

LEVERENT

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Leverent has created the netAgility™ Kofax Release Script for Microsoft Office SharePoint Server (MOSS) 2007 to act as a “bridge” between Kofax imaging solution and Microsoft’s SharePoint technologies. This “bridge” allows customer’s to leverage the “best of breed” imaging capabilities of Kofax while utilizing the advanced workflow, search, and repository capabilities of the SharePoint environment.

The netAgility Kofax Release Script 2.0 which replaces the earlier version that worked with the earlier version of SharePoint, leverages new capabilities of MOSS 2007, including SharePoint Content Types and Windows Workflow. In addition, the release script provides:

- ★ Flexible meta-data mapping from Kofax to SharePoint document library properties
- ★ Use of MOSS 2007 Content Types and mapping to Kofax Document Classes
- ★ Basic type checking for Meta-Data
- ★ Ability to utilize Microsoft Windows Workflow Foundation (WWF) and SharePoint workflow for documents after scanning

Once captured, and tagged with appropriate meta-data, users can work with the documents using the standard easy-to-use SharePoint interface. This includes:

- ★ Document Alerts
- ★ Full text searching of OCR’d Text
- ★ Meta-Data (or Property-Based) Searching
- ★ Grouping and Filtering Views Based on Document Properties and Dates
- ★ SharePoint Based Document Level Security

Document scanned via Kofax can be provided to SharePoint in a variety of formats, including:

- ★ TIFF
- ★ PDF (Image Based)
- ★ PDF (Text Under Image) \* RECOMMENDED FORMAT
- ★ PDF (Text Over Image)

**MOSS Release Setup**

Batch Class: Leverent  
 Document Class: Lease Document  
 Release Script Name: Lease Document Library

Connection Settings | **Document Settings** | Document Storage

Document Library: Lease Documents  
 Content Type: Lease

Document Properties

Document Metadata	Ascent Values
Name ( * )	{Batch Class Name}
Title	
Lease: LeaseAdminCd	
<b>Lease: LeaseNo</b>	
(none)	Unlink Field
(none)	<b>Index Fields</b> ▶ LeaseNumber
(none)	Ascent Capture Values ▶
(none)	Text Constant
(none)	(none)

(\* ) indicates Required field

OK Cancel

## Easy-To-User Interface

The release script is added as a “plugin” to the Kofax Administration Module, and provides an easy-to-use interface. This interface sits inside the Kofax UI and mirrors the interfaces used for other Kofax tools and release script. This interface provides a point-and-click method to map properties defined against a scanned document to corresponding properties inside a SharePoint document library.

## Architecture

The netAgility Kofax integration consists of 2 primary components, the Release Script and the Document Processing Web Service for SharePoint.

## Release Script Architecture

The Release Script Component provides all UI functionality, and all Kofax based processing functionality needed to handle the scanned documents. Within the Release Script there are 2 sub-systems : the Administration UI which provides the User Interface for mapping meta-data to SharePoint, and the Processing Sub-System which handle the actual document generation, assigning meta-data values, and adding documents to SharePoint

## Document Processing

The Document Processing Web Service provides support functionality for the Release Script and is deployed directly to the Front-End Web Servers for MOSS 2007. This web service is secured, and provides the ability to quickly and easily interact with the document repositories in SharePoint. This includes the ability to add documents, query document libraries and more.

