



KOFAX

# **Ricochet™ Coversheet**

## **System Administrator's Guide**

10300281-000  
Revision A

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An attempt has been made to state all allowable values where applicable throughout this manual. Any values or parameters that the customer uses beyond those stated may have unpredictable results.

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# How to Use This Guide

This *System Administrator's Guide* contains instructions for installing Ricochet Coversheet, as well as an overview of the product and a description of its user interface. It is intended to be used by system administrators who are installing Ricochet Coversheet at their central Ascent Capture site, and supporting remote Ricochet Coversheet operators.

This guide assumes that you have a thorough understanding of Internet technologies and Web servers; Microsoft Internet Server and its components; your network and Web Server configuration; the browsers that your remote operators will use; and Ascent Capture.

## How This Guide is Organized

This guide is divided into the following chapters and appendices:

**Chapter 1 – Overview**, offers an overview of the Ricochet Coversheet product. It includes a general description of the components provided with the product, and a list of the product's key features.

**Chapter 2 – Installing Ricochet Coversheet**, explains how to install Ricochet Coversheet at your central site. It also lists the minimum and recommended operating requirements for the product.

**Chapter 3 – Image Importer**, describes how the Image Importer component works, and gives an overview of its user interface. It also includes tips for creating batch classes and document classes for use with Ricochet Coversheet.

**Chapter 4 – Web Pages**, describes how your remote operators access the Ricochet Coversheet Web pages, and create packages to send to your central site. It includes a description of how the Web pages work, an overview of the user interface, and details about common tasks.

**Chapter 5 – Log Files**, provides a description of the log files generated by Ricochet Coversheet.

**Appendix A – Troubleshooting Tips**, offers solutions and tips that may prove useful should you encounter problems. It also describes the Error Files folder where packages that cannot be imported into Ascent Capture are moved.

**Appendix B – Kofax Technical Support**, lists the technical support options provided by Kofax Image Products.

**Appendix C – Glossary**, provides a list of terms used in this guide and the online help available from the Image Importer and the Ricochet Coversheet Web pages.

## Related Documentation

Ricochet Coversheet provides the following printed and online documentation:

- This *System Administrator's Guide* provides instructions for installing, configuring, and using Ricochet Coversheet.
- Online help for the Image Importer provides online assistance for the system administrator at the central site.
- Online help for the Ricochet Coversheet Web pages provides online assistance for your remote operators.
- Late-breaking product information (if any) is available from release notes.

For more information about Ascent Capture, refer to:

- The *Getting Started with Ascent Capture* guide and release notes provided with Ascent Capture
- The online help available from any Ascent Capture module and your Ascent Capture program group

For more information about Microsoft products, including Microsoft Internet Information Server (IIS), refer to your Microsoft documentation.

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**Tip** Ascent and Ricochet documentation is available in PDF format from the Kofax Technical Support Web pages. To access the documentation, visit the Kofax Web site at [www.kofax.com](http://www.kofax.com) and go the Technical Support page. Click the link for your product, and select Online Manuals. Updates to the Ascent and Ricochet documentation (if any) are posted to this site. The information provided in the PDF files may supercede the documentation that came with your product.

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# Overview

## Introduction

Ricochet Coversheet is an easy-to-use utility that allows documents to be pre-indexed at your remote sites, and delivered to the Ascent Capture workflow at your central site via a Multi-Function Peripheral (MFP) or other scanning device. Your remote operators need only complete a Web-based form to provide the appropriate index values for a document, print a special-purpose cover sheet, and then scan the cover sheet and the document. Ricochet Coversheet “captures” the output from the scanning device, and automatically imports the scanned document and index values into the Ascent Capture workflow at your central site.

Installing Ricochet Coversheet is simple. The software is installed and configured on a Web server at your central site —no client software is installed. Remote operators need only point their browsers to a specific Web address to access the Ricochet Coversheet Web pages. The Web pages allow the remote operator to select from a list of centrally administered Ascent Capture batch classes, enter the index values for a document, and create the special-purpose cover sheet. Then, the operator can scan the cover sheet and document with their scanning device to create a document “package” to send to the central site.

This chapter introduces the components provided with Ricochet Coversheet, and includes a list of key features. The rest of this guide describes the components in more detail, and explains how to use them in your Ascent Capture environment.

## Components

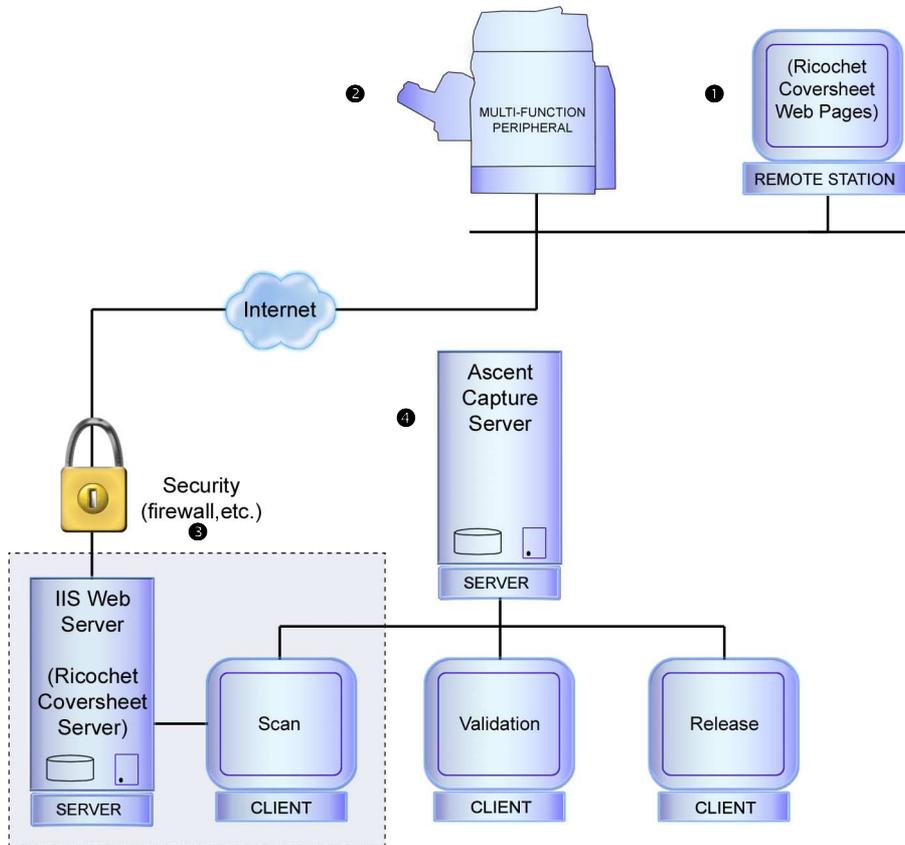
Ricochet Coversheet provides the following components, all of which must be installed on your IIS Web server at your central site.

- **Ricochet Coversheet Server** administers the Web pages available to your remote operators. The Server also provides the capability to create special-purpose cover sheets, generate bar codes for the cover sheets, and more.
- **Ricochet Coversheet Web pages** include a set of Active Server Pages that allow your remote operators to:
  - ✓ Select the type of document they want to process
  - ✓ Enter index values for the document
  - ✓ Create a special-purpose cover sheet to be scanned with the document

The Web pages run from the location of your Ricochet Coversheet Server. They contain no ActiveX objects or applets, and require no special plug-ins for viewing.

- **Ricochet Coversheet Image Importer** is a dual-purpose, unattended module that allows centrally administered batch classes to be made available to remote operators, and documents scanned at your remote sites to be imported into the Ascent Capture workflow.

As shown in Figure 1-1, the Ricochet Coversheet components work closely with Ascent Capture. The Image Importer serves as a broker between your remote operators and Ascent Capture by providing batch class information to the remote operators, and importing document packages received from remote operators into the Ascent Capture workflow. Since your remote operators do all of their work from simple, easy-to-use Web pages, they are shielded from the details of your Ascent Capture workflow.



- ❶ The process of creating a document package begins at a remote workstation. The user browses to the appropriate Web address for your Ricochet Coversheet Server, and enters index data with a form presented in the Web browser.
- ❷ After completing the form, the user triggers the creation of a cover sheet, and prints the cover sheet to an MFP. While at the MFP, the user places the printed cover sheet on top of the document to be delivered to Ascent Capture and scans.
- ❸ Images that are scanned at the MFP are transferred as a package to the IIS Web server, where the Image Importer transfers the index data and images into the Ascent Capture workflow.
- ❹ Each package is imported into Ascent Capture as a single batch that is processed through the workflow as defined by the batch class. Index data entered by the remote operator can be validated, and document images can be processed, just like any other Ascent Capture batch.

**Figure 1-1. Ricochet Coversheet in a Typical Ascent Capture System**

## Features

The following sections highlight many of the benefits provided by Ricochet Coversheet.

### Free!

It doesn't get any better than this. Ricochet Coversheet is available for free download from [www.kofax.com](http://www.kofax.com) to any existing Ascent Capture user.

### Easy Installation

Installation is a snap. All of the software can be installed on your existing IIS Web server in minutes, with minimal user intervention required. A Configuration Wizard automatically runs as part of the installation process to assist you in setting up a handful of Ricochet Coversheet options and preferences.

In addition, no Ricochet Coversheet software is installed at your remote sites. The Ricochet Coversheet Web pages run from the Ricochet Coversheet Server at your central site, and require no additional plug-ins for viewing.

### No Additional Equipment

With Ricochet Coversheet, MFP devices, digital copiers, and even FAX machines can now be used to import pre-indexed documents into your Ascent Capture workflow for release into any back-end system. There is no longer a need to purchase dedicated production scanning equipment. Instead, existing office equipment can be leveraged to process your documents.

### Easy to Use

Operators who are equipped with a Web connection, a PC, a standard browser, and a scanning device (such as an MFP) can scan documents and send them to the Ascent Capture workflow at your central site. And, since your operators are already familiar with their existing scanning devices, they can be up and running with Ricochet Coversheet in no time.

To use Ricochet Coversheet, operators point their browsers to the Ricochet Coversheet Web pages at your central site, enter index values for a document, create and print a cover sheet, and scan the cover sheet and document. It's that easy.

## Empowers Content Experts

No one knows more about a document or form than the people who created it or work closely with the information it contains. Thus, they are best qualified to index the document for later retrieval and processing. Ricochet Coversheet empowers these content experts to initiate the import process faster and more accurately than ever before.

## Low Ongoing Cost

Ricochet Coversheet does not add any additional cost to an existing production capture system. Instead, Ricochet Coversheet simply moves the responsibility of scanning from the central production facility to the remote offices of your organization.

## Internet/Intranet Support

Ricochet Coversheet is suitable for Internet and/or Intranet configurations.

## Proxy Server Support

Ricochet Coversheet can run in a proxy server environment. For example, it allows the use of a proxy server between your remote operators and your central site IIS Web server.

## Data Security

Encryption and authentication settings can be configured using IIS as desired by your Web administrator. For example:

- The Secure Sockets Layer (SSL) protocol can be enabled for the encrypted transfer of data to and from your remote operators. Using SSL is highly recommended.
- An authentication scheme (such as Anonymous, Basic authentication, or NT challenge/response) can be configured to control access to content on the IIS Web server. You can enable the authentication scheme that meets your processing requirements.

Refer to your Microsoft IIS documentation for details on administering security for your Web server.



# Installing Ricochet Coversheet

## Introduction

The following Ricochet Coversheet components must be installed at your central site where Ascent Capture is located.

- **The Ricochet Coversheet Server.** The server supports the Ricochet Coversheet Web pages that your operators use to create packages of documents at remote sites.
- **The Ricochet Coversheet Image Importer.** This is an unattended module that processes the packages sent from your remote sites to your central site, and imports the documents into the Ascent Capture workflow. It also allows Ascent Capture batch class information to be available for selection by your remote operators.

The Ricochet Coversheet components must be installed on an IIS Web server, along with Ascent Capture. Once the server-side components are installed, your remote operators can access the Ricochet Coversheet Web pages via their Web browsers. No Ricochet Coversheet software is installed on the remote stations.

This chapter provides detailed instructions for installing Ricochet Coversheet on your IIS Web server at your central site. It also lists the operating requirements for Ricochet Coversheet.

## Operating Requirements

This section provides information about the requirements for installing and using Ricochet Coversheet.

### IIS Web Server System Requirements

Ricochet Coversheet requires that your IIS Web server be installed with the following:

- **One** of the following operating systems:
  - ✓ Microsoft Windows NT Server 4.0 with Service Pack 6a (or higher)
  - ✓ Microsoft Windows 2000 Server with Service Pack 2 (or higher)
  - ✓ Microsoft Windows 2000 Advanced Server with Service Pack 2 (or higher)
- **One** of the following Microsoft Internet Information Server (IIS) versions:
  - ✓ Microsoft Internet Information Server 4.0 (with Windows NT Server)
  - ✓ Microsoft Internet Information Server 5.0 (with Windows 2000 Server)
- **Ascent Capture 5.0** (or higher) must be installed on the IIS Web Server station. This can be an Ascent Capture client or standalone station. In addition, an Ascent Capture Scan hardware key must be attached to the IIS Web server station.

### IIS Web Server Hardware Requirements

This section lists the minimum and recommended hardware requirements for installing Ricochet Coversheet on your IIS Web server.

#### Minimum

- Pentium class processor
- 128 Mbytes of memory
- 500 Mbytes of disk space for installation and working space during processing
- 800 X 600 SVGA display with 256 colors
- T1 telephone line (or better) for Internet connection
- Ascent Capture Scan hardware key
- Parallel port (standard mode) for the Ascent Capture Scan hardware key

## Recommended

- Pentium class processor
- 256 Mbytes of memory (or higher)
- 500 Mbytes of disk space (or higher) for installation and working space during processing
- 1024 X 768 SVGA display with 65K colors
- T1 telephone line (or better) for Internet connection
- Ascent Capture Scan hardware key
- Parallel port (standard mode) for the Ascent Capture Scan hardware key

## Remote Station Requirements

The Ricochet Coversheet Web pages operate as a Microsoft Windows desktop application within Internet Explorer, and require the following:

- Pentium class processor
- 800 x 600 SVGA display with 256 colors (or higher)
- **One** of the following operating systems:
  - ✓ Windows 98 Second Edition
  - ✓ Windows Me
  - ✓ Windows 2000 Professional
  - ✓ Windows NT
  - ✓ Windows XP
- Internet Explorer 5.5 (or higher) with default level settings
- TCP/IP protocol
- Internet/Intranet access to the IIS Web server
- Network or local access to a scanning and printing device

## Scanning Devices

Ricochet Coversheet supports MFP and other scanning devices that produce multi-page TIFF images with CCITT Group 3 or Group 4 compression. The scanning device must be configured to output the files to a folder that is accessible to the Ricochet Coversheet Image Importer. If your scanning device allows you to specify names for the output files, you can use any naming scheme. (The “TIF” file extension must be used.) Refer to the documentation that came with your scanning device for details about its capabilities, and instructions for specifying output locations.

## Installing Ricochet Coversheet

The following sections explain how to install and configure Ricochet Coversheet at your central site. Please read through the important installation notes before you begin your installation. If you are upgrading or reinstalling Ricochet Coversheet, read the important installation notes, and then refer to the section *Installation Maintenance* on page 24.

### Important Installation Notes

Read the following notes before you install or upgrade Ricochet Coversheet.

#### Administrator Rights Required

To install Ricochet Coversheet on your IIS Web server, the logged in user must have Windows Administrator privileges.

#### Closing Other Applications

Before installing Ricochet Coversheet, you must close all other applications (including the Control Panel, virus detection software, and toolbars) on the station.

#### Destination Locations for Installed Files

The Ricochet Coversheet installation program installs the Image Importer and the server on your IIS Web server as follows:

- **Ricochet Coversheet Image Importer** is installed to a path/folder that you specify during the installation. The default location is:

C:\Program Files\Ricochet Coversheet

In addition, the installation program creates a shortcut to the Image Importer in your Windows Start menu.

- **Ricochet Coversheet Server** is installed to:

C:\Inetpub\wwwroot\RicochetCoversheet

This folder name will become part of the Web address that your remote operators use to access the Ricochet Coversheet Web pages. For example:

`http://Path to your server/RicochetCoversheet`

## Ricochet Coversheet Configuration Wizard

The Ricochet Coversheet Configuration Wizard helps you set some basic settings required by the Image Importer, as listed below. The wizard automatically runs as part of the installation program, right after the Ricochet Coversheet software files are installed.

---

**Note** The settings that you specify with the configuration wizard are available from the Image Importer's user interface. You can modify the settings at any time after you install Ricochet Coversheet. Refer to Chapter 3 for more information about the Image Importer's user interface and the available options.

---

- **Watched Folders** store package files generated by MFP and other scanning devices at your remote sites. They are “watched” by the Image Importer so that the packages can be imported into Ascent Capture as soon as they are detected. You can specify up to 25 watched folders.

In addition, you can specify how processed files should be handled. For example, you can specify that packages are deleted when they are processed, or moved to a folder. The default is to move the packages to a folder.

- The **Polling Interval** is the amount of time that the Image Importer waits before it polls the watched folders for packages to process, and Ascent Capture for batch class information. You can specify a polling interval from 1 second to 24 hours (in seconds). The default is 300 seconds (5 minutes).
- An **Ascent Capture User Name and Password** must be specified if the Ascent Capture User Profiles feature is enabled at your central site. This will allow the Image Importer to import packages into the Ascent Capture workflow and access batch class information as necessary.
- **Logging Options** include a location for an event log file and the amount of information that is logged. The name of the log file is `RCLog_yymm.txt`, where `yy` is the last two digits of the year and `mm` is a two-digit number that represents the month that information is logged. You cannot specify a different name for the log file, but you can specify where the log file is stored.

## Browsing for Folders

For any path that you can specify during the installation process or from dialog boxes provided with the product, Ricochet Coversheet supports mapped drives or Uniform Naming Convention (UNC) format. However, the installation screens and dialog boxes do not allow you to manually enter a path. You must use the Browse or Add buttons provided on the user interface to select the desired folders. To select a path in UNC format, you can browse via your Network Neighborhood.

## Installing Ricochet Coversheet

Installing Ricochet Coversheet involves the following basic steps, which you should perform in the order listed.

- Step 1** Update the operating system, Option Pack, and Service Pack on the station to be used as your IIS Web server.
- Step 2** Install Ascent Capture as a client or standalone station on your IIS Web server.
- Step 3** Download Ricochet Coversheet from the Kofax Web site at [www.kofax.com](http://www.kofax.com) to your IIS Web server.
- Step 4** Install Ricochet Coversheet on your IIS Web server.
- Step 5** Make certain that the anonymous user has read/write access to the folder where the Ricochet Coversheet server is installed.

### Step 1 - Update Your IIS Web Server

Update the operating system on your IIS Web server as necessary, and install the required Option Packs and Service Packs. If necessary, you can install them from the Microsoft Web site. Refer to the section *Operating Requirements* on page 8 for a list of requirements.

#### ► To update Windows NT Server 4.0

- 1 Install the Windows NT 4.0 Option Pack on your IIS Web server. Choose the “Custom” installation option and select:
  - Internet Information Server (IIS)
  - Other components as required. (The installation program will automatically select additional components to be installed as required by the selected items. If this occurs, do not uncheck the additional components.)

It is recommended that you accept the directory defaults provided during the installation.

- 2 Install Service Pack 6a (or higher).

---

**Important** If you installed the Service Pack prior to installing the Windows NT 4.0 Option Pack, you must reinstall the Service Pack before you continue.

---

► **To update Windows 2000 Server**

- 1 Install Service Pack 2 (or higher) on your IIS Web server.
- 2 Add the Internet Information Services (IIS) Windows component to your server.

---

**Note** Internet Information Services (IIS) is installed on a Windows 2000 Server by default. However, if you upgraded to Windows 2000 Server, IIS will be installed by default only if IIS was installed on the previous version of Windows.

---

### Step 2 - Install Ascent Capture

Install Ascent Capture 5.0 (or higher) on your IIS Web server. You can install it as a client station or as a standalone station. In addition, make sure that you attach an Ascent Capture Scan hardware key to your IIS Web server station. Refer to your Ascent Capture documentation for details about installing Ascent Capture.

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**Tip** Ascent Capture documentation is available in PDF format from the Kofax Technical Support Web pages. To access the documentation, visit the Kofax Web site at [www.kofax.com](http://www.kofax.com) and go the Technical Support page. Click the link for your version of Ascent Capture, and select Online Manuals. Updates to Ascent Capture documentation (if any) are posted to this site. The information provided in the PDF files may supercede the documentation that came in your software package.

---

### Step 3 - Download Ricochet Coversheet

If you haven't already done so, download Ricochet Coversheet from the Kofax Web site at [www.kofax.com](http://www.kofax.com) to your IIS Web server. The name of the file that downloads is `Rcinstall.exe`. It is an executable that contains:

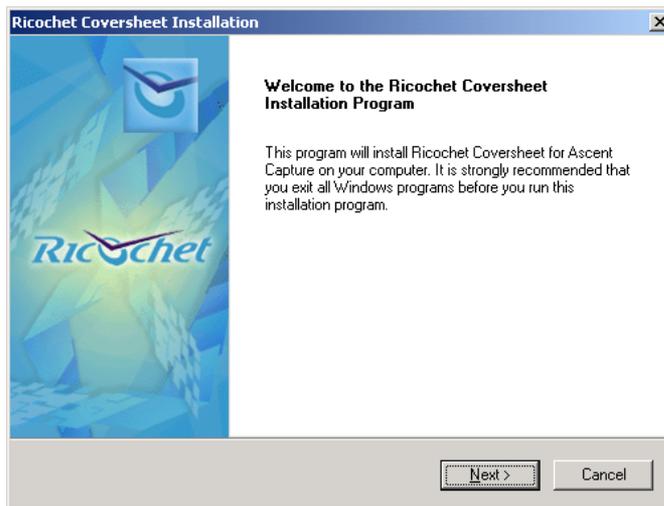
- A Setup program for Ricochet Coversheet and all the necessary software files
- This Ricochet Coversheet *System Administrator's Guide*
- Release notes (if any) with late-breaking information about the product

## Step 4 - Install Ricochet Coversheet

Install Ricochet Coversheet on your IIS Web server station.

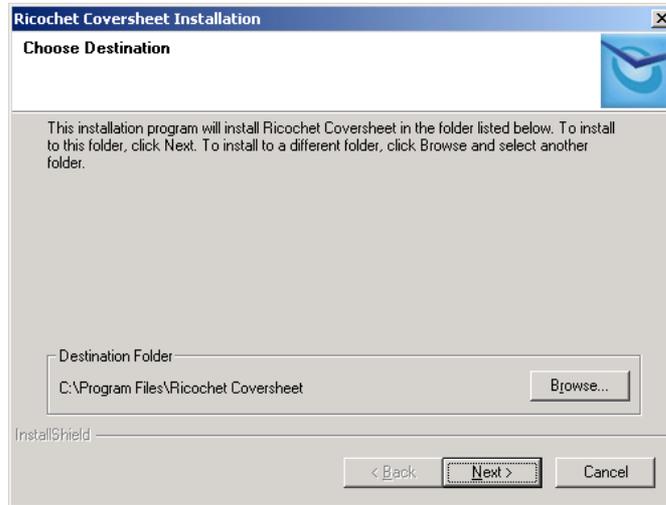
► **To install Ricochet Coversheet**

- 1 Shut down any applications (including Control Panel, virus detection software, and toolbars) that might be running on the IIS Web server.
- 2 Run Rcininstall.exe from the location where you downloaded Ricochet Coversheet. The Setup program will start, and a Welcome screen will display:



**Figure 2-1. Welcome Screen**

- 3 Click Next. The Choose Destination screen will display.



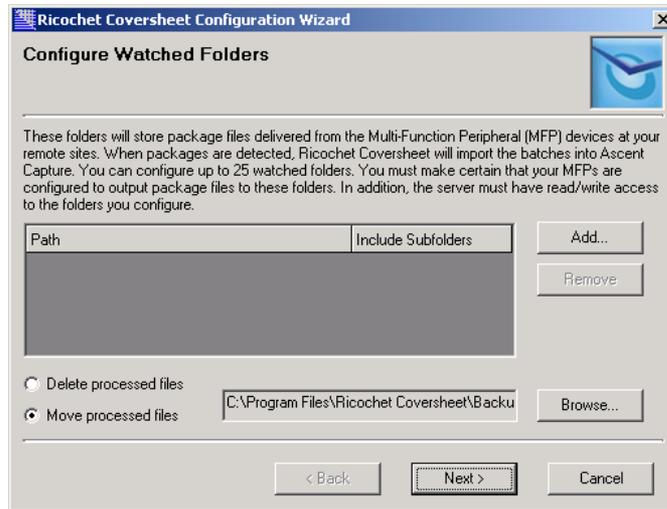
**Figure 2-2. Choose Destination Screen**

- 4 Choose the desired destination location (or accept the default location).
- 5 Click Next, and follow the instructions on your screen to install the software.
- 6 When the Ricochet Coversheet software is installed, the Ricochet Coversheet Configuration Wizard will automatically start.



**Figure 2-3. Welcome to the Configuration Wizard Screen**

- 7 Click Next. The Configure Watched Folders screen will display.



**Figure 2-4. Configure Watched Folders Wizard Screen**

- 8 Add the desired watched folders. For each watched folder to add:
- a Click Add to display the Browse for Folder dialog box.
  - b Browse for the desired watched folder, and click OK. The folder you selected will appear in the list of watched folders. See Figure 2-5.

---

**Note** The path for the watched folder can include a mapped drive, or be in UNC format. The folder must be available to your MFP (or other scanning device) and the Image Importer, and allow read/write access.

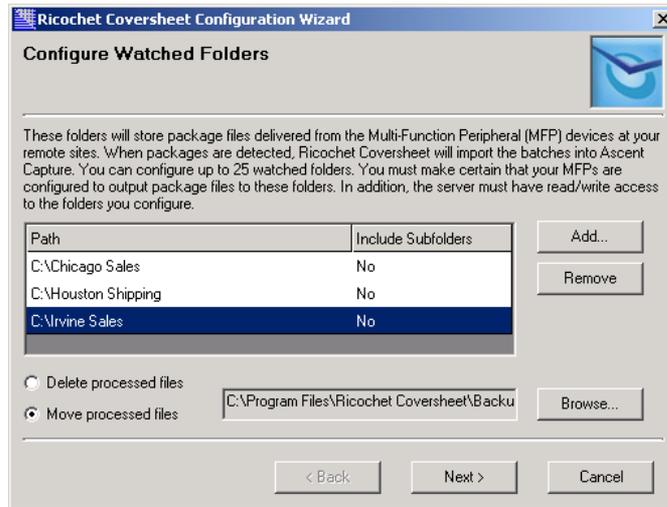
---

- 9 Specify whether subfolders of the watched folders should also be watched. To do so:
- a Select the desired watched folder from the list of watched folders.
  - b Click the field for the watched folder that appears in the “Include Subfolders” column. A drop-down list will appear.
  - c From the drop-down list, select Yes to specify that subfolders of the watched folder should be watched. Select No if you do not want the subfolders to be watched. The default is No.

---

**Note** If you select Yes, the subfolder must be available to your MFP (or other scanning device) and the Image Importer, and allow read/write access.

---



**Figure 2-5. Configured Watched Folders**

**10** Specify processing options for the watched folders as follows:

- Select “Delete processed files” if you want package files to be deleted from the watched folder after they are imported into Ascent Capture.
- Select “Move processed files” if you want package files to be moved to a folder that you specify after they are imported into Ascent Capture. Then, click Browse to specify the desired folder. The default is to move processed files to:

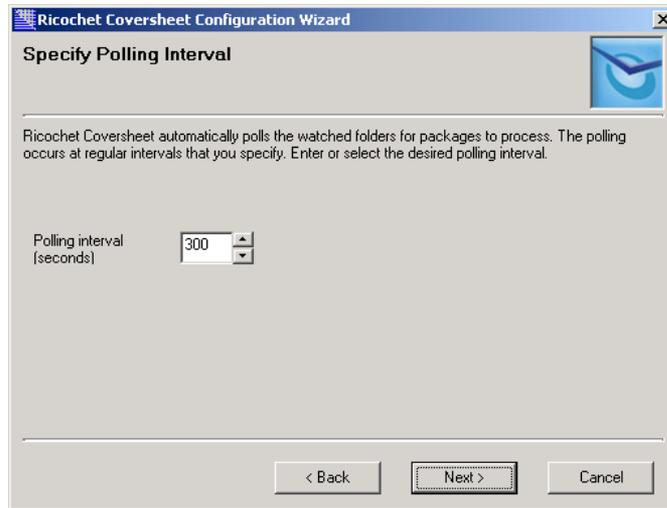
C:\Program Files\Ricochet Coversheet\Backup

---

**Note** The option that you choose for processed files will be applied to all watched folders.

---

- 11 Click Next. The Specify Polling Interval screen will display:



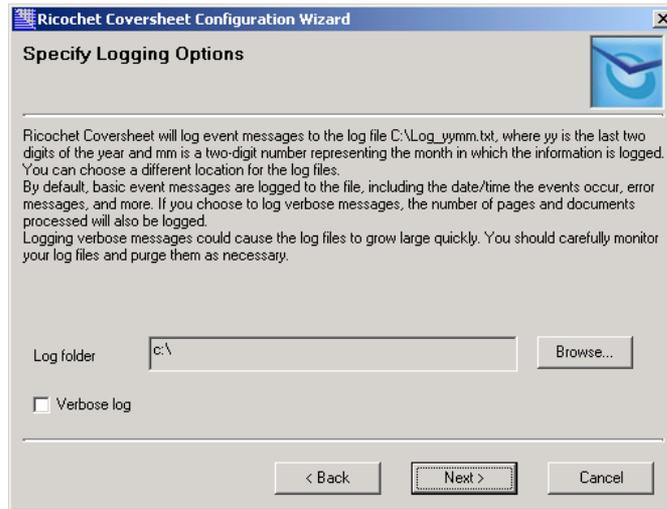
**Figure 2-6. Specify Polling Interval Wizard Screen**

- 12 Enter or select the desired polling interval. You can specify from 1 second to 24 hours (in seconds). The default is 300 seconds (5 minutes).
- 13 Click Next. The Specify User Name and Password screen will display.



**Figure 2-7. Specify User Name and Password Wizard Screen**

- 14 If the Ascent Capture User Profiles feature is enabled, enter a valid Ascent Capture user name and password.
- 15 Click Next. The Specify Logging Options screen will display:



**Figure 2-8. Specify Logging Options Wizard Screen**

- 16 Specify the desired location for the Image Importer log file. You can accept the default location, or use Browse to select a different location. If you want to log verbose information, check the “Verbose log” check box.

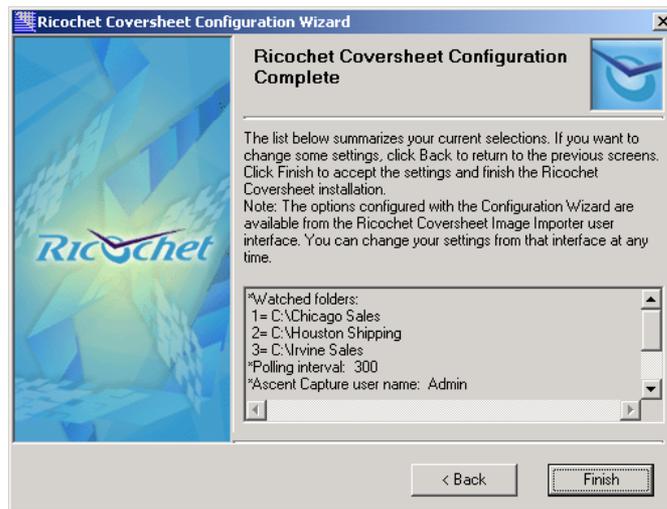
---

**Note** The path for the log file location can include a mapped drive, or be in UNC format. The folder must be available to the Image Importer, and allow read/write access.

---

The name of the log file is RCLog\_yymm.txt, where *yy* is the last two digits of the year and *mm* is a two-digit number that represents the month that information is logged. You cannot specify a different name for the log file, but you can specify where the log file is stored.

- 17 Click Next. The Ricochet Coversheet Configuration Complete screen will display, along with a summary of your configuration selections.



**Figure 2-9. Configuration Complete Wizard Screen**

- 18 Review your configuration selections. If you want to change your selections, click Back to move back to the appropriate configuration screen and edit your selections as necessary.

- 19 If your selections are correct, click Finish to finish the configuration. The Installation Complete screen will display.

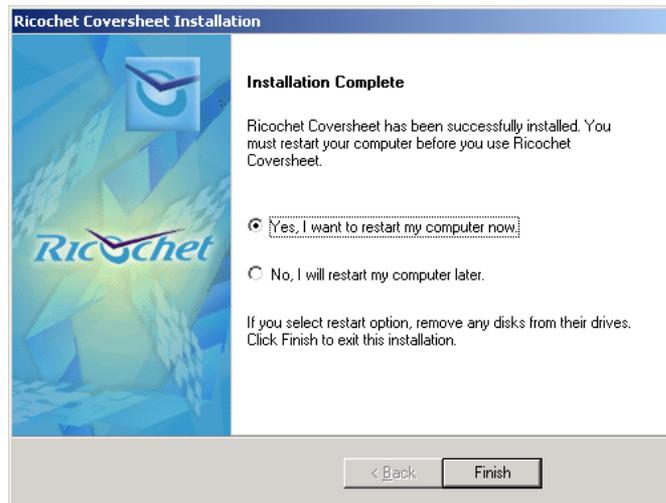


Figure 2-10. Installation Complete Screen

- 20 Select Yes to restart your computer, and click Finish.

---

**Note** You must restart your computer before you use Ricochet Coversheet.

---

### Step 5 - Set Read/Write Access for the Anonymous User

The anonymous user account is used as the logon account for remote users. For Ricochet Coversheet to work properly, the anonymous user account must have read/write access to the folder where the Ricochet Coversheet server is installed (C:\inetpub\wwwroot\ricochetcoversheet).

---

**Note** If the anonymous user does not have read/write access to C:\inetpub\wwwroot\ricochetcoversheet, the error message “Central site error: The XML file could not be written. Please contact your system administrator.” will display for your remote operator.

---

The following procedures explain how to determine the name of your anonymous user account, and set read/write access for the anonymous user.

## Determine Anonymous User

Typically, the name of the anonymous user is `IUSR_computername`, where *computername* is the name of your computer. To check the name of your anonymous user, follow the applicable procedure below.

### ► To display the anonymous user name

- 1 Run the Microsoft Management Console. To do so, do **one** of the following:
  - **Windows 2000 Server:** Select Start | Programs | Administrative Tools | Internet Services Manager.
  - **Windows NT Server:** Select Start | Programs | Windows NT 4.0 Option Pack | Microsoft Internet Information Server | Internet Service Manager.
- 2 Expand the Default Web Site tree, and right-click the RicochetCoversheet folder.
- 3 Select Properties | Directory Security tab.
- 4 Select Anonymous Access and Authentication Control | Edit. The Authentication Methods dialog box will appear.
- 5 Do **one** of the following:
  - **Windows 2000 Server:** Select Anonymous access | Edit.
  - **Windows NT Server:** Select Allow Anonymous Access | Edit.

The Anonymous User Account dialog box will appear with the name of the anonymous user. Figure 2-11 shows an Anonymous User Account dialog box for Windows 2000 Server.



Figure 2-11. Anonymous User Account Dialog Box on Windows 2000 Server

### Set Folder Permissions for Anonymous User on a FAT Partition

If Ricochet Coversheet is installed on a FAT partition, follow this procedure to ensure that the Ricochet Coversheet folder allows read/write access:

#### ► To set folder permissions (FAT)

- 1 Run Windows Explorer:
  - **Windows 2000 Server:** Select Start | Programs | Accessories | Windows Explorer.
  - **Windows NT Server:** Select Start | Programs | Windows NT Explorer.
- 2 Right-click C:\inetpub\wwwroot\ricochetcoversheet.
- 3 Select Properties, and uncheck “Read-only.”

### Set Folder Permissions for Anonymous User on NTFS Partition

If Ricochet Coversheet is installed on an NTFS partition, follow this procedure to ensure that the anonymous user has read/write permissions:

#### ► To set folder permissions (NTFS)

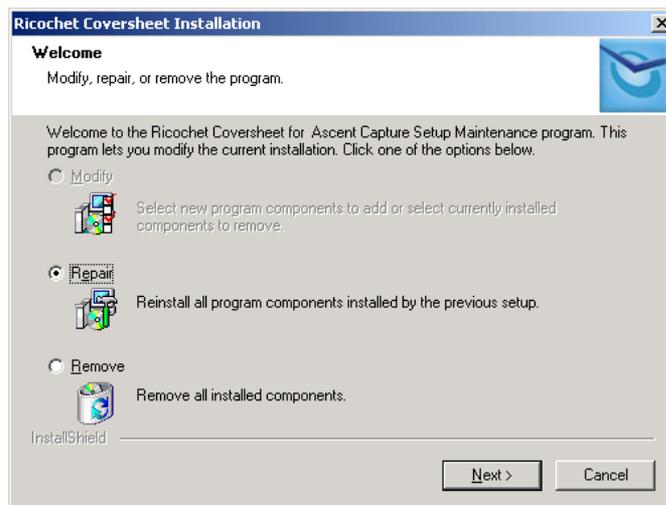
- 1 Run Windows Explorer:
  - **Windows 2000 Server:** Select Start | Programs | Accessories | Windows Explorer.
  - **Windows NT Server:** Select Start | Programs | Windows NT Explorer.
- 2 Right-click C:\inetpub\wwwroot\ricochetcoversheet.
- 3 Select Properties | Security tab. (This tab is available if the file system is NTFS.)
- 4 Make certain that the folder allows read and write access. To do so, do **one** of the following:
  - Give Everyone read/write access to the folder.
  - Add the anonymous internet user with read/write access to the folder.

## Installation Maintenance

This section explains how to upgrade, reinstall, or uninstall Ricochet Coversheet on your IIS Web server.

► **To upgrade or reinstall Ricochet Coversheet**

- 1 If necessary, download Ricochet Coversheet. Refer to the section *Step 3 - Download Ricochet Coversheet* on page 13 for instructions.
- 2 Run Setup from the location where you extracted the files from Rinstall.exe. The Welcome screen will display:



**Figure 2-12. Welcome Screen (Modify, Repair, or Remove)**

- 3 Select “Repair” and click Next.
  - 4 Follow the instructions on your screen.
- **To uninstall Ricochet Coversheet**
- 1 Run Setup from the location where you extracted the files from Rinstall.exe. The Welcome screen will display as shown in Figure 2-12. (Alternatively, you can use Add/Remove Programs to uninstall Ricochet Coversheet.)
  - 2 Select “Remove” and click Next.
  - 3 Follow the instructions on your screen.

# Ricochet Coversheet Image Importer

## Introduction

Ricochet Coversheet Image Importer allows documents to be imported into the Ascent Capture workflow from remote stations via an Internet/Intranet connection. This chapter describes how the Image Importer works, and introduces its user interface. It also provides step-by-step procedures for setting operating preferences for the Image Importer.

## How the Image Importer Works

The Image Importer is an unattended module that runs on your IIS Web server. It automatically polls the specified watched folders for *packages* delivered from your remote sites. When a package is detected, the Image Importer converts the package into an Ascent Capture batch, and imports the batch into the Ascent Capture workflow.

### Packages

A *package* is a multi-page TIFF image that contains a special-purpose cover sheet as the first page, plus one or more document pages. Packages are created by remote operators via the Ricochet Coversheet Web pages and a scanning device, such as a Multi-Function Peripheral (MFP) device.

For each package, a remote operator uses the Web pages to select the type of document they want to scan, enter the desired index data for the document, and create and print a cover sheet. Then, the operator scans the cover sheet and the document with their scanning device, which in turn outputs an image file to a location watched by the Image Importer at regular polling intervals.

The cover sheet included as the first page of a package contains information about the document in the package. For example, it contains the type of document and a pointer to the index data entered by the remote operator. The Image Importer uses the information contained on the cover sheet to import the document into Ascent Capture.

Refer to Chapter 4 for details about cover sheets and the Ricochet Coversheet Web pages.

### Polling for Packages

As an unattended module, the Image Importer requires no user intervention to process packages. Once started, it automatically polls the watched folders for packages to process. When packages are detected, the Image Importer converts them into Ascent Capture batches, and imports the batches into the Ascent Capture workflow.

The Image Importer also polls Ascent Capture for batch class information. It provides the batch classes to the remote operators as *package types*, which are a unique combination of batch class, document class, and form type settings.

Refer to the section *Package Types* in Chapter 4 for details about package types.

---

**Note:** The Image Importer ignores packages with less than two pages. This is because some scanning devices do not lock their output as it is created. So, incomplete package files may exist in the watched folders when the Image Importer polls. The skipped files are rechecked at the next polling time.

---

### Converting Packages to Batches

The Image Importer converts each package into an Ascent Capture batch that typically contains one document. The package type contained on the cover sheet specifies which batch class, document class, and form type to assign to the batch. Once imported into Ascent Capture, the batch is routed to the first queue after Scan as specified by the batch class, and can be processed like any other Ascent Capture batch.

In addition to document pages, the Image Importer also imports the index data that was entered by the remote operator for the document in the package. When the imported batch is opened in Validation at your central site, your validation operators can validate the data for the document pages.

## Packages That Cannot Be Imported

Packages that cannot be imported into Ascent Capture are automatically moved to an Error Files folder in your Ricochet Coversheet installation folder. For example, package files that do not contain a valid cover sheet as the first page will be moved to the Error Files folder.

Refer to Appendix A *Troubleshooting Tips* for more information about the Error Files folder.

## Licensing

The maximum number of pages that you can process each month via Ricochet Coversheet is dependent on the Ascent Capture Scan hardware key attached to your IIS Web server station. Packages imported into Ascent Capture decrement the counter by one for each document page, minus the cover sheet. At the beginning of each month, the counter will automatically reset to your maximum monthly allowance of document pages.

You can view the number of pages remaining for the month from the Ascent Capture Scan and Quality Control modules at your IIS Web server. The “Remaining” indicator is available on the Scan Panel from these Ascent Capture modules, just below the scanner buttons. If you have an unlimited Scan license, no “Remaining” indicator will display.




---

**Note** If the page counter runs out or is not correct, the Image Importer logs an error and stops importing packages. Refer to Chapter 5 for details about log files generated by Ricochet Coversheet.

---

## Quick Tour of Ricochet Coversheet Image Importer

The user interface for the Image Importer is similar to Ascent Capture's unattended modules, such as the Recognition Server module. It provides a menu bar from which you can select various operating preferences, and an event log into which messages are listed as processing events occur.

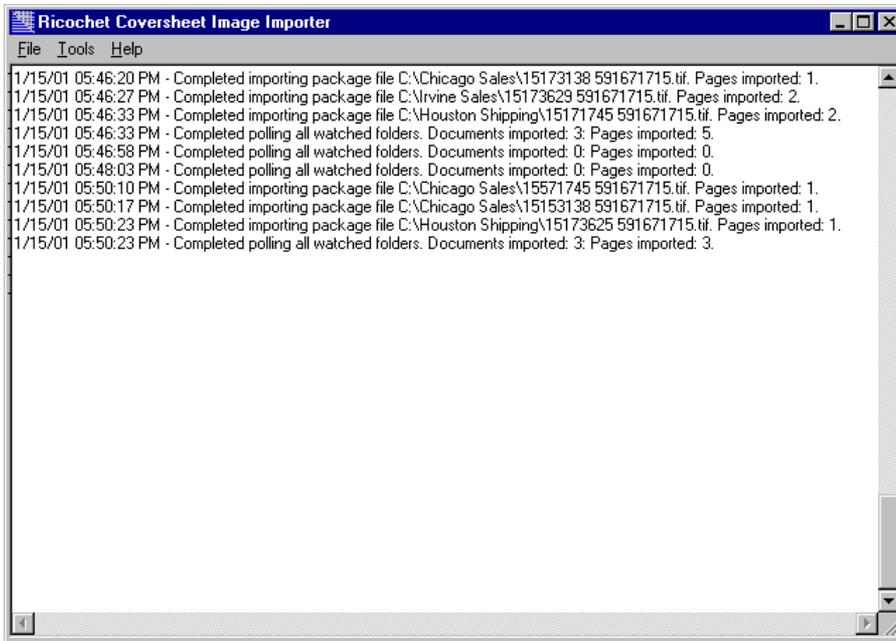


Figure 3-1. Ricochet Coversheet Image Importer - Main Screen

## File Menu

Three options are available from the File menu:

### Poll Folders

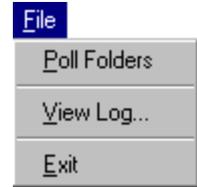
Use this option to force the Image Importer to immediately poll the watched folders, without waiting for the next scheduled polling time. Refer to *Polling Interval* in the section *Tools Menu* below for more information about polling times.

### View Log

This option launches NotePad, and displays the Image Importer's log file. Refer to the section *Logging Options* on page 35 for more information about setting options for the log file.

### Exit

Use this option to stop polling the watched folders and exit the Image Importer. This menu item exits the Image Importer module only; it does not exit or stop the Ricochet Coversheet Server or shut down Ricochet Coversheet Web pages. However, once exited, the Image Importer will not be available to poll watched folders, import batches into Ascent Capture, or update package type information for remote operators. Refer to the section *Exiting Ricochet Coversheet* on page 46 for details.



## Tools Menu

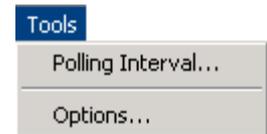
The options on the Tools menu allow you to select a polling interval and various other options:

### Polling Interval

The *polling interval* is the amount of time (in seconds) between polling times, when Image Importer checks the watched folders for packages to process and Ascent Capture for new or edited batch class information. You can specify a polling interval from 1 second to 24 hours (in seconds). The default is 300 seconds (5 minutes). Refer to the section *Polling for Packages and Batch Class Information* on page 37 for more information.

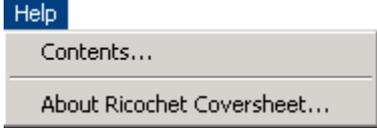
### Options

Use this option to display the Options dialog box, from which you can select various operating preferences. Refer to the section *Setting Image Importer Options* on page 31 for more details.



## Help Menu

The Help menu provides the following options:



### **Contents**

Use this option to display the table of contents for the Image Importer online help. The topics are not integrated into the standard Ascent Capture help system. You can display Ascent Capture online help from the Ascent Capture program group or any Ascent Capture module.

### **About Ricochet Coversheet**

Select this option to display the Ricochet Coversheet Image Importer About box, which contains information such as the version number of the software and copyright information. In addition, you can access the Kofax Technical Support Web pages from the About box.

## Event Log

As packages are processed, event messages are generated that describe the results of processing. The messages are listed in the Event Log area of Image Importer's main screen. See Figure 3-1.

Event messages are also logged to a log file. Refer to the section *Logging Options* on page 35 for more information about specifying options for the log file. Refer to Chapter 5 for details about the Image Importer log file, and other log files generated by Ricochet Coversheet.

## Setting Image Importer Options

You can specify various settings and operating preferences with the Options dialog box. For example, you can specify the watched folders for processing documents, the “clean up” behavior for the packages processed from the watched folders, and more.

For any path that you can specify, the Options dialog box supports mapped drives or Uniform Naming Convention (UNC) format. You must use the Browse or Add buttons provided on the dialog box to select the desired folders. To select a path in UNC format, you can browse your Network Neighborhood.

### Watched Folders

Remote users create document packages by scanning documents and special-purpose cover sheets with scanning devices, such as Multi-Function Peripheral devices (MFPs), and storing the files in folders that are “watched” by the Image Importer. When packages are detected in these folders, the Image Importer automatically processes them to deliver batches to the Ascent Capture system.

You can specify up to 25 watched folders with the Watched Folders tab of the Options dialog box as shown in Figure 3-2.

#### ► To specify watched folders

- 1 From the Image Importer’s menu bar, select Tools | Options. The Options dialog box will display. The figure below shows watched folders already configured.

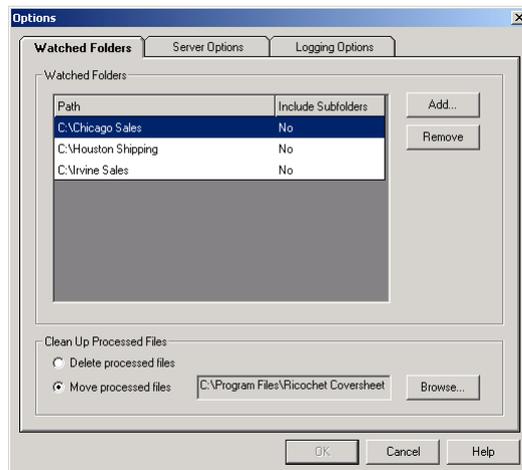


Figure 3-2. Options Dialog Box - Watched Folders Tab

- 2 From the Watched Folders tab, click Add to add a watched folder to the list of watched folders. The Browse for Folder dialog box will display.

- a From the Browse for Folder dialog box, browse to the folder that you want to add.

---

**Note** The path for a watched folder can include a mapped drive, or be in UNC format. The folder must be available to your MFP device and the Image Importer, and allow full (read/write) access.

---

- b Click OK. The folder you selected will appear in the list of watched folders.

Repeat for each watched folder that you want to add.

- 3 You can specify that all subfolders of a watched folder should also be watched. To do so:

- a Select the desired watched folder from the list of watched folders.
- b Click the field for the watched folder that appears in the “Include Subfolders” column. A drop-down list will appear.
- c From the drop-down list, select Yes to specify that all subfolders of the watched folder should be watched. Select No if you do not want the subfolders to be watched. The default is No.

---

**Note** If you select Yes, the subfolders must be available to your scanning device and the Image Importer, and allow full (read/write) access.

---

Repeat for each watched folder.

- 4 If necessary, you can remove watched folders from the list. To do so:
  - a Select the folder that you want to remove from the list of watched folders.
  - b Click Remove.

Repeat for each folder that you want to remove.

- 5 If desired, you can specify the clean up behavior for the watched folders. See the next section *Clean Up Options for Processed Files* for more information.
- 6 When you are finished selecting options from the Watched Folders tab, click OK to save your selections and close the dialog box, or select one of the other tabs to set other options.

## Clean Up Options for Processed Files

Once packages are imported into Ascent Capture, you can allow the Image Importer to delete the package files from the watched folders, or move the package files to a location that you specify.

---

**Note** Packages that cannot be imported into Ascent Capture are automatically moved to the Error Files folder in your Ricochet Coversheet installation folder. The default location is C:\Program Files\Ricochet Coversheet\Error Files on your IIS Web server. Refer to Appendix A *Troubleshooting Tips* for more information.

---

### ► To specify clean up options for processed files

- 1 From the Watched folders tab of the Options dialog box, specify the desired clean up option:
  - Select “Delete processed files” to delete the package files after the batches are imported into Ascent Capture.
  - Select “Move processed files” to move the package files to a different folder after the batches are imported into Ascent Capture. Click Browse to select the desired folder. (This is the default.)

---

**Note** If you select “Move processed files,” the path for the folder that you specify can include a mapped drive, or be in UNC format. The folder must be available to the Image Importer, and allow full (read/write) access.

---

The option that you specify applies to all watched folders.

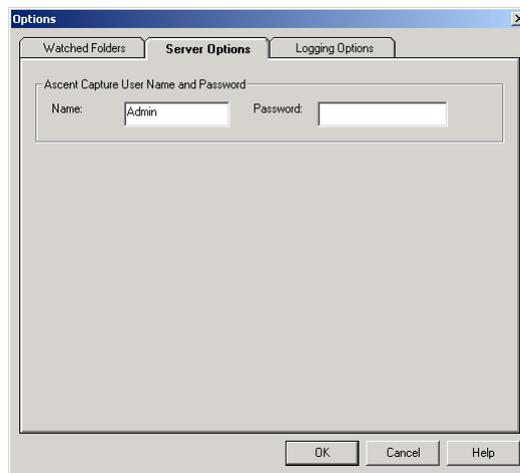
- 2 When you are finished selecting options from the Watched Folders tab, click OK to save your selections and close the dialog box, or select one of the other tabs to set other options.

## Login Information for Ascent Capture

If the Ascent Capture User Profiles feature is enabled at your central site, you must specify a valid Ascent Capture user name and password for the Image Importer. This will allow the Image Importer to import packages into Ascent Capture and access batch class information.

► **To specify Ascent Capture log in information**

- 1 From the Image Importer's menu bar, select Tools | Options. The Options dialog box will display as shown in Figure 3-2 on page 31. Select the Server Options tab as shown below:



**Figure 3-3. Options Dialog Box - Server Options Tab**

- 2 Enter the appropriate Ascent Capture user name and password. (To verify user information, launch the Ascent Capture Administration module and select Edit | User Profiles. If necessary, contact your Ascent Capture system administrator for assistance.)
- 3 When you are finished selecting options from the Server Options tab, click OK to save your selections and close the dialog box, or select one of the other tabs to set other options.
- 4 Refer to your Ascent Capture documentation for more details about the User Profiles feature.

Note the following:

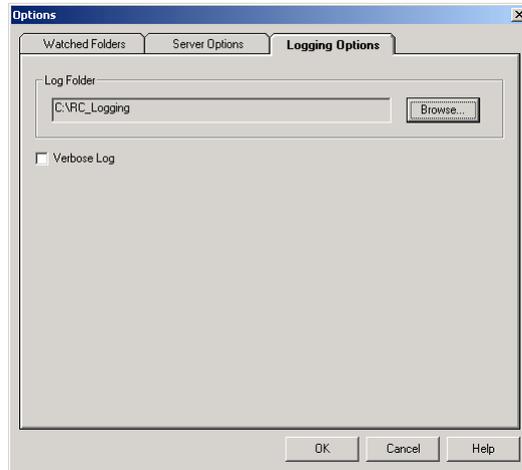
- When Image Importer starts, it “logs in” to Ascent Capture. If it cannot gain access, the message “Could not log in to the Ascent Capture system” will display in the Image Importer’s event log area. The Image Importer will not poll watched folders or perform any other processing. If this occurs, use the Options dialog box to specify a valid Ascent Capture user name and password. The Image Importer will attempt to gain access again at the next polling time.
- Once Image Importer successfully logs in to Ascent Capture, it will continue to use the same user name and password until it is shut down. If you specify a different user/password from the Options dialog box, or edit users from the Ascent Capture Administration module, you must shut down the Image Importer and restart it for the changes to take effect.

## Logging Options

The Image Importer logs event messages and errors to a log file. The name of the log file is `RCLog_yymm.txt`, where *yy* is the last two digits of the year and *mm* is a two-digit number that represents the month that information is logged. You cannot specify a different name for the log file, but you can specify where the log file is stored and the amount of information that is logged.

### ► To specify log file settings

- 1 From the Image Importer’s menu bar, select Tools | Options. The Options dialog box will display as shown in Figure 3-2 on page 31.
- 2 Select the Logging Options tab as shown below:



**Figure 3-4. Options Dialog Box - Logging Options Tab**

- 3 To specify the location of the log file, click Browse. The Browse for Folder dialog box will display:
  - a From the Browse for Folder dialog box, browse to the folder that you want to specify as the location for the log file.

---

**Note** The path for the log file location can include a mapped drive, or be in UNC format. The folder must be available to the Image Importer, and allow full (read/write) access.

---

- b Click OK. The folder you selected will appear as the Log folder.
- 4 If desired, check the “Verbose log” option to log more detailed information to the log file. Without verbose logging, polling messages and errors (if any) are logged. With verbose logging, messages about each package imported into Ascent Capture are also logged. Refer to Chapter 5 for a description of the information logged to the log file.
- 5 When you are finished selecting options from the Logging Options tab, click OK to save your selections and close the dialog box, or select one of the other tabs to set other options.

## Polling for Packages and Batch Class Information

As an unattended module, the Image Importer automatically polls at defined intervals for the following:

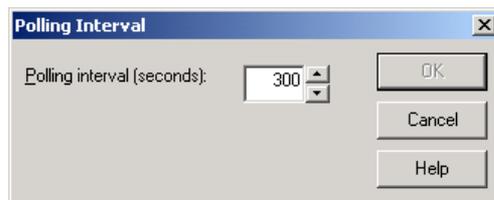
- **Packages to process from watched folders.** All complete and valid packages from the watched folders are processed, and batches of documents from the packages are imported into the Ascent Capture workflow. Package files that are still open by scanning devices are skipped and rechecked at the next polling time.
- **Batch class information from Ascent Capture.** Any new or edited batch classes published since the previous polling time are made available as package types for remote operators.

### Setting the Polling Interval

You use the Polling Interval dialog box to set the polling interval.

#### ► To specify a polling interval

- 1 From the Image Importer's menu bar, select Tools | Polling Interval. The Polling Interval dialog box will display:



**Figure 3-5. Polling Interval Dialog Box**

- 2 Enter or select the desired polling interval. You can specify a polling interval from 1 second to 24 hours (in seconds). The default is 300 seconds (5 minutes).

## Batch Class/Document Class Considerations

The following sections describe limitations and recommendations for batch classes and document classes to be used for Ricochet Coversheet processing. Refer to your Ascent Capture documentation for more information about batch class and document class settings.

### User Profile Restrictions Are Ignored

Ricochet Coversheet remote operators never log into Ascent Capture, so user profile limitations for batch classes do not apply. All published batch classes that meet the requirements for Ricochet Coversheet are available for selection by remote operators.

### Batch Class/Document Class/Form Type Names

Batch classes are provided to your remote operators as “package types,” which are a unique combination of batch class name, document class name, and form type name. For example, if your batch class, document class, and form type names are “Order Forms,” “Catalog Orders,” and “Northwest Order Forms,” respectively, the package type name available to your remote operators will be:

Order Forms - Catalog Orders - Northwest Order Forms

If you define another form type named “TriSpectrum Order Forms” for that batch class/document class, the following package types will be available to your remote operators:

Order Forms - Catalog Orders - Northwest Order Forms

Order Forms - Catalog Orders - TriSpectrum Order Forms

It is recommended that you use descriptive and meaningful names for your batch classes, document classes, and form types.

### Batch Separation

Each package received from your remote sites contains one batch. Therefore, Ascent Capture batch separation based on patch codes does not apply to Ricochet Coversheet packages.

### Batch Fields

Batch fields are not displayed for remote operators. In addition, batch classes that contain required batch fields will not be available for use with Ricochet Coversheet.

## Document Separation

Ricochet Coversheet is designed for creating packages that contain a single document. However, if your processing requirements dictate that your packages contain multiple documents, fixed-page document separation can be used. With fixed-page document separation, pages imported into Ascent Capture are separated into individual documents based on the defined number of pages per document.

Consider this scenario: Your batch class has fixed-page document separation enabled, and the form type settings for the document class defines each document as having two pages. One of your remote operators selects the package type based on this batch class/document class/form type to create a cover sheet, and scans the cover sheet plus six document pages. When the package is imported into Ascent Capture, the resulting batch will contain three, two-page documents.

With fixed-page document separation, note the following:

- No visual display or indicator is provided to remote operators for package types that require a specific number of pages. If you define a batch class/document class/form type with fixed-page document separation, you should notify your remote operators of the page count requirements.
- Packages that do not contain the appropriate number of pages will be imported into Ascent Capture and routed to Quality Control in error. The document pages will be separated into as many documents as possible per the defined number of pages per document, but the remaining pages will be “loose” in the batch.
- Only one set of index values can be entered by remote operators for a package, regardless of how many documents may be contained in the package. Therefore, multi-document packages for which document separation is enabled will apply the same set of index values to each document when the batch is imported into Ascent Capture.

If your documents contain index data that can be read via an automatic recognition method (such as OCR, ICR, or others), you may want to define zones for the index fields and enable the appropriate recognition method. Index fields for zones that are set for automatic recognition will not display for remote operators. Values for such index fields can be read with the Recognition Server module at your central site. See the section *Automatic Recognition of Zones* on page 43 for more information.

## Page Registration

Ascent Capture's page-level registration feature is very robust and can correctly register a wide variety of forms. However, in some cases, you may get better results by disabling page registration and using OCR registration zones instead.

Because the scanning devices used at your remote sites may scan at different resolutions than your sample pages, it is recommended that you disable page-level registration for form types used in package types, and rely on OCR registration zones to register your pages. The registration will occur at your central site, after packages from remote sites are imported into the Ascent Capture workflow and the batches are processed through the Recognition Server module.

### ► To disable page-level registration

- 1 From the Ascent Capture Administration module's batch class or document class tree view, right-click the desired form type. A context menu will display.
- 2 From the context menu, select Properties. The Form Type Properties dialog box will display.
- 3 Select the Image tab, and set the Page Registration Confidence slider to zero.
- 4 Click OK to save your settings and close the Form Type Properties dialog box.
- 5 Publish your batch class when you are finished editing it.

### ► To create a registration zone

- 1 From the Ascent Capture Administration module's batch class or document class tree view, expand the desired form type and select the sample page. The sample page will display in the viewer.
- 2 From the button bar, click the Create Registration Zone button. Your cursor will change to a cross hair.
- 3 With your cursor on the sample page, draw a rectangle around the area to use as a registration zone. The Create Registration Zone dialog box will display. Ascent Capture will automatically select an OCR recognition profile and search text within the zone.
- 4 Click the Test button to test the zone. Edit the settings as necessary until the results are as desired.

- 5 Click OK to accept the settings and close the Create Registration Zone dialog box. The registration point will be visible within the zone on the sample page in the lower left position of the left-most character of the search text. If no text is found, the registration point will be created in the center of the zone.
- 6 Create additional registration zones as desired.
- 7 Publish your batch class when you are finished editing it.

Registration zones are processed by the Recognition Server module. If you create registration zones, you must make certain that Recognition Server is defined as a processing queue for the batch class.

► **To add Recognition Server to the list of processing queues**

- 1 From the Administration module's batch class tree view, right-click the desired batch class. A context menu will display.
- 2 From the context menu, select Properties. The Batch Class Properties dialog box will display.
- 3 Select the Queues tab. If Recognition Server is not listed in the list of Selected Queues:
  - a Select Recognition Server from the list of Available Queues.
  - b Click Add. Recognition Server will be added to the Selected Queues.
- 4 Click OK to save your settings and close the Batch Class Properties dialog box.
- 5 Publish your batch class when you are finished editing it.

Refer to your Ascent Capture documentation for more details about registration zones and tips for setting them up.

## Index Fields

Index fields are displayed for your remote operators from the Ricochet Coversheet Web pages. The following sections describe the behavior of index field settings for Ricochet Coversheet. Refer to your Ascent Capture documentation for details about index fields.

### Default Values for Index Fields

Default values for index fields are not displayed for remote operators. In addition, known values defined for the field types associated with the index fields are not displayed.

### Hidden Fields

Index fields for which the “Hidden” attribute is set to True will not display for remote operators.

### Sticky Fields

Because remote operators process only one document for each package, sticky fields are not supported. The Ricochet Coversheet Web pages will treat sticky fields as if the “Sticky” attribute is set to False. No “sticky” values will be preserved from one package to the next.

### Required Index Fields

The Ricochet Coversheet Web pages honor the “Required” attribute for index fields. Your remote operators will not be able to create a cover sheet for a document until they enter values for all required index fields.

On the other hand, if no “Required” index fields exist for a document class, remote operators can create cover sheets for those document types without entering any index values. Therefore, if you want to force your remote operators to enter index values, you must assign the “Required” attribute to those index fields.

### Batch Totals Not Allowed

Batch totaling is not supported. Batch classes that contain any document classes that include index fields for which batch totaling is enabled will not be available for use with Ricochet Coversheet.

## Index Field Validation

The Ricochet Coversheet Web pages perform limited validation on index data entered by remote operators. Remote operators will not be allowed to enter more characters than defined for an index field, but no data type validation will be performed. In addition, custom validation scripts associated with index fields are ignored by the Ricochet Coversheet Web pages.

However, batches imported from Ricochet Coversheet can be routed through the Ascent Capture Validation module in the Ascent Capture workflow. The Validation module will process the batches as it would any other Ascent Capture batches. Each index field will be validated for data type and length as defined by the field type associated with the index field. Any custom validation scripts will run against the index fields in Validation.

---

**Note** It is recommended that all batches imported from Ricochet Coversheet be processed through the Ascent Capture Validation module at your central site.

---

## Automatic Recognition of Zones

Index fields for zones that are set for automatic recognition (such as OCR, ICR, OMR, bar code recognition, or patch code recognition) will not display for remote operators. Values for the auto-recognized zones will be read when the batch is processed through the Recognition Server module at your central site.

---

**Note** Batch classes that enable automatic recognition of zones cannot be published unless the Recognition Server is part of the defined workflow.

---

## eDocument Support

The Image Importer can import packages created as TIFF image files with CCITT Group 3 or Group 4 compression. It cannot import non-image files (eDocuments), such as Microsoft Word files, Excel files, etc.

Batch classes for which non-image file support is enabled can be used with Ricochet Coversheet. However, non-image files cannot be imported with Image Importer. They will be ignored, and left in the watched folders.

## Performance Considerations

Ascent Capture is optimized for processing batches that contain 100-1,000 documents. Processing a document within a batch is very fast compared to processing one-document batches.

For batches imported from Ricochet Coversheet that contain one document, you may want to control which operators *at your central site* process those batches. You can do this via the Ascent Capture User Profiles feature by assigning the batch classes used to create Ricochet Coversheet packages to certain operators at your central site.

---

**Note** The following procedure impacts the operators *at your central site only*. It does not limit which batch classes your remote operators can use as package types. User profile restrictions are ignored by the Ricochet Coversheet Web pages.

---

► **To assign batch classes to an operator at your central site**

- 1 Start the Administration module at your central site.
- 2 From the menu bar, select Edit | User Profiles. The User Profiles dialog box will display.
- 3 Check the check box to enable User Profiles, if it is not already checked.

---

**Note** If you enable the Ascent Capture User Profiles feature, you must specify an Ascent Capture user name and password for the Ricochet Coversheet Image Importer. You do this from the Image Importer Options dialog box. Refer to *Login Information for Ascent Capture* on page 34.

---

- 4 To create or edit a user, do the following:
  - **To create a user**, right-click in the Users section and select New from the context menu.
  - **To edit a user**, right-click on the desired user listed in the Users section and select Edit from the context menu.

The User Profile Properties dialog box will display.

- a From the General tab, enter the desired user ID and password, and other options as desired for the user.
- b From the Assigned Batch Classes tab, select or edit the assigned batch classes for the user. Assign the batch classes that will be used to create Ricochet Coversheet packages.

- 5 Click Apply to save your changes. Then, click OK to close the User Profile Properties dialog box.
- 6 If you are finished editing User Profiles, click Save to save your changes. Then, click Close to close the User Profiles dialog box; otherwise, proceed to the next step.
- 7 To create or edit a group, do the following:
  - **To create a group**, right-click in the Groups section and select New from the context menu.
  - **To edit a group**, right-click the desired group listed in the Groups section and select Edit from the context menu.

The Group Profile Properties dialog box will display:

- a From the General tab, select or edit the name for the group.
  - b From the Assigned Batch Classes tab, select or edit the assigned batch classes for the group. Assign the desired batch classes that will be used to create Ricochet Coversheet packages.
  - c From the Assigned modules tab, select or edit the assigned modules for the group.
- 
- Note** No log in is required to launch the Image Importer, so it will not show up in the list of modules. Any user, regardless of the modules assigned to that user, can launch the Image Importer.
- 
- d From the Members tab, select or edit the members to be part of the group.
- 8 Click Apply to save your changes. Then, click OK to close the Group Profiles Properties dialog box.
  - 9 If the Save button is enabled, click Save to save your changes. Then, click Close to close the User Profiles dialog box. Refer to your Ascent Capture documentation for more details about user profiles.

## Starting the Image Importer

Once installed, the Image Importer automatically starts whenever you restart your IIS Web server station. If you exit the Image Importer, you can restart it from your Windows Start menu.

- ▶ **To start Image Importer from the Start menu**, click Start | Programs | Ricochet Coversheet | Image Importer. The Image Importer will start.

---

**Note** The Image Importer cannot be started as a service.

---

## Exiting Image Importer

You can exit the Ricochet Coversheet Image Importer from the File menu on the menu bar. Doing so shuts down the Image Importer. It does not shut down the Ricochet Coversheet server or any Ricochet Coversheet Web pages that are currently running. Remote operators can continue to create packages, even if the Image Importer is shut down.

---

**Note** Packages cannot be imported into Ascent Capture unless the Image Importer is running. In addition, new batch class information cannot be made available to remote operators. Therefore, you should keep the Image Importer running so that processing can occur without delay.

---

- ▶ **To exit Image Importer**

- 1 From the Image Importer's menu bar, select File | Exit. Refer to the section *File Menu* on page 29 for more information about the File menu and the Exit option.
- 2 When prompted to confirm, choose Yes to exit.

# Ricochet Coversheet Web Pages

## Introduction

The Ricochet Coversheet Web pages allow operators to create packages of documents at remote sites, and make them available to the Ascent Capture workflow at your central site. Each package contains one or more document pages, along with a cover sheet that includes information required to process the package at your central site.

This chapter explains how the Web pages work, and introduces the user interface available to your remote operators. It also provides a step-by-step procedure for creating packages from remote sites to assist you in supporting your remote operators.

## How the Web Pages Work

The Web pages are a set of ASP pages installed with Ricochet Coversheet at your central site. Remote operators can access the Web pages by pointing their browsers to the IIS Web server on which Ricochet Coversheet is installed.

Once the initial Web page is displayed, the operators can specify the type of package they want to create based on the documents or forms they want to deliver to the central site. Then, the operators can enter index data for that package, and create a cover sheet to be scanned with their document at their Multi-Function Peripheral (MFP) or other scanning device.

Packages scanned at remote sites must be output to folder locations that you specify. The folders are “watched” by the Ricochet Coversheet Image Importer, which runs at the central site. When packages are detected, they are imported into the Ascent Capture workflow by the Image Importer. Refer to Chapter 3 for more details about how the Image Importer works.

## Package Types

A *package type* is a set of batch class settings that have been configured with the Ascent Capture Administration module at your central site. When a remote operator accesses the Web pages in a browser, the Image Importer retrieves the batch class information from Ascent Capture, and uses it to populate a list of package types for the remote operator. The name of a package type is a unique combination of batch class name, document class name, and form type name defined for each batch class.

Only published batch classes are made available to your remote operators, but some limitations apply. For example, batch classes that contain required batch fields cannot be used for Ricochet Coversheet processing. Such batch classes will not be made available in the list of package types for your remote operators. Refer to the section *Batch Class/Document Class Considerations* in Chapter 3 for information about creating batch classes for use with Ricochet Coversheet.

## Cover Sheets

A cover sheet created by Ricochet Coversheet contains package-specific information that allows the document in the package to be imported into the Ascent Capture workflow. For example, it contains the name of the package type selected by the remote operator, a pointer to an internal structure that contains the index values for the document, and more.

Remote operators trigger the creation of the cover sheet from a Ricochet Coversheet Web page, although the cover sheet itself is actually created by Ricochet Coversheet server at the central site. Once created, the completed cover sheet is displayed in the remote operator's browser window, from which it can be printed. Then, the printed cover sheet must be placed on top of the documents to process, and scanned with the documents at the remote operator's scanning device.

Note that all documents in the package are imported as a single batch into Ascent Capture. In addition, all document pages in the package are imported as a single document, unless fixed-page separation is enabled for the package type. Refer to the section *Batch Class/Document Class Considerations* in Chapter 3 for details about document separation.

---

**Important** Cover sheets are “time critical,” and designed to be used for importing packages into Ascent Capture by midnight of the day they are created. If they are not used before they expire, packages will not be imported. Packages not imported into Ascent Capture must be re-created.

---

## Scanning Devices

The MFPs or other scanning devices at your remote sites must be configured to output scanned image files to specified folders. Once the remote operator scans the cover sheet and document, the package is available for importing into Ascent Capture. The Image Importer watches for scanned packages in the device's output folders, and automatically processes them as they are found. No further action is required by your remote operators.

Refer to the documentation that came with your MFP or other scanning device for instructions on configuring output locations.

Refer to the section *Scanning Devices* in Chapter 2 for a list of operating requirements.

## Quick Tour of the Web Pages

The main Ricochet Coversheet Web page is shown in Figure 4-1. It contains a Package Definition Form that allows remote operators to select a package type for a document. Once a package type is selected, the Package Definition Form expands to provide index fields for the package type.

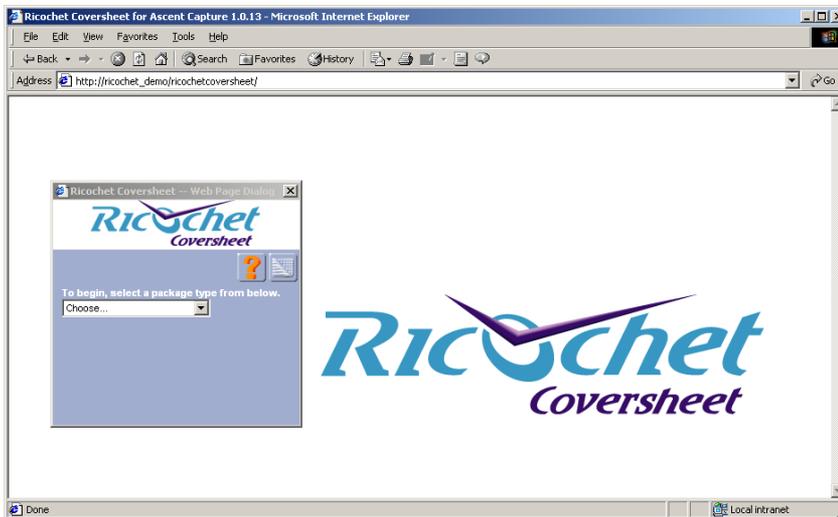


Figure 4-1. Ricochet Coversheet - Main Web Page

## Package Definition Form

The Package Definition Form provides a convenient way for remote operators to select the type of package they want to deliver to your central site, enter the desired index values for the package, and create a cover sheet.

### List of Package Types

When the Package Definition Form is first displayed, it contains a drop-down list of package types from which remote operators can select. For example, if an order form is to be processed, the operator can select the package type for that order form.



**Figure 4-2. List of Package Types**

Once the remote operator selects a package type, the Package Definition Form expands to display a list of index fields for that package type as shown in Figure 4-3.

Note that the list of package types is automatically populated with current types each time the browser is launched and the Ricochet Coversheet Web pages display. However, once the list is populated for a session, it does not automatically refresh if batch class information changes at the central site. To refresh the list of package types at any time during a session, select View | Refresh from the browser's menu bar.

### List of Index Fields

Index values are used as keywords or release values associated with a document. The list of index fields (including their names and other properties) are derived from the batch class/document class/form type used to define the package type. Refer to your Ascent Capture documentation for more details about defining index fields.

Once the index fields are displayed, remote operators can enter values for the index fields as necessary. The operator's cursor will initially be positioned in the first index field as shown in Figure 4-3, allowing the operator to easily enter the first index value. Then, to move from field to field, the operator can press the Tab key or position the cursor with their mouse.

The screenshot shows a web browser window titled "Ricochet Coversheet -- Web Page Dialog". The page features the Ricochet Coversheet logo at the top. Below the logo, there is a help icon (question mark) and a print icon. A message reads: "To begin, select a package type from below." Below this is a dropdown menu currently set to "Orders-Catalog-Tri Spectrum". There are three input fields: "First Name", "Last Name", and "Zip Code". The "Last Name" and "Zip Code" labels have a red asterisk next to them. At the bottom of the form is a "Create" button.

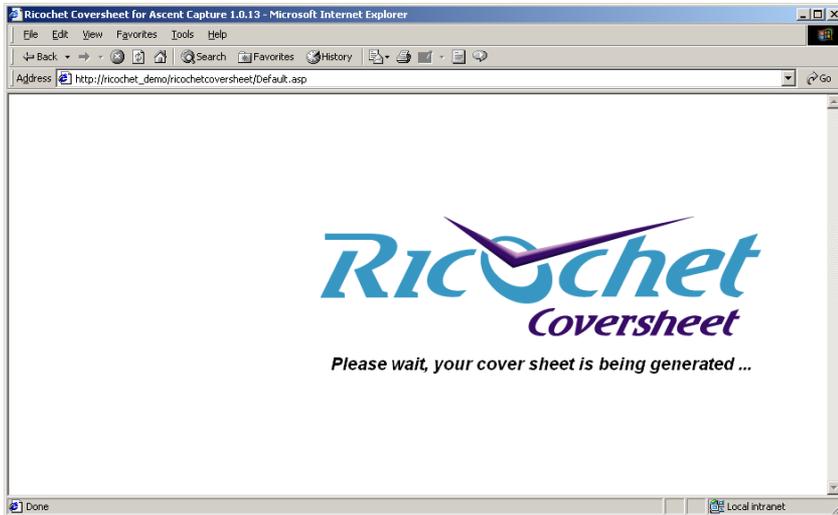
**Figure 4-3. Index Fields in Package Definition Form**

When all index values are entered, the operator can click the Create button to create a cover sheet. Note that any index field for which a value is *required* is shown with a red asterisk next to the index field name. Values must be entered for these fields before a cover sheet can be created. In addition, hidden index fields and index fields that require automatic recognition (such as OCR, ICR, and others) will not display for your remote operators. Refer to the section *Batch Class/Document Class Considerations* in Chapter 3 for details about index field behavior.

### Create Button

The Create button triggers the creation of a cover sheet at the central site. All information entered or specified on the Package Definition Form, as well as some internal information, is used to create the cover sheet.

Clicking Create causes the Package Definition Form to be replaced by a “Please wait, your cover sheet is being generated” message as shown in Figure 4-4 on the next page. When the cover sheet is completely generated, it displays in the browser window as shown in Figure 4-5 on page 53.



**Figure 4-4. Cover Sheet Being Generated Message**

### Toolbar

The toolbar at the top of the Package Definition Form provides a convenient way for your remote operators to access online help and an About box.

**Table 4-1. Toolbar Buttons**

Button	Command	Description
	Display Online Help	This button displays online help for your remote users. The help system provides step-by-step instructions for creating cover sheets and packages, and a description of all user interface items provided by the Web pages. The help pages are displayed in a separate browser window, allowing your operators to access online help without having to close the Web pages.
	Display About Box	This button displays an About box that contains copyright and version information.

## Cover Sheet Page

Cover sheets are created by the Ricochet Coversheet server at your central site, but displayed for remote users in their Web browsers via the Ricochet Coversheet Web pages as shown in Figure 4-5. Once displayed, the cover sheets can be printed via the browser's print capabilities. For example, they can be printed by clicking the browser's Print button, or selecting File | Print from the browser's menu bar.

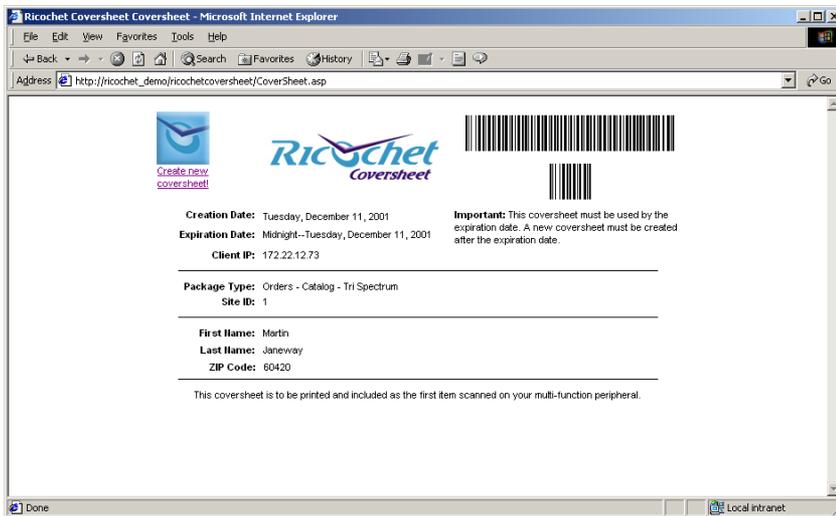


Figure 4-5. Cover Sheet Page

### Information Contained on a Cover Sheet

The information contained on a cover sheet is used by the Ricochet Coversheet Image Importer to pass packages into the Ascent Capture workflow as batches. Each cover sheet contains the following items:

#### Pointer to Index Data

The information contained in the bar codes at the top of the cover sheet point to the location of the index data entered by the remote operator. The index data is stored in an XML file on the Ricochet Coversheet server.

#### Creation Date

This is the date that the cover sheet was created. It is based on the date/time settings of the IIS Web server station on which the Ricochet Coversheet server files are installed.

### **Expiration Time/Date**

This is the date that the cover sheet will expire. Cover sheets expire at midnight of the day they are created. For example, if a cover sheet is created on 11/16/2001, it will expire at midnight of that same day.

### **Client IP**

This is the IP address of the client station that originated the package. This information could be helpful when troubleshooting packages that cannot be imported into the Ascent Capture workflow. Refer to Appendix A for details about troubleshooting problems.

### **Package Type**

This is the package type selected by the remote operator. Refer to the section *Package Types* on page 48 for more information about package types.

### **Site ID**

This is the Ascent Capture site ID of the IIS Web server that created the cover sheet. It is used in Ascent Capture wherever “site ID” is used. For example, if the Ascent Capture Value {Site ID} is defined as a release value for a batch class used by a remote operator to create a package, the Ascent Capture value will expand to the site ID of the IIS Web server as shown on the cover sheet.

### **Index Fields**

This is a list of index values entered by the remote operator. They are shown on the cover sheet for informational purposes only, because the values are also stored in an internal structure passed to the central site.

### **Create New Cover Sheet Button**

Clicking the “Create new coversheet!” button (or link) from the Cover Sheet page returns you to the main Web page, from which you can create a new package.



## Creating Packages

Remote operators can display the main Ricochet Coversheet Web page from any workstation that has Internet/Intranet access to the Ricochet Coversheet server installed at your central site.

---

**Tip** Provide the following instructions to your remote operators, along with the appropriate Web address of the IIS Web server on which the Ricochet Coversheet server is installed.

---

► **To create a package**

- 1 Start your Web browser. In the Address box, enter the Web address of the Ricochet Coversheet server. For example, enter:

http:// *Your Server*/Ricochet Coversheet

where *Your Server* is the name of the IIS Web server at your central site where Ricochet Coversheet is installed.

- 2 The main Ricochet Coversheet Web page will display, as shown in Figure 4-1 on page 49.
- 3 From the drop-down list on the Package Definition Form, select the desired package type. For example, if you want to process an order form, select the package type for that order form.



Figure 4-6. Package Definition Form with Package Types

- 4 Once a package type is selected, the Package Definition Form will expand to display the index fields (if any) associated with the package type. Your cursor will be positioned in the first index field.

---

**Note** For some package types, no index fields will display. This will be the case if all index fields are “hidden” or all index data is set to be read by an automatic recognition method, such as OCR, ICR, etc. at the central site. Refer to the section *Batch Class/Document Class Considerations* in Chapter 3 for more information.

---

**Figure 4-7. Package Definition Form With Index Fields**

- 5 If index fields display, enter index data:
  - a Type the desired value for an index field.
  - b Press Tab to move to the next field. (Alternatively, you can use your mouse to move from field to field.)

---

**Note** Index fields shown with a red asterisk to the right of the index field name are required, and you must enter values for these fields. If you do not, you will not be able to create a cover sheet.

---

**Figure 4-8. Package Definition Form With Data Entered for Index Fields**

- 6 When all index data is entered, click Create to trigger the creation of a cover sheet. The selected package type, index field values, and other information will be used to create the cover sheet, which will display when it is created. See Figure 4-5 on page 53.
- 7 Review the cover sheet to ensure that all information is correct, including package type and all index data. The information selected or entered with the Package Definition Form will be shown on the cover sheet for easy review.
  - a If all information is correct, proceed to the next step.
  - b If errors are discovered, click “Create new cover sheet!” in the upper left corner of the display. This will return you to the main Web page, and allow you to select the Package Type and re-enter index data.
- 8 Print the cover sheet from your Web browser. For example, you can click the Print button, or select File | Print from the browser’s menu bar.
- 9 Load the printed cover sheet and your hard copy document into your scanning device’s hopper. Be sure that the cover sheet is positioned to be the first sheet scanned.
- 10 Scan the cover sheet and document.

## Closing the Web Pages

To exit the Ricochet Coversheet Web pages, close the Web browser window. For example, select File | Close from the browser's menu bar. Alternatively, click the Close button in the upper right side of the window.

# Log Files

## Introduction

Ricochet Coversheet copies processing information and error messages to log files when certain events occur. For example, events are logged when package type data is refreshed, or packages are imported into Ascent Capture. As part of your standard system maintenance, you should review, back up, and/or purge log files as appropriate.

## Image Importer Event Log

The Image Importer generates a log file that contains processing results and error messages. The log files are stored by month in files named `RCLog_yymm.txt`, where *yy* is the last two digits of the year and *mm* is a two-digit number representing the month that the information is logged. A new log file is created for each year/month in which processing occurs.

The log file is stored in a location that you specify during installation, or at any time from the Image Importer's Options dialog box. Refer to Chapter 3 for more information about using the Image Importer's Options dialog box.

For the Image Importer event log, you can specify whether basic or verbose messages are logged as shown below:

### **With Basic Logging**

- Messages about refreshing the package types
- "Completed polling" messages
- Number of documents and pages imported
- Errors (if any)

### **With Verbose Logging**

- All items recorded for basic logging
- "Completed importing" messages for each package

Each item logged to the log file is preceded by the date and time the event occurred. Examples of the information stored in a log file is shown below. Due to page size constraints, the examples show some entries on multiple lines. In the log file, each entry is actually logged as a single line of information.

### **Basic Logging**

11/24/01 12:12:53 PM - Refreshed package types.

11/24/01 12:13:39 PM - Completed polling all watched folders. Documents imported: 4; Pages imported: 4.

### **Verbose Logging**

11/24/01 12:12:53 PM - Refreshed package types.

11/24/01 12:13:15 PM - Completed importing package file C:\Chicago Sales\24065205 369235984.tif. Pages imported: 1.

11/24/01 12:13:23 PM - Completed importing package file C:\Chicago Sales\24071734 369235984.tif. Pages imported: 1.

11/24/01 12:13:31 PM - Completed importing package file C:\Houston Shipping\24065049 369235984.tif. Pages imported: 1.

11/24/01 12:13:39 PM - Completed importing package file C:\Houston Shipping\24065129 369235984.tif. Pages imported: 1.

11/24/01 12:13:39 PM - Completed polling all watched folders. Documents imported: 4; Pages imported: 4.

---

**Note** Errors encountered by the Image Importer are logged to the Image Importer event log, as well as the standard Ascent Capture error log. Refer to your Ascent Capture documentation for details about the Ascent Capture log files.

---

## **Ricochet Coversheet Server Log File**

In addition to the Image Importer log file, a separate log is generated by Ricochet Coversheet server activity. The name of this log file is CSWeblog.txt, and it is stored in C:\inetpub\wwwroot\RicochetCoversheet folder on your IIS Web server.

# Troubleshooting Tips

## Introduction

This appendix provides troubleshooting tips for some common problems. It also provides a description of the Error Files folder.

For a complete list of error messages, go to the Kofax Technical Support Web site at:

[http://www.kofax.com/Support/Ascent/ricochet\\_coversheet](http://www.kofax.com/Support/Ascent/ricochet_coversheet)

## Logging In To Ascent Capture

- **Problem:** On start up, the message “Could not log in to Ascent Capture” is shown in the Image Importer’s event log area.

### Cause/Solution

Possible Cause	Solution
The Ascent Capture User Profiles feature is enabled, and an invalid Ascent Capture user name and/or password was specified for the Image Importer.	<p>Specify a valid Ascent Capture user name and password from the Image Importer’s Options dialog box.</p> <p>To do so, select Tools   Options   Server Options tab from the Image Importer’s menu bar. Then, specify a valid user name and password and click OK.</p> <p>To verify user names and passwords, launch the Ascent Capture Administration module and select Edit   User Profiles from the menu bar. If necessary, contact your Ascent Capture system administrator for assistance.</p>

## Package Types Not Available

- **Problem:** Batch classes are not available as package types for remote operators

### Cause/Solution

Possible Cause	Solution
No batch classes are published	<p>Make certain that your batch classes are published.</p> <p>To do so, launch the Ascent Capture Administration module. From the menu bar, select File   Publish. The Publish dialog box will display. Select the desired batch class and click Publish.</p>
No batch classes are available that can be used with Ricochet Coversheet.	<p>Some limitations apply to batch classes that can be used with Ricochet Coversheet. For example, batch classes that contain a required batch field cannot be used with Ricochet Coversheet. Such batch classes will not display for remote operators.</p> <p>Refer to the section <i>Batch Class/Document Class Considerations</i> in Chapter 3 for details.</p>
The Image Importer is not running.	<p>The Image Importer acts as a broker between Ricochet Coversheet and Ascent Capture. If it is not running, no batch class information can be sent to remote operators, and no packages can be imported into Ascent Capture.</p> <p>If Image Importer is not running, start it. From the Start menu, select Ricochet Coversheet   Image Importer.</p>
The Image Importer has not polled since batch classes were published.	<p>New batch class information is refreshed from Ascent Capture at the scheduled polling intervals.</p> <p>To force the polling, select File   Poll Folders from the Image Importer's menu bar.</p> <p>To verify the polling intervals, select Tools   Polling Interval from the Image Importer's menu bar. The Polling Interval dialog box will display with the currently selected polling interval. If desired, you can change the interval.</p>

*Continued on next page*

**Cause/Solution (Continued)**

<b>Possible Cause</b>	<b>Solution</b>
<p>The Ricochet Coversheet Web pages need to be refreshed.</p>	<p>The list of package types available from the Ricochet Coversheet Web pages is automatically populated with current types each time the browser is launched and the Ricochet Coversheet Web pages display. However, once the list is populated for a session, it does not automatically refresh if batch class information changes at the central site.</p> <p>To refresh the list of package types for the Web pages at any time during a session, select View   Refresh from the browser's menu bar.</p>

**Packages Not Imported**

- ▶ **Problem:** Packages are not being imported into the Ascent Capture workflow.

**Cause/Solution**

<b>Possible Cause</b>	<b>Solution</b>
<p>The watched folder does not allow read/write access.</p>	<p>Make certain that your watched folders allow read/write access.</p> <p>To display the properties for a folder, start Windows Explorer and browse to the folder. Right-click the folder name and select Properties. If the “Read only” check box is checked, uncheck it and click OK.</p>
<p>The Image Importer is not running.</p>	<p>The Image Importer acts as a broker between Ricochet Coversheet and Ascent Capture. If it is not running, no batch class information can be sent to remote operators, and no packages can be imported into Ascent Capture.</p> <p>If Image Importer is not running, start it. From the Start menu, select Ricochet Coversheet   Image Importer.</p>

*Continued on next page*

**Cause/Solution (Continued)**

<b>Possible Cause</b>	<b>Solution</b>
Monthly page license is expired.	<p>Make certain that your Ascent Capture Scan license has not expired for the month.</p> <p>To do so, launch the Ascent Capture Scan or Quality Control module from the IIS Web server station and look at the “Remaining” indicator on the Scan panel. Refer to the section <i>Licensing</i> in Chapter 3 for details.</p> <p>At the beginning of each month, your Scan license will reset to your maximum monthly allowance of pages. For additional licensing, contact your Ascent Certified Reseller.</p>
There are no packages from remote sites in the watched folders.	<p>Make certain that the scanning devices used at your remote sites are sending their output to the specified watched folders.</p> <p>To verify the watched folders, select Tools   Options   Watched Folders tab from the Image Importer’s menu bar. The watched folders will be listed on the tab.</p> <p>Refer to the instructions that came with your scanning devices to set output destinations to the desired watched folders.</p>
Package files are sent to the Error Files folder.	<p>Review the Image Importer’s log file to determine if packages have been sent to the Error Files folder on the IIS Web server. Or, check the Error Files folder located in your Ricochet Coversheet installation folder. (The default location is C:\Program Files\Ricochet Coversheet\Error Files on your IIS Web server.)</p> <p>Refer to the section <i>Error Files</i> on page 65 for more information.</p>

**Package Files Left in Watched Folders**

- **Problem:** Package files are delivered from remote sites, but are being left in the watched folders

**Cause/Solution**

<b>Possible Cause</b>	<b>Solution</b>
Package files contain only one page.	The Image Importer ignores packages in the watched folders with less than two pages. This is because some scanning devices do not lock their output as it is created. Image Importer will recheck these files at the next polling time.

## Error Files

Packages that cannot be imported into Ascent Capture are automatically moved to an Error Files folder in your Ricochet Coversheet installation folder on your IIS Web server.

For example, package files that contain an expired cover sheet will be moved into the Error Files folder. This may happen if your remote operator fails to scan a cover sheet and document before midnight of the day the cover sheet was created. In this way, you can monitor the packages sent from your remote sites to ensure that all batches are imported into the Ascent Capture workflow as necessary.

---

**Note** The Error Files folder is automatically created when you install Ricochet Coversheet. The default installation path is C:\Program Files\Ricochet Coversheet\Error Files on your IIS Web server.

---

You can view the TIFF files in your Error Files folder with any TIFF viewer. The cover sheet contained in the TIFF file provides the IP address of the remote station that originated the package. You can use this information to request that the package be regenerated from the remote site.

In addition, if files are moved to the Error Files folder, an error message will be logged to the Image Importer's log file. For example, if an expired cover sheet is found in a watched folder, a message similar to the following will be logged:

```
An error has occurred. The package file [path/file name] contains
an invalid or expired cover sheet. [pointer to index data] The
package must be regenerated.
```

The *path/file name* in the error message reflects the original path to the watched folder where the file was delivered from the remote site. The *pointer to the index data* is the file name of the XML file that contains the index data entered by the remote operator.



# Kofax Technical Support

## Introduction

Kofax provides a variety of support options to help you get the most from your Ricochet products. This appendix describes these options.

## First Line Support

If you need assistance, you should first contact your Ascent Certified Reseller. Your reseller has been trained to install and support your Ricochet products.

## Internet Support

For up-to-date support information, visit the Kofax Web site at [www.kofax.com](http://www.kofax.com) and go to the Support page. Select your product from the list to access technical information specific to your product, such as current revision levels, the latest drivers and software patches, Frequently Asked Questions (FAQs), and technical tips.

## E-Mail Support

You can send your support questions to the Kofax Ascent Support group via e-mail and receive a response within one business day. The address is:

[ascent@kofax.com](mailto:ascent@kofax.com)

## Pay-As-You-Go Support

You can purchase support credits from the Kofax Technical Support page or from your Ascent Certified Reseller. These credits allow you telephone access to the Kofax Ascent Support group. To find out more, visit the following Web page:

<http://www.kofax.com/support/ascent/capture/credits.asp>

## Contact Numbers

Resellers and users who have purchased Ascent support credits can contact the Ascent support group at the numbers below. Otherwise, contact your Ascent Certified Reseller for support. Please have the following information available, as necessary:

- Ascent Capture software version
- Ricochet Coversheet software version
- IIS software version
- Operating systems and service packs (if any) used for the stations on which the following are installed:
  - ✓ Ascent Capture server and clients
  - ✓ Ricochet Coversheet on your IIS Web server
- Browser(s) used at the remote stations
- Scanning devices (such as MFPs) used to deliver packages to your watched folders
- Network configuration
- Copies of your error log files
- Reproduction scenarios for problems or questions

### Headquarters



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# Glossary

### **Anonymous access**

Allows remote access to a computer by using the `IUSR_computername` or guest account. Remote users can connect without a user name and password. The account typically has security restrictions that limit the type of Web content users can access.

### **Bar code**

A machine-readable pattern of dark and light elements in which data is encoded. The data can include numbers, alphanumeric characters, special characters, and other information.

With Ricochet Coversheet, bar codes are used to encode information on the cover sheets created by remote users. The Image Importer uses the encoded data when it processes the packages at the central site.

### **Batch class**

A batch class describes how batches will be processed with Ascent Capture. It defines settings such as which queues a batch will flow through in Ascent Capture, how images will be separated, and more. Each batch class can contain one or more document classes, which in turn can contain one or more form types. For Ricochet Coversheet, *package types* are a unique combination of batch class, document class, and form type.

Note that batch classes are defined in the Ascent Capture Administration module. Refer to your Ascent Capture documentation for more information.

### **Batch field**

A data field associated with a batch. For Ricochet Coversheet, batch fields are not displayed for remote operators. In addition, batch classes that contain required batch fields will not be available for use with Ricochet Coversheet.

Note that batch fields are defined for batch classes in the Ascent Capture Administration module. Refer to your Ascent Capture documentation for more information.

### **Browser**

See Web browser.

### **Client/Server configuration**

An Ascent Capture installation whereby the Ascent Capture database and other files are installed on a server station, and the Ascent Capture modules run on client stations. The server station and the client stations are connected via a LAN. The client stations share the database and files installed on the server.

For Ricochet Coversheet, Ascent Capture must be installed as a client or standalone station on your IIS Web server.

### **Cover sheet**

A printed form that contains information about a document to import into Ascent Capture. Remote operators use the Ricochet Coversheet Web pages to select the type of document to process and enter index data for the document. Then, Ricochet Coversheet provides the cover sheet to be printed and scanned with the document at the remote site. Some of the information entered by the remote operator is encoded in bar codes that are read at the central site for use by the Image Importer.

### **Document class**

A document class describes how a particular type of document will be processed in Ascent Capture. It defines settings such as index fields, attributes for the index fields, and more. A document class can contain one or more form types. For Ricochet Coversheet, package types are a unique combination of batch class, document class, and form type.

Note that document classes are defined in the Ascent Capture Administration module. Refer to your Ascent Capture documentation for more information.

**eDocuments**

Non-image files. Some examples are: Microsoft Word documents, Audio Video Interleaved (AVI) files, and text files.

**Form type**

A form type defines a unique form, such as an order form from a particular vendor or a medical form from a particular hospital. For Ricochet Coversheet, package types are a unique combination of batch class, document class, and form type.

Note that form types are defined in the Ascent Capture Administration module. Refer to your Ascent Capture documentation for more information.

**Hardware key**

A device that plugs into a computer's parallel port to prevent the unlicensed use of software. For Ricochet Coversheet, an Ascent Capture Scan hardware key must be attached to your IIS Web server.

**Hidden index field**

An attribute for an index field that causes the field to be hidden from operators. Ricochet Coversheet honors the "Hidden" attribute and does not display hidden fields to remote operators.

Note that index fields are defined for document classes in the Ascent Capture Administration module. Refer to your Ascent Capture documentation for more information.

**ICR**

Intelligent Character Recognition. It is the ability of software to recognize hand-printed characters and translate them into computer-readable data.

**Index field**

A data field associated with a document, and typically used as a keyword for document retrieval. With Ricochet Coversheet, remote operators use the Package Definition Form to enter values for index fields, which are then delivered to the central site as part of a document package.

Note that index fields are defined for document classes in the Ascent Capture Administration module. Refer to your Ascent Capture documentation for more information.

## **IIS**

See Microsoft Internet Information Server.

## **IIS Web server**

This is the workstation on which the Ricochet Coversheet server and Image Importer are installed. The station must be configured as an IIS Web server. For Ricochet Coversheet, Ascent Capture must also be installed on this workstation as a client or standalone station.

## **LAN access**

Local Area Network access. Access to a group of interconnected computers.

## **Microsoft Internet Information Server (IIS)**

A network file and application server for the Microsoft Windows NT Server, Windows 2000 Server, or Windows 2000 Advanced Server network operating systems. It is the base component for building an Internet or Intranet server solution. Refer to your Microsoft documentation for details.

## **Multi-Function Peripheral (MFP)**

A single device that functions as two or more of the following: printer, scanner, copier, and/or fax machine. MFP devices are typically network aware, and provide an FTP server that you can configure to direct output to a URL that you specify. Ricochet Coversheet supports MFP devices that can generate multi-page TIFF images with CCITT Group 3 or Group 4 compression.

For Ricochet Coversheet, you must configure your MFP devices to output to a folder location that is accessible to the Image Importer.

## **OCR**

Optical Character Recognition. It is the ability of software to recognize printed characters and translate them into computer-readable data.

## **OMR**

Optical Mark Recognition. It is the ability of software to recognize marked areas on forms and convert the data to a format that can be processed by the software. The marks are typically created filling in a circle (or bubble) or marking a check in a check box on a preprinted form.

**Package Definition Form**

A form available from the Ricochet Coversheet Web pages that allows remote operators to enter index data for a document and create a cover sheet.

**Package type**

A package type is a unique combination of Ascent Capture batch class, document class, and form type.

**Polling interval**

Polling refers to the process of periodically checking for packages to process from remote operators, and new batch class information from Ascent Capture. *Polling interval* refers to the amount of time between polling times.

**Proxy server**

A firewall component that manages Internet traffic to and from a local area network (LAN).

**Quality Control module**

An Ascent Capture processing module that is used to visually check the quality of each batch and ensure that document pages are legible. It can be used as an explicit queue for all batches, or as an exception queue for batches that contain errors.

**Standalone**

An Ascent Capture installation whereby the Ascent Capture database and all Ascent Capture modules run on one PC.

**Sticky index field**

An attribute for an index field that allows the value for the field to be carried over to the next document. The Ricochet Coversheet Web pages treat sticky fields as if the “Sticky” attribute is set to False. No “sticky” values will be preserved from one package to the next.

Note that index fields are defined for document classes in the Ascent Capture Administration module. Refer to your Ascent Capture documentation for more information.

**TCP/IP protocol**

Transmission Control Protocol/Internet Protocol. A protocol for communications between computers.

### **User profiles**

Ascent Capture “accounts” defined for users. They specify Ascent Capture user privileges, such as module access and batch class access. User profiles are defined from the Ascent Capture Administration module.

### **Validation module**

An Ascent Capture processing module that is used to enter or validate data associated with a document.

### **Web browser**

A software application used to find and display Web pages and applications. Remote users access the Ricochet Coversheet Web pages with a Web browser.

### **XML**

Extensible Markup Language.

### **Zone**

An area on an image that you want to process in some way.

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