Note that BEL_PROD is the name of the database. If you are using a different database, then open the **Export** folder in that database.

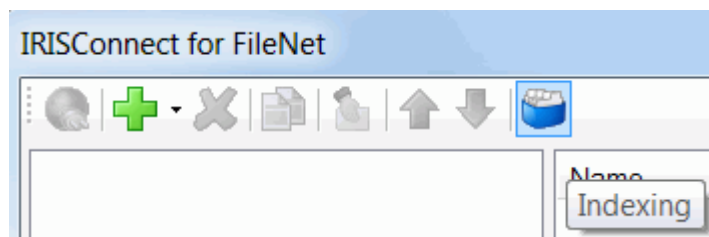
- Then, open the XML file you find there with Notepad.



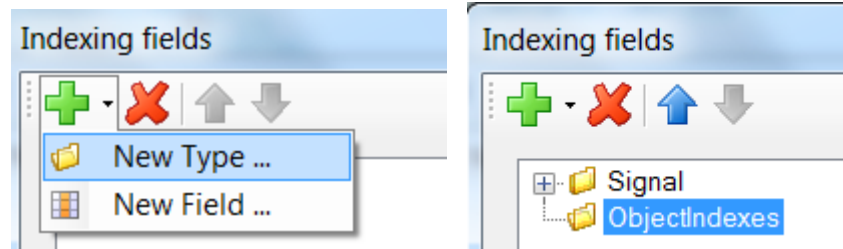
- In this example XML below, you'll notice that there are no indexes on Batch level or Document level. There are only indexes on Object level. This entails it is not necessary to create new types on batch or document level when setting up the connector.



- Now return to the connector inside IRISCapture and click the **Indexing** icon.



- Click the down arrow right of the green cross and click **New Type**. Enter **ObjectIndexes** as name for the type.

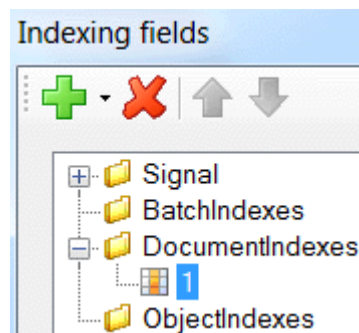


- Click the down arrow again and then click **New Field**. Now select which index fields you want to recreate in your ECM system. For instance "**Invoice number**" and "**Invoice date**"

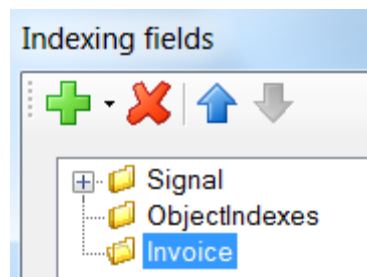
Note that you need to take the **Name** as index field for the ObjectIndexes, and not the ID. (See the XML example image above).

Important note: in case you do have indexes on **Batch** level or **Document** level, and you want create fields, then you need to use their ID instead of their name.

Example: <DocumentIndex ID="1" Name="Document" Value="123456"/>. In this case, you create a new field and name it "1".



- Then add the **Type** of documents you are processing. In IRISCapture for Invoices, this is always "**Invoice**".



- Next, create **New Fields** for the Invoice. These index fields will be recreated in your ECM system.

In a standard configuration of IRISCapture for Invoices, the fields you can add on the Objects level are:

Date

Total without VAT

VAT amount

Total Amount to pay

Invoice Number

Currency

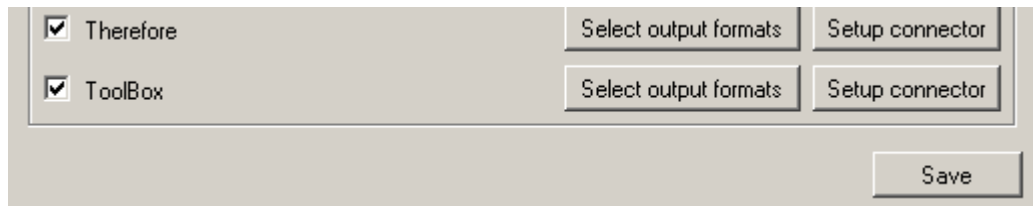
Table sum

Notice that these are also the names, and not the ID's.

- Once you are done creating the types and fields, you can proceed with the rest of the IRISConnect configuration: 1) setting up a connection to your ECM system, 2) defining rule sets, 3) defining rules and doing the field mapping.

Refer to **Part 1** of this guide **Common Configuration of IRISConnect** to learn how to do so.

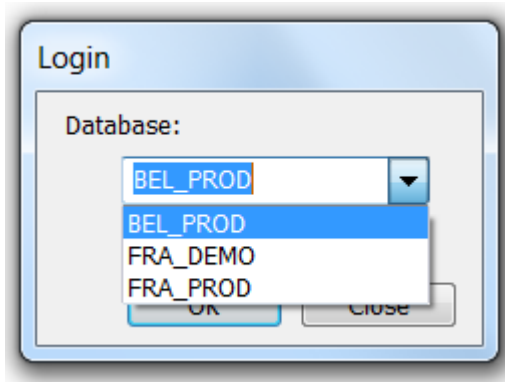
- When you are done, **Save** the configuration.



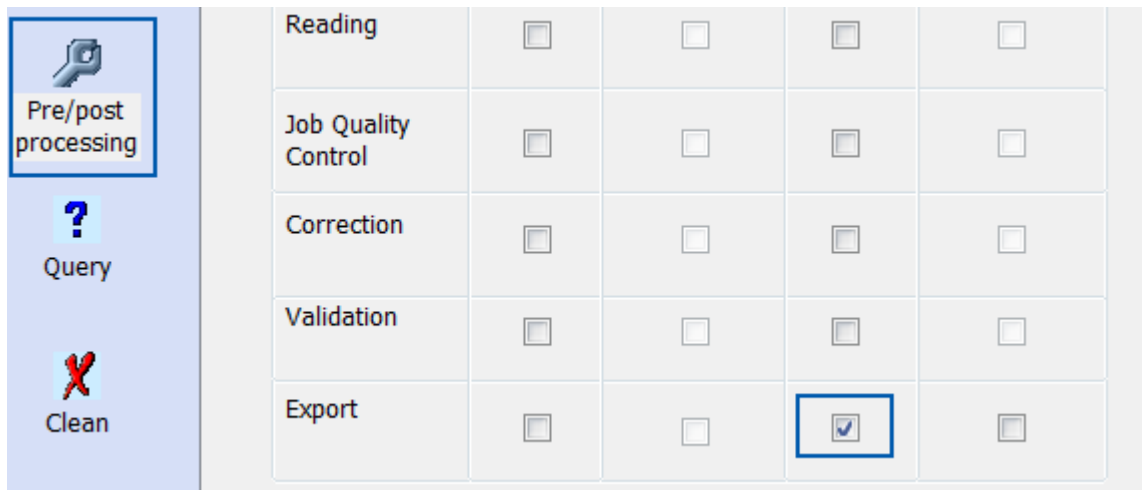
All you have to do now is enable the **Post-Export** in IRISCapture.

ENABLING THE POST-EXPORT IN IRISCAPTURE

- Go to **C:\Program Files\IRISCapture85\Applic.**
- Double-click **Util.exe**
- Select the database you want to open.



- the **Administration** window that opens, click **Pre/Post processing** in the left-hand column.
- Then select the **Export** option indicated below.



Now you can start processing invoices with IRISCapture and send them to the ECM system you configured.

You can also repeat the procedure described above for other databases and other connectors.

Important notes: if you are scanning invoices by means of another application - such as IRIS Powerscan or IRIS Xtract - it is possible that you have already defined different indexes in those applications. In case you want IRISCapture to maintain them, you need to create the necessary Types and Fields inside the connector. In that case you cannot use the default indexes from the XML file.

IRISCONNECT COMBINED WITH IRISXTRACT FOR DOCUMENTS

All connectors that are offered by IRISConnect are integrated in IRISXtract for Documents.

They can be configured in the **Solution Designer** of IRISXtract.

PRELIMINARY NOTES

SYSTEM CONFIGURATION

Make sure you have the following version of IRISXtract for Documents installed on your system:

IRISXtract for Document 3.2.0 containing:

- IRISXtract Solution Designer 3.2.0 Hotfix 1
- IRISXtract Solution Designer Export Plugin 1.0.10
- IRISXtract Solution Package Accounts Payable 5.0.7.0 for Xtract 3.2.0
- Xtract Project Solution Package Accounts Payable 5.5.x

In case you need to update from a previous version, contact I.R.I.S. Technical Support at **activation@iriscorporate.com**.

LICENSING

In order to use IRISConnect from within IRISXtract you need to update the licenses in IRISXtract.

<p>Note: if you do not have an IRISXtract license yet, but want to acquire one, follow the same procedure described below.</p>

There are 2 scenarios: either your license is contained in a local or server dongle (dongle licensing), or in a license file (software licensing).

To obtain an updated license:

In case of a software license:

Send an e-mail to **activation@iriscorporate.com** and provide the following information:

1. Specify what kind of license you need. There are 2 scenarios:
 - a. You have a local or server dongle license that needs updating (**dongle licensing**).
 - b. You have a license file that needs updating (**software license**)
2. Provide Client Information
 - a. Partner Name (if necessary)
 - b. Name of End-user
3. Mention you need a default licensing package (e.g. Solution PackageAccounts Payable default licensing)
4. Specify which special keys must be included in the license:
 - a. Required volume
 - b. Any special engines
 - c. iHQC compression
 - d. Specific connectors

E.g. ExportConnectorTherefore,
ExportConnectorSharePoint
 - e. Non-iHQC PDF output (if necessary)
 - f. Designer and/or Solution Designer (if necessary)

Note: Solution Designer does not need to be activated if it is only used to configure the connectors.

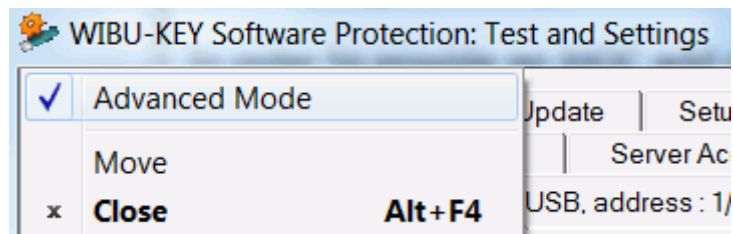
You will receive an updated license file in return.

In case of a dongle license:

The procedure to obtain an updated dongle license is the same as for a software license, except the fact that you also need to include your dongle's .rtc file in your mail to **activation@iriscorporate.com**.

To do so:

- Go to Windows **Control Panel > Hardware and Sound > Wibu Key Tool**.
- Click the Wibu key icon in the left corner of the title bar, then select **Advanced mode**.



- Click the **WIBU-BOX Context** tab.
- Select your dongle in the list.

Note: make sure the dongle(s) is/are plugged in correctly. The **Designer** and **Solution Designer** modules need the dongle to be connected locally

- Click on the **Browse** button to save the RTC file to a location of your choice.
- Now send the RTC file to I.R.I.S. You'll receive an RTU file **and** a license file in return.

Importing the updated dongle license

Once you've received the RTU file from I.R.I.S.:

- Go to Windows **Control Panel > Hardware and Sound > Wibu Key Tool**.
- Click the Wibu key icon in the left corner of the title bar, then select **Advanced mode**.
- Click the **WIBU-BOX Update** tab.
- Select your dongle in the list.
- Click on the **Browse** button to open the RTU file you received by e-mail.

Importing the updated license file

When you've sent all the required information to I.R.I.S Technical Support, they will send you the **updated license file**.

Important notes:

- If you have a **software license**, there are 2 ways to import the updated license file:
 - Via the Setup Wizard, in case you re-install IRISXtract completely
 - Manually in the Production Manager, Solution Designer (if required) and Designer (if required).
- If you have a dongle license, you need to do it manually.

Via the Setup Wizard

- Insert the IRISXtract cd-rom in the cd-rom drive of your computer.
- Run the Setup Wizard.
- You will be prompted to specify the license file.

Manually

In the **Production Manager** module:

- In the **Settings** menu, click **Import license file**.
- Browse for your license file and click **Import**.

Note: you'll need to activate the license, in case of a software license.

In the **Solution Designer** module:

- In the **Tools** menu, click **Import license file**.
- Choose **Yes** and browse for the file to import.
- Then, go the **File** menu and click **Deploy projects to WOM**.

Note: you'll need to activate the license, in case of a software license.

In the **Designer** module:

- In the **Tools** menu, click **Import license file**.
- Choose **Yes** and browse for the file to import.

Note: you'll need to activate the license, in case of a software license.

Activating the license file

After importing the new license file, you will be prompted to enter the **activation code** when you start IRISXtract.

<p>Note: if you are using a dongle license, and the license mode is set up correctly to dongle licensing, you will not be asked to activate.</p>

- Send the identification number you see in the pop-up window to **activation@iriscorporate.com**.

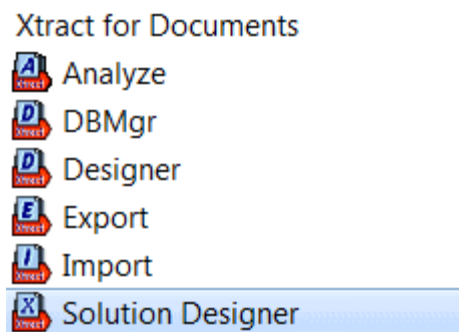
Important note: leave the pop-up window open until you received the activation code.

- Enter the activation code you receive from I.R.I.S. Technical Support.

CONFIGURING CONNECTORS IN IRISXTRACT:

- From the Windows **Start** menu, open the IRISXtract **Solution Designer**.

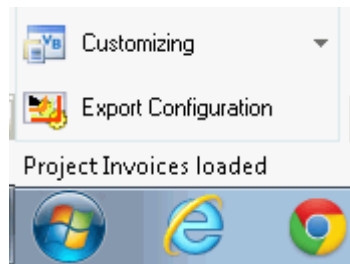
Note: you need have administrator rights to configure the Solution Designer.



- Open the project in which you want to configure the connector(s).



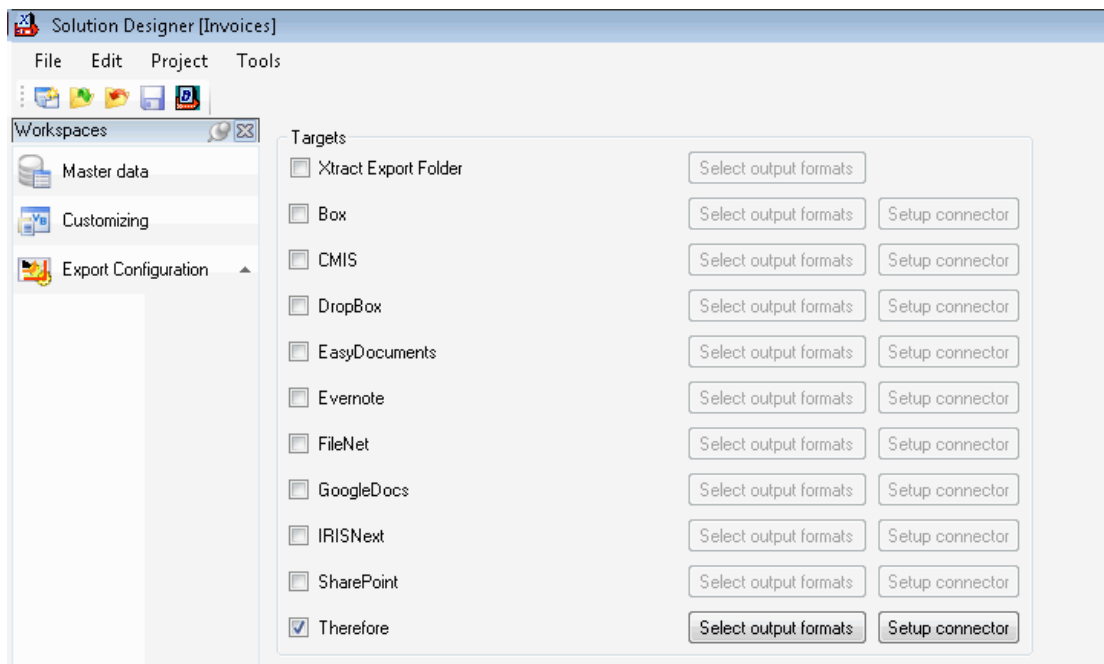
- In the bottom left corner of the screen, click **Export Configuration**.



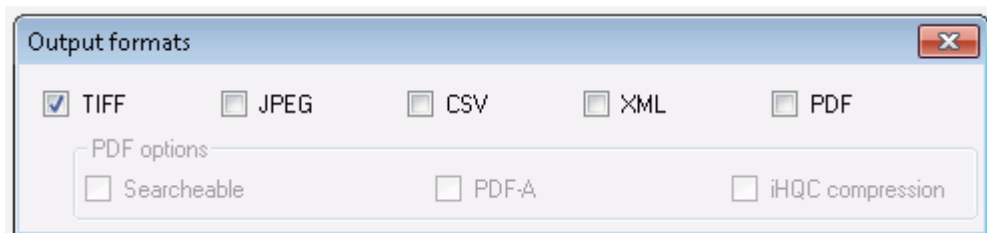
- Select the connector of your choice, then click **Select output formats**.

Note: IRISConnect has to be installed in order to see the connectors. See the section **Installation** for installation details.

If IRISConnect has not been installed, only the **Xtract Export folder** is visible.



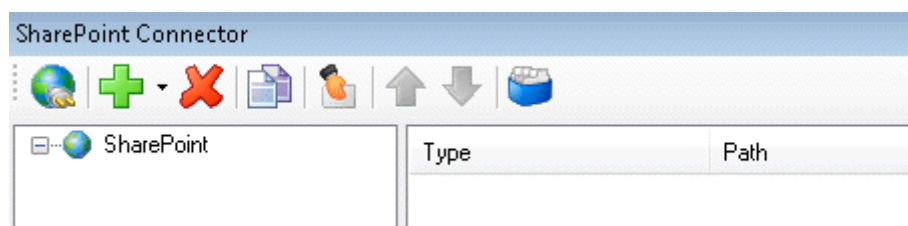
- Select the **output format** of your documents.



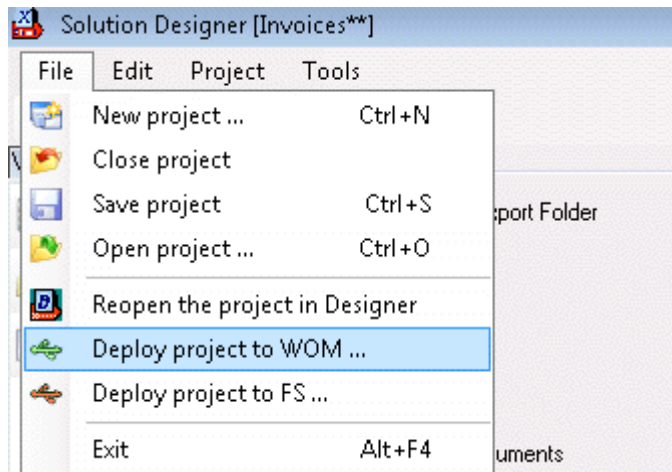
Note: to export PDF documents and iHQC-compressed PDF documents special licenses are required. Contact I.R.I.S. to acquire them: activation@iriscorporate.com.

Note: iHQC is a technology created by I.R.I.S. iHQC is patent-protected. US Patent No. 8,068,684.

- Then exit the **Output formats** dialog box and click **Setup connector**. The IRISConnect interface appears.



- Now proceed with the common configuration of IRISConnect. See **Part 1: Common Configuration of IRISConnect** for more information.
- When you are done configuring the connectors, go to the **File** menu in IRISXtract Solution Designer and click **Deploy project to WOM**.



- Also remember to stop and start the application again in the **System Manager**.

PART 3: PARTICULARITIES ABOUT THE CONNECTORS

Even though the basic configuration is common for all IRISConnect connectors, there are still some particularities to be taken into account.

These particularities are discussed for the ECM systems Therefore, SharePoint, FileNet and IRISNext.

The Cloud systems Box, Dropbox, Evernote and GoogleDocs are bundled in one license package called **IRISConnect for Cloud**. Their particularities are discussed jointly in the section **Cloud systems**.

ODBC and Toolbox are discussed in separate **Technical Notes**.

THEREFORE

THEREFORE FEATURES

IRISConnect is compatible with Therefore 2010 RD 2 and higher.

IRISConnect is also compatible with Therefore Online.

In order to export to Therefore you need to have access to a valid Therefore Server and have a Therefore Client installed and

configured on your computer. Note that the Therefore Client must be compatible with the Therefore server you want to connect to.

Export to Therefore via the IRIS Powerscan Configuration Wizard

In case of a quick, basic configuration through the Configuration Wizard all the documents you process are exported to the same Therefore server and as the same document Category.

- Enter the address of your Therefore Server.
- Enter your **Username** and **Password**.
- The **Tenant** field is only required if you are using Therefore Online.

Therefore Online is a multi-tenant – or multi-owner – system, in which each tenant has his own server.

- Then click **Connect** to establish the connection.
- Finally select to which Therefore **Category** you want to export documents.

The categories that are available on the server you connected to are displayed in the list.

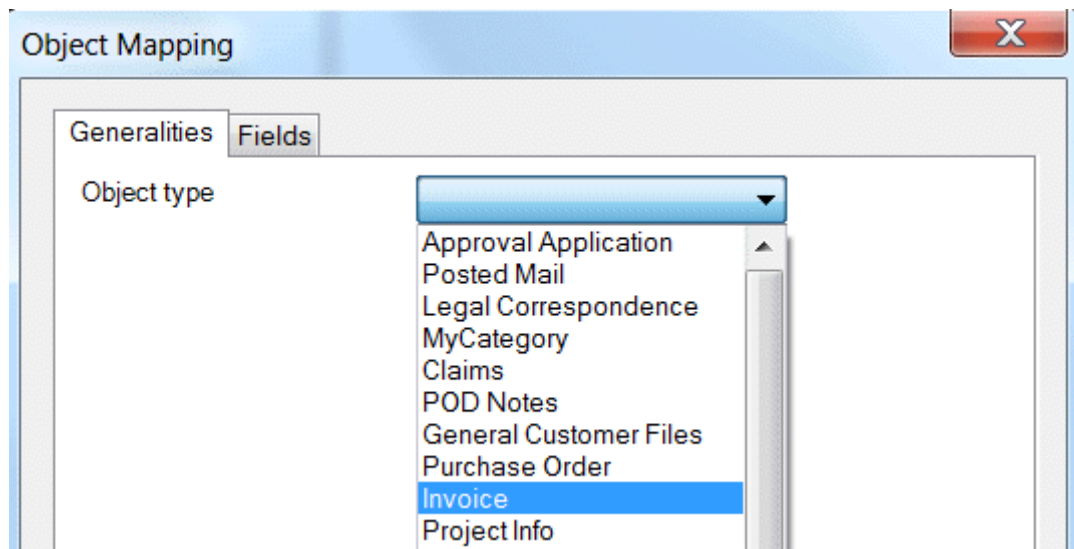


EXPORT TO THEREFORE VIA THE IRISCONNECT INTERFACE

When you are exporting documents via the IRISConnect interface, you can export documents to multiple Therefore servers at the same time, and export documents as different Categories at the same time.

The only thing that differs in terms of configuration in the IRISConnect interface, is that you don't have a **Category** to select when doing **Step 1; Establishing the connection**.

Selecting a category is done during **Step 3; Creating Rules**.



SHAREPOINT

SHAREPOINT FEATURES

IRISConnect is compatible with Microsoft SharePoint 2007 and higher.

IRISConnect is also compatible with Microsoft SharePoint online.

In order to export to SharePoint you need to have access to a valid SharePoint Server.

EXPORT TO SHAREPOINT VIA THE IRISPOWERSCAN CONFIGURATION WIZARD

In case of a quick, basic configuration through the Configuration Wizard all the documents you process are exported to the same SharePoint Server, Database and Document Category.

- Enter the address of your **SharePoint** server.
- Enter your **Username** and **Password**.

This is optional and depends on your SharePoint server.

- Click **Connect** to establish the connection.
- When the connection is successful, the **Database** list becomes available.
- Select the **Database** to which you want to export your documents.

Only the databases that are available in your SharePoint system are listed.

- **Browse** for the exact **Folder** to which you want to export your documents.
- In the **Category** list, select **Folder** or **Document**. Your documents can either be exported as folders or documents.

IRISConnect for SharePoint

1. Connect to the server

Server: YourSharePoint

User name:

Password:

Database: Doc

Folder: /dgi


Category: Document
Document
Folder

EXPORT TO SHAREPOINT VIA THE IRISCONNECT INTERFACE

If you want to export **different** document types to **different** SharePoint servers, then continue with an advanced configuration via the IRISConnect interface. In this case, you can also export documents to folders that do not exist yet and create them at the same time.

First access the IRISConnect interface, then go through the following steps:

Step 1: Establish the connection

- Click the down arrow right of the green cross  and click **Connection**.
- Enter a **name** for your connection.
- Enter the URL in the **Server** field.
- Enter your **Username** and **Password**.

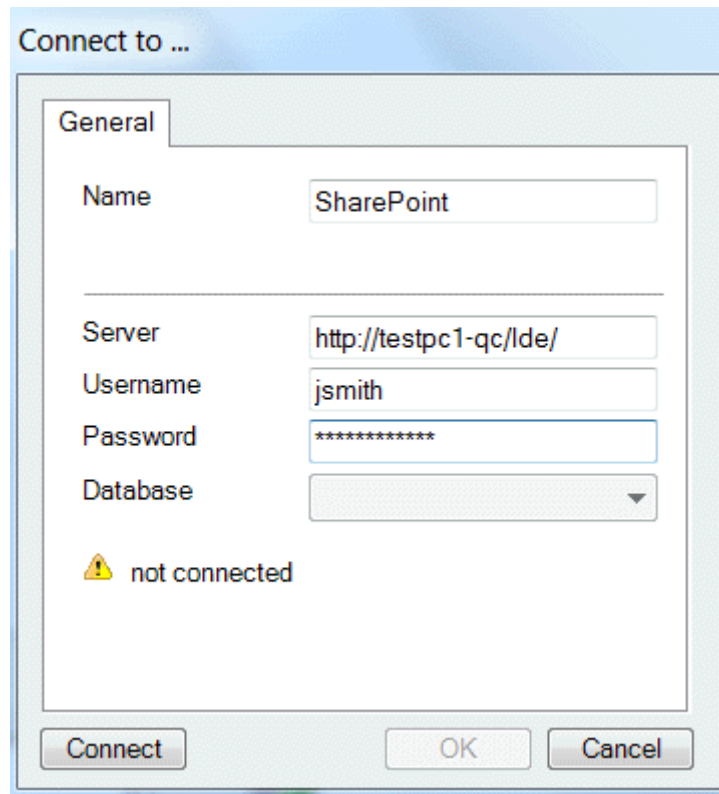
This is optional and depends on your SharePoint server.

- Click **Connect** to establish the connection.

If the connection was successful, the "not connected" warning disappears.

- Then select the **Database** to connect to and click **Connect** again.

Again, if the connection was successful, the "not connected" warning disappears.



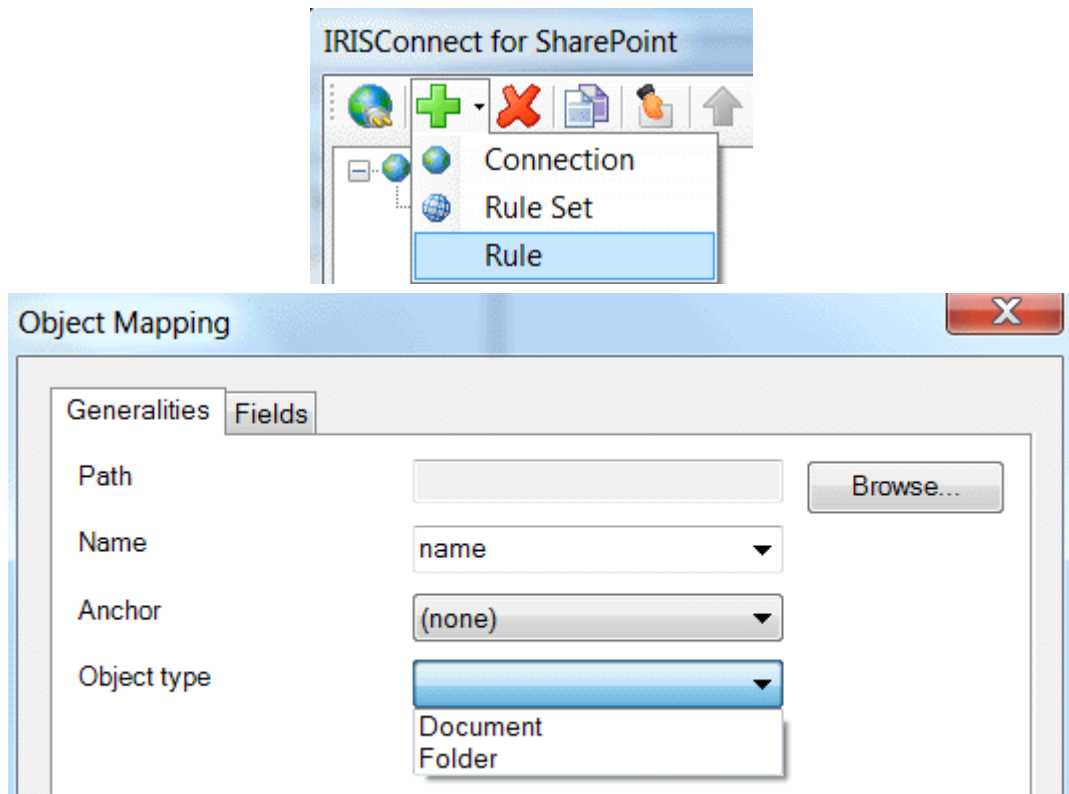
Steps 2 and 3: Define the rule sets and rules

When exporting to SharePoint multiple export scenarios are possible. You can for instance export your documents to an existing folder on the SharePoint server, or create a new folder and simultaneously export your document to the newly created folder. You can do this by creating specific rules.

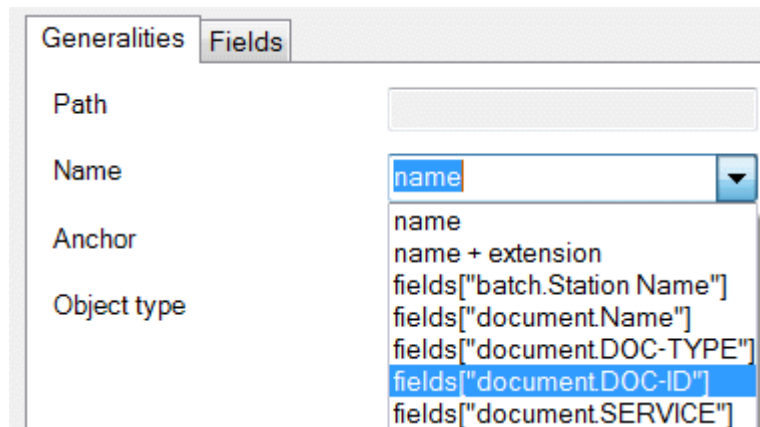
Export scenarios

1. Export your documents to an existing folder

- In this case you can use a default Rule Set.
- Then add a **Rule** to specify the exact folder to which the documents must be exported.



- Browse for the **path** of the folder.
- Select how the exported document will be **named**. Note that the content of index fields can be used as document name.



- Select an **Anchor** in case you want to export your documents to a fixed object in SharePoint.
- Then, select **Document** as **Object type**.

2. Create a new folder and export your documents to that folder

When you want to create a new folder on your SharePoint server and export your documents simultaneously to that new folder, you need to create 2 rules: 1 that applies to the folder and 1 that applies to the documents.

- In this case you can use a default Rule Set.
- Then, add the first rule to create a folder:
 - Click **Browse** to select in which location you want to create a folder.
 - Select **folder** as **Object type**.
 - Click **OK** to return to the IRISConnect main screen.
- Then, add a second rule to export your documents to the new folder:
 - On the **Generalities** tab, leave the **Path** field empty. This way, IRISConnect uses the path you defined in the previous rule.
 - Select **Document** as **Object type**.
- Click **OK** to finish the configuration.

IRISNEXT

IRISNEXT FEATURES

IRISConnect is compatible with IRISNext 7.2 and higher.

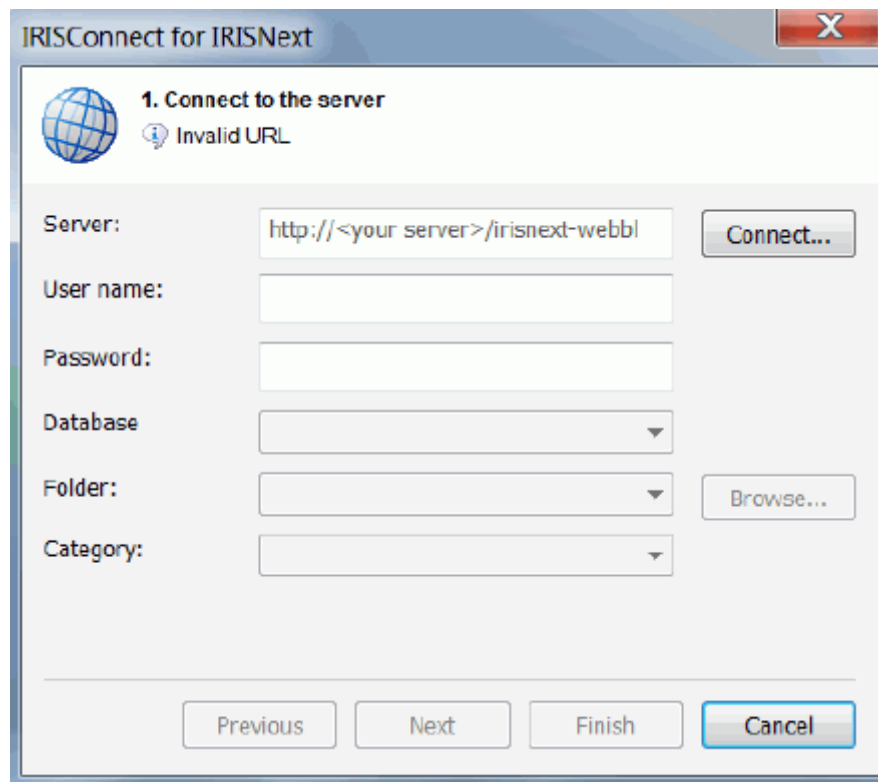
In order to export to IRISNext you need to have access to a valid IRISNext Server.

IRISNext is an ECM system with a strict object hierarchy. Make sure you are aware of the hierarchy that is used in your IRISNext system. After all, the same structure must be respected when configuring IRISConnect.

EXPORT TO IRISNEXT VIA THE IRISPOWERSCAN CONFIGURATION WIZARD

In case of a quick, basic configuration through the Configuration Wizard all the documents you process are exported to the same server, database, folder and category.

- Enter the address of your **IRISNext** server.
- Enter your **Username** and **Password**.
- Then click **Connect** to establish the connection.
- Select the **Database** to which you want to export documents.
- If required, select the **subfolder** of the database to which the documents must be exported.
- Then select as which **Category** the documents must be exported.




- Click **Next** if you want to go to step 2. The next steps are the same for all the connectors and are discussed in **Part 2 > IRIS Powerscan > Configuration Wizards**.

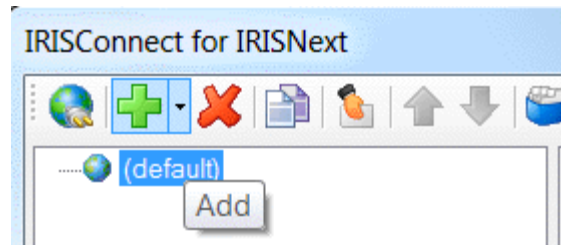
EXPORT TO IRISNEXT VIA THE IRISCONNECT INTERFACE

If you want to export **different** document types to **different** IRISNext servers, then continue with an advanced configuration via the IRISConnect interface. In this case, you can also export documents to folders that do not exist yet and create them at the same time.

First access the IRISConnect interface, then go through the following steps:

Step 1: Establish the connection

- Click the down arrow right of the green cross  and click **Connection**.

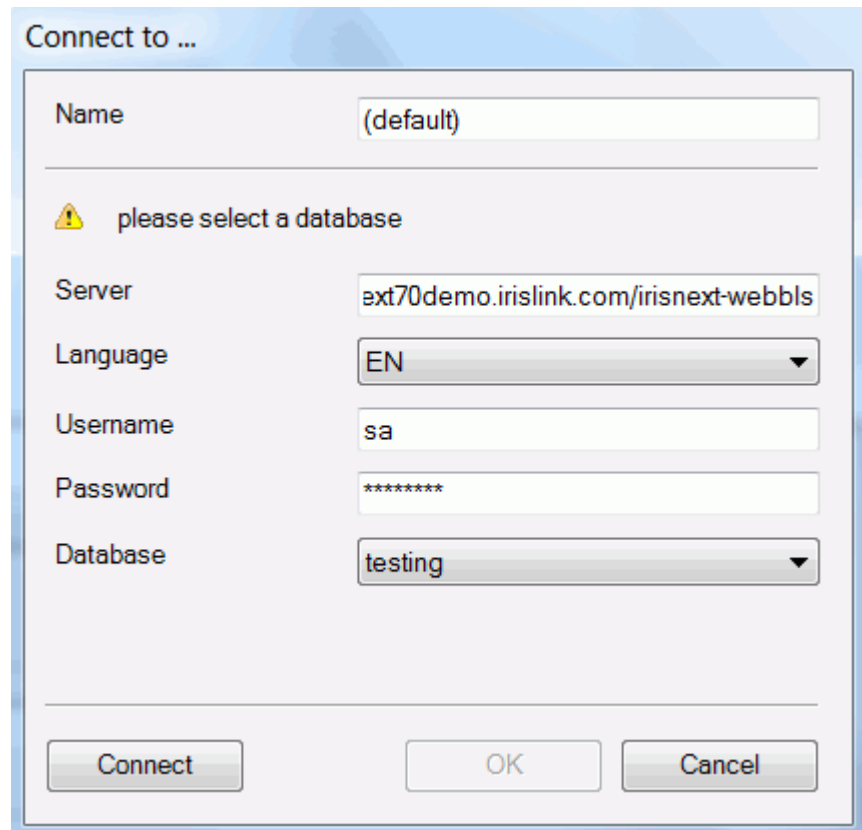


- Enter a **name** for your connection.
- Enter the URL in the **Server** field.
- Enter your **Username** and **Password**.
- Select the language of your system.
- Click **Connect** to establish the connection.

If the connection was successful, the "not connected" warning disappears.

- Select a **Database** inside IRISNext, then click **Connect** again.

The "not connected" warning disappears if the connection was successful.



Steps 2 and 3: Define the rule sets and rules

When exporting to IRISNext multiple export scenarios are possible. You can for instance export documents to a cabinet in which there aren't any folders yet. In that case, you must configure a rule that creates a folder inside the cabinet, and another rule that exports your documents to that folder.

Export scenario: create a new folder inside a cabinet and export your documents to that folder

- In this case you can use a default Rule Set.
- Then, add the first rule to create a folder:
 - Click **Browse** to select in which Cabinet you want to create a folder.
 - Do not select an Anchor.

- Select **Folder** as **Object type**.

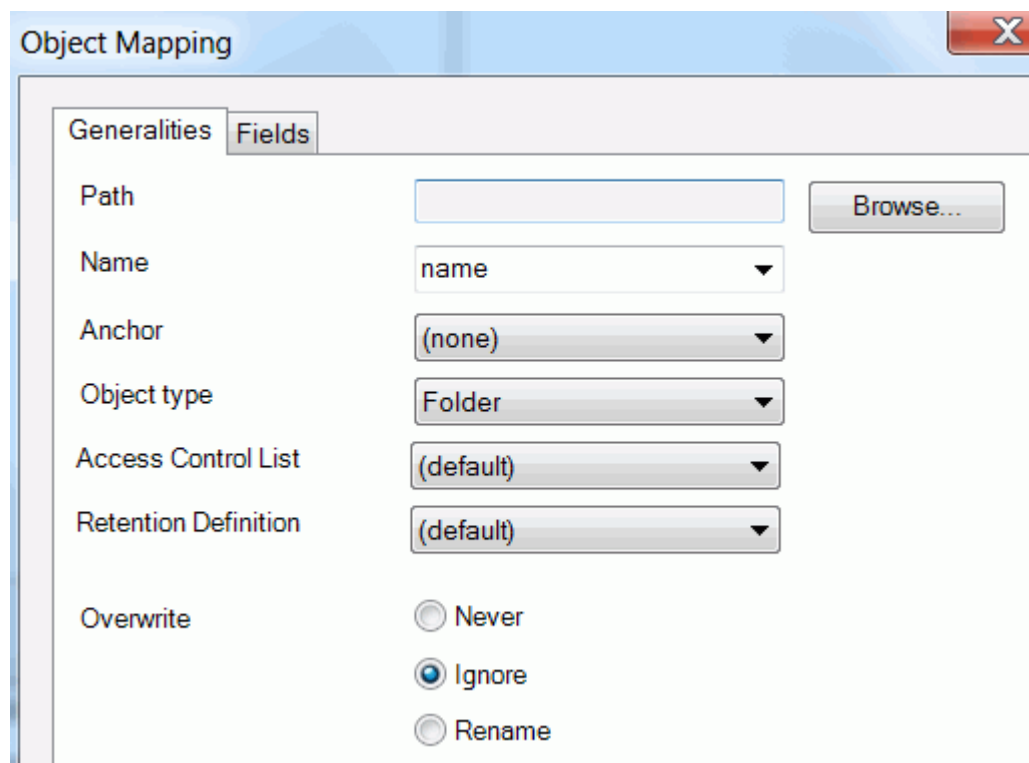
- Determine the **Access Control**.

These settings determine users' access rights to the exported object.

- Determine the **Retention Definition**.

These settings determine how long the object will be stored.

For more information about the latter two options, refer to the **IRISNext Documentation**.



The screenshot shows the 'Object Mapping' dialog box with the 'Fields' tab selected. The dialog has two tabs: 'Generalities' and 'Fields'. The 'Fields' tab contains the following settings:

Path	<input type="text"/>	<input type="button" value="Browse..."/>
Name	<input type="text" value="name"/>	▼
Anchor	<input type="text" value="(none)"/>	▼
Object type	<input type="text" value="Folder"/>	▼
Access Control List	<input type="text" value="(default)"/>	▼
Retention Definition	<input type="text" value="(default)"/>	▼
Overwrite	<input type="radio"/> Never <input checked="" type="radio"/> Ignore <input type="radio"/> Rename	

- Click **OK** to return to the IRISConnect main screen.

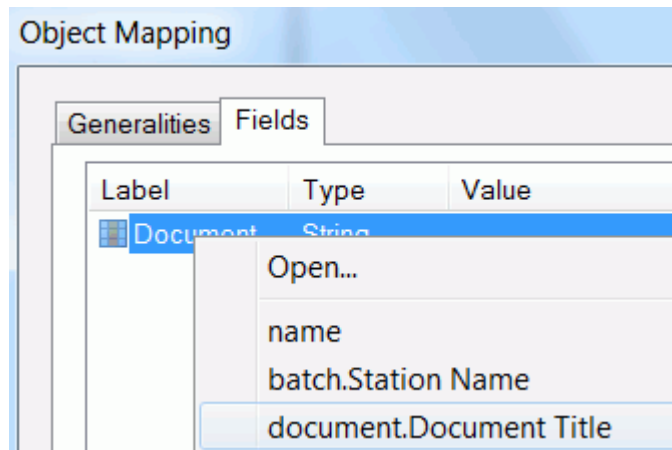
- Then add a second rule to export your documents to the new folder:

- On the **Generalities** tab, leave the **Path** field empty. This way, IRISConnect uses the path you defined in the previous rule.
- Select **document** as **Object type**.
- Click **OK** to finish the configuration.

 **Important notes:**

If you used the IRIS Powerscan Configuration Wizard, your IRIS Powerscan indexes have been mapped to your IRISNext indexes. To check the mapping, click the **Fields** tab within a rule configuration. Depending on the object type you selected, the corresponding IRISNext indexes are displayed.

If necessary, you can modify them. To do so, right-click an IRISNext index (label), and select which other IRIS Powerscan index you want to map it to.



FILENET

FILENET FEATURES

IRISConnect is compatible with FileNet P8 and higher.

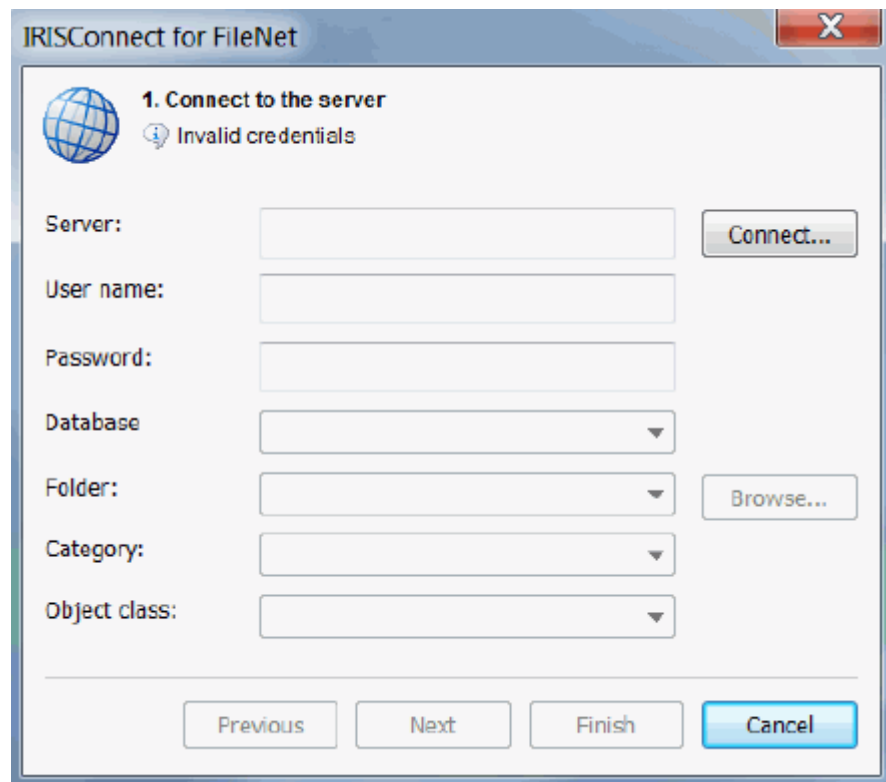
In order to export to FileNet you need to have access to a valid FileNet Server.

In addition, Microsoft Web Services Enhancements 3.0 must be installed. To install it, run **wse30.msi** in the **Tools** folder of the IRISConnect cd-rom.

EXPORT TO FILENET VIA THE IRISPOWERSCAN CONFIGURATION WIZARD

In case of a quick, basic configuration through the Configuration Wizard, all the documents you process are exported to the same server, database, folder, category and object class.

- Enter the address of the **FileNet** server.
- Enter your **User name** and **Password**.
- Then click **Connect** to establish the connection.
- Select the **Database** to which you want to export documents.
- If required, select the **subfolder** of the database to which the documents must be exported.
- Then select as which **Category** the documents must be exported.
- Finally select the **Object** class.




- Click **Next** if you want to go to step 2 of the wizard. The next steps are the same for all connectors and are discussed in **Part 2 > IRIS Powerscan > Configuration Wizards**.

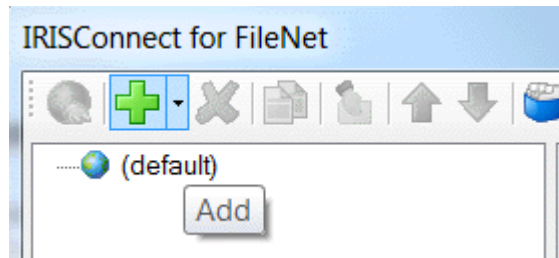
EXPORT TO FILENET VIA THE IRISCONNECT INTERFACE

If you want to export **different** document types to **different** IRISNext servers or subfolders, then continue with an advanced configuration via the IRISConnect interface. In this case, you can also export documents to folders that do not exist yet and create them at the same time.

First access the IRISConnect interface, then go through the following steps:

Step 1: Establish the connection

- Click the down arrow right of the green cross  and click **Connection**.

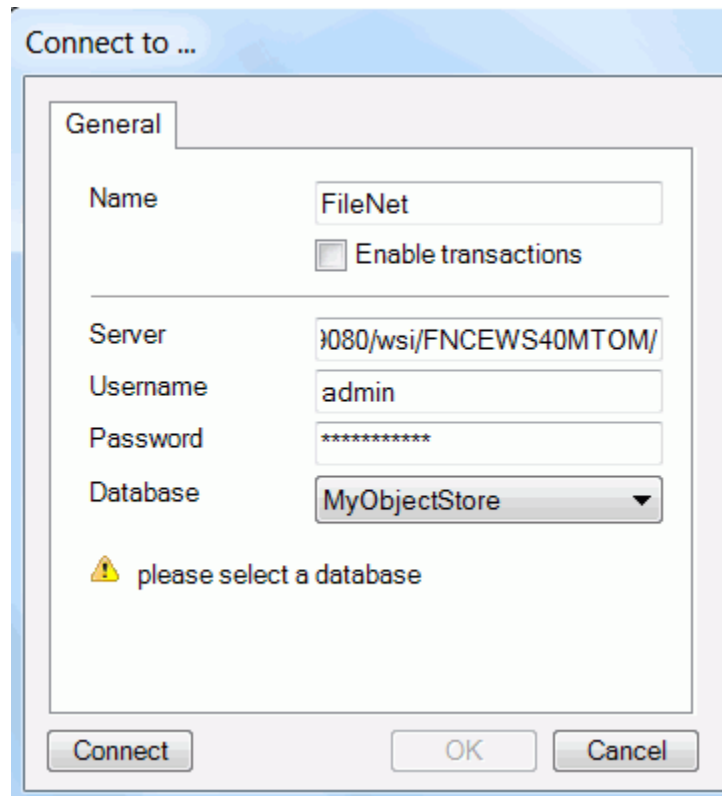


- Enter a **name** for your connection.
- Enter the URL in the **Server** field.
- Then enter your **Username** and **Password**.
- Click **Connect** to establish the connection.

If the connection was successful, the "not connected" warning disappears.

- Then select the **Database** to connect to and click **Connect** again.

Again, if the connection was successful, the "not connected" warning disappears.



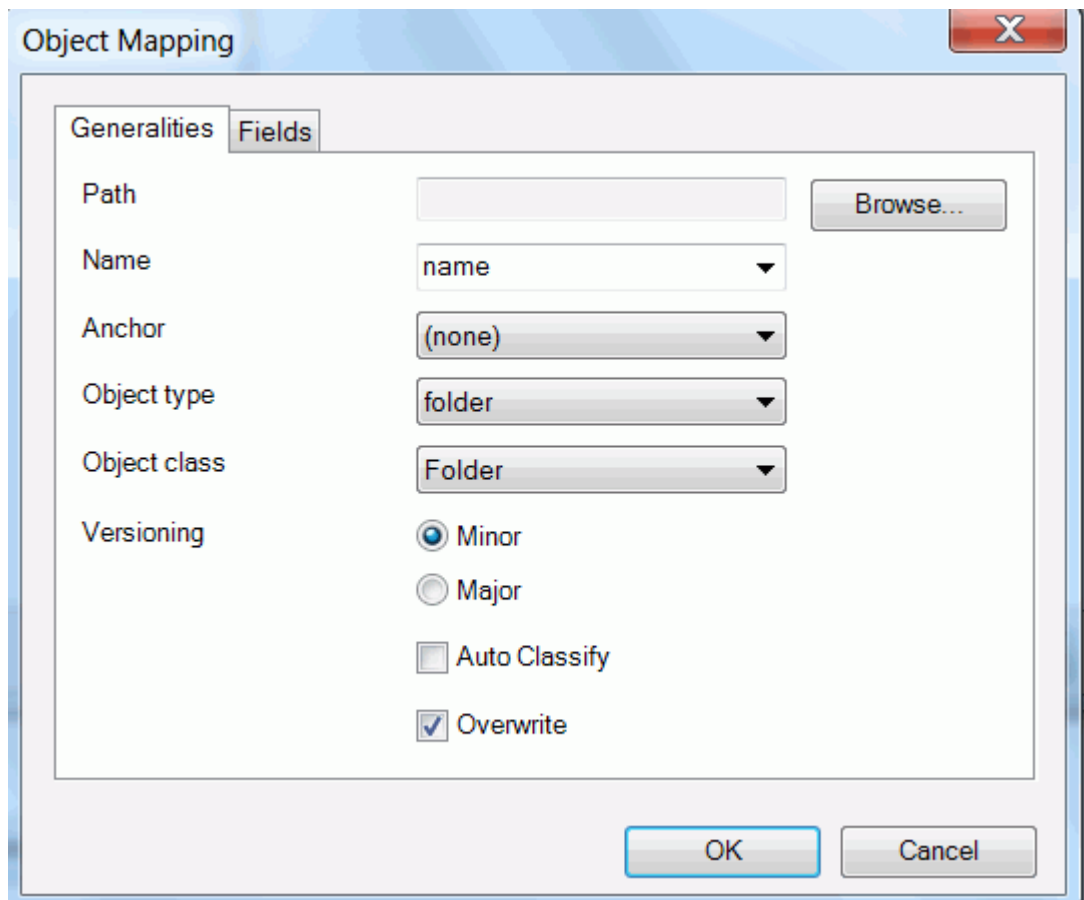
Steps 2 and 3: Define the rule sets and rules

When exporting to FileNet multiple export scenarios are possible. You can for instance export your documents to an existing folder or create a new folder inside a FileNet database and export your documents to that folder. You can do this by creating specific rules.

Export scenarios

1. Export your documents to an existing folder

- In this case you can use a default Rule Set.
- Then add a **Rule** to specify the exact folder to which the documents must be exported.

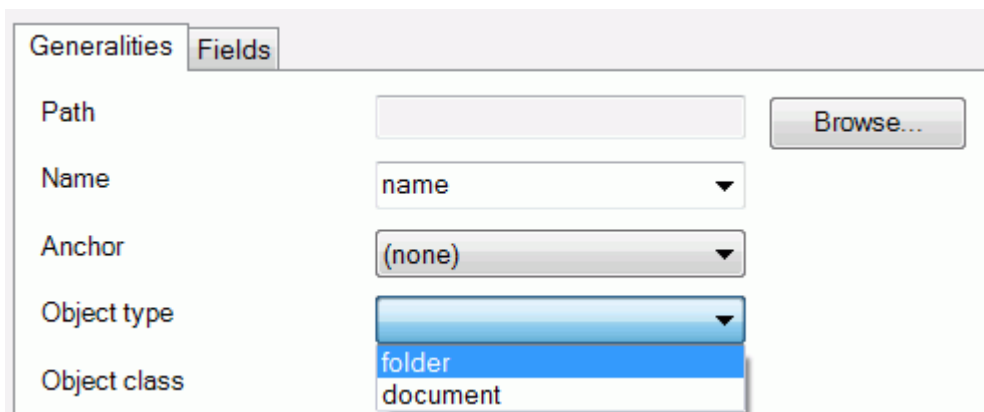


- Click **Browse** to select to which folder you want to export documents..
- Do not select an Anchor.
- Select **document** as **Object type**.
- Also select document as Object class.

2. Create a new folder and export your documents to that folder

When you want to create a new folder inside a FileNet database and export your documents simultaneously to that new folder, you need to create 2 rules: 1 rule that applies to the folder, and 1 rule that applies to the documents.

- In this case you can still use a default Rule Set.
- Then, add the first rule to create a folder:
 - Click **Browse** to select in which location you want to create a folder.
 - Select **folder** as **Object type**.
 - Also select **folder** as **Object class**.



The screenshot shows a configuration window with two tabs: 'Generalities' and 'Fields'. The 'Fields' tab is active. It contains the following fields:

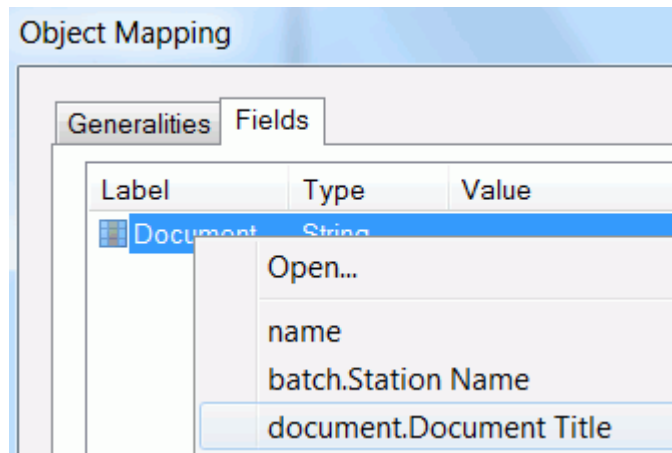
- Path:** An empty text input field with a 'Browse...' button to its right.
- Name:** A dropdown menu with 'name' selected.
- Anchor:** A dropdown menu with '(none)' selected.
- Object type:** A dropdown menu with 'folder' selected and the list open.
- Object class:** A dropdown menu with 'document' selected.

- Click **OK** to return to the IRISConnect main screen.
- Then, add a second rule to export your documents to the new folder:
 - On the **Generalities** tab, leave the **Path** field empty. This way, IRISConnect uses the path you defined in the previous rule.
 - Select **document** as **Object type**.
 - Then select as what kind of the document you want export them in the **Object class** field.
 - Click **OK** to finish the configuration.

Important Notes

If you used the IRIS Powerscan Configuration Wizard, your IRIS Powerscan indexes have been mapped to your FileNet indexes. To check the mapping, click the **Fields** tab within a rule configuration. Depending on the object class you selected, the corresponding FileNet indexes are displayed.

If necessary, you can modify them. To do so, right-click an FileNet index (label), and select which other IRIS Powerscan index you want to map it to.



CMIS

IRISConnect is compatible with CMIS 1.0 and higher. More information about CMIS will be available in a separate Technical Note.

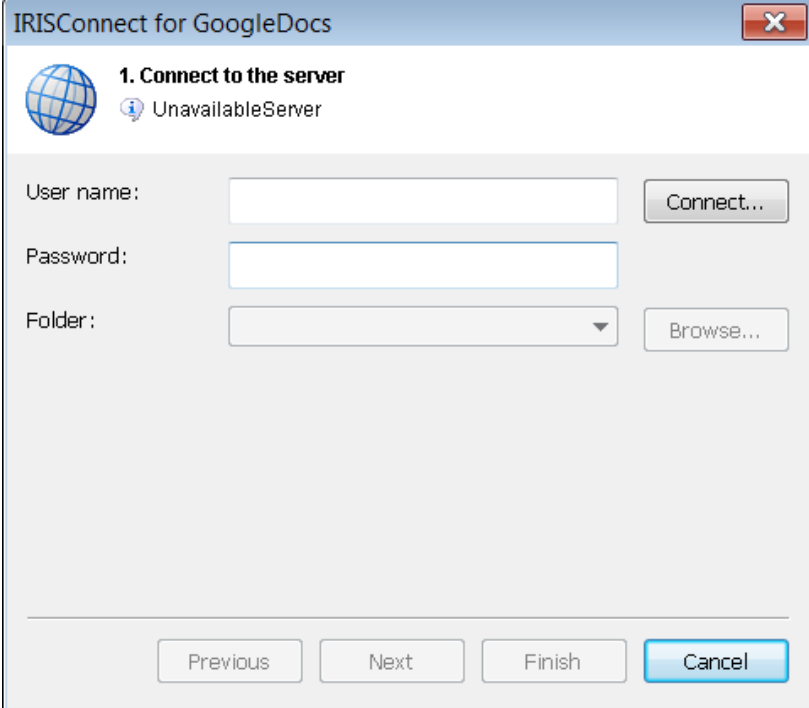
CLOUD SYSTEMS

IRISConnect is compatible with the Cloud systems Box, Dropbox, Evernote and GoogleDocs.

EXPORT TO THE CLOUD VIA THE IRISPOWERSCAN CONFIGURATION WIZARD

In case of a quick, basic configuration through the Configuration Wizard all the documents you process are exported to the same account and to the same folder.

- Enter your **username** and **password**.
- If necessary, indicate to which folder your documents must be exported.



IRISConnect for GoogleDocs

1. Connect to the server

UnavailableServer

User name:

Password:

Folder:

- Click **Next** if you want to go to step 2 of the wizard. The next steps are the same for all connectors and are discussed in **Part 2 > IRIS Powerscan > Configuration Wizards**.


Important note about Step 2 of the Wizard: when connecting to the Cloud systems mentioned above you will not see any documents fields in step 2 **Define document fields**. The reason for this is the fact that these Cloud systems do not commonly use an indexing system. As a result, any indexes you apply in IRIS Powerscan will not be exported to your Cloud systems.

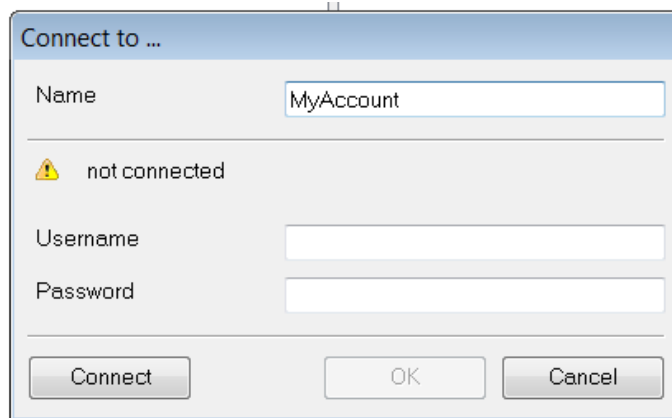
EXPORT TO THE CLOUD VIA THE IRISCONNECT INTERFACE

If you want to export **different** document types to **different** folders, or to different collections in the case of Evernote and GoogleDocs, then continue with an advanced configuration via the IRISConnect interface. In this case, you can also export documents to folders that do not exist yet and create them at the same time.

First access the IRISConnect interface, then go through the following steps:

Step 1: Establish the connection

- Click the down arrow right of the green cross  and click **Connection**.



- Enter a **name** for your connection.
- Then enter your **Username** and **Password**.
- Click **Connect** to establish the connection.

If the connection was successful, the "not connected" warning disappears.

Steps 2 and 3: Define the rule sets and rules

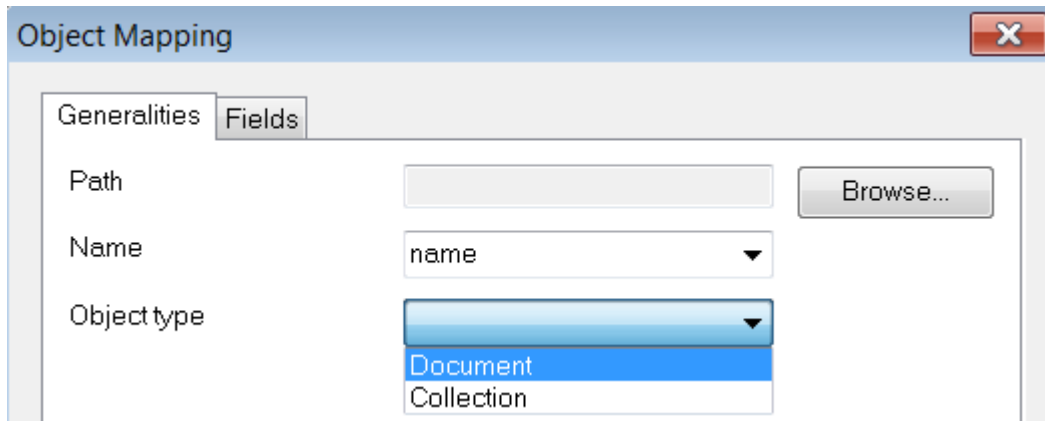
When exporting to the Cloud multiple export scenarios are possible. You can for instance export your documents to an existing folder or create a new folder/collection in your account and export your documents to that folder/collection. You can do this by creating specific rules.

Export scenarios

1. Export your documents to an existing folder/collection

- In this case you can use a default Rule Set.
- Then add a **Rule** to specify the exact folder to which the documents must be exported.

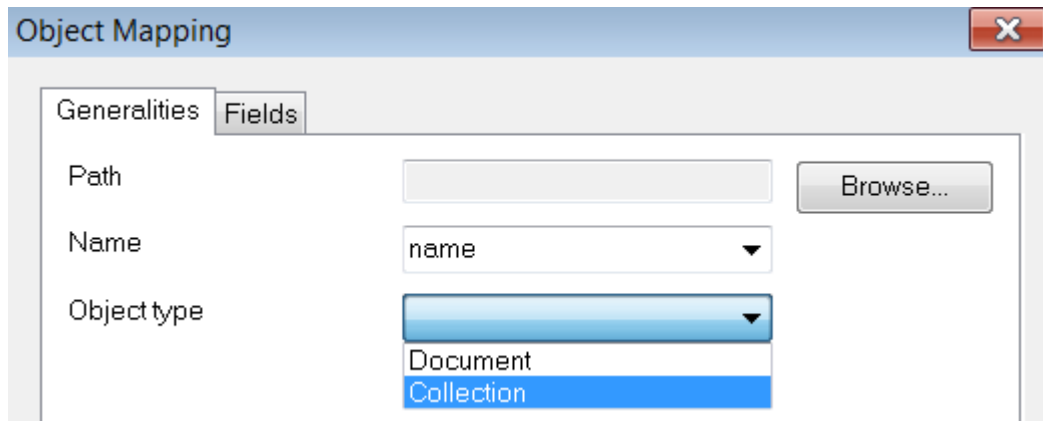
- Click **Browse** to select to which folder you want to export documents.
- Select **document** as **Object type**.



2. Create a new folder and export your documents to that folder/collection

When you want to create a new folder/collection inside a Cloud account and export your documents simultaneously to that new folder, you need to create 2 rules: 1 rule that applies to the folder/collection, and 1 rule that applies to the documents.

- In this case you can still use a default Rule Set.
- Then, add the first rule to create a folder/collection:
 - Click **Browse** to select in which location you want to create a folder.
 - Select **folder/collection** as **Object type**.



- Click **OK** to return to the IRISConnect main screen.
- Then, add a second rule to export your documents to the new folder/collection:
 - On the **Generalities** tab, leave the **Path** field empty. This way, IRISConnect uses the path you defined in the previous rule.
 - Select **document** as **Object type**.
 - Then select as what kind of the document you want export them in the **Object class** field.
 - Click **OK** to finish the configuration.