

ASCENT



Installation Road Map



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Ascent Capture®

The Operating System of Capture

Version 5.0

Installation Road Map

Text Version

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Introduction

This document contains instructions for installing Ascent Capture 5.0, including:

- Instructions for installing Ascent Capture 5.0 as a standalone installation
- Instructions for installing Ascent Capture 5.0 in a client/server configuration
- Basic information about installing other Kofax products, such as VirtualRescan (VRS) and Adrenaline hardware accelerators, for use with Ascent Capture 5.0
- Late-breaking information not provided in the chart version of the Ascent Capture 5 Installation Road Map (PN 10000892-000 Revision A).

Note The information in this document supercedes the chart version of the Ascent Capture 5 Installation Road Map (PN 10000892-000 Revision A). For additional technical information about Ascent products, visit the Kofax Web site at www.kofax.com and go to the Technical Support page. The Kofax Technical Support page provides product-specific information, such as current revision levels, the latest drivers and software patches, Frequently Asked Questions (FAQs), and technical tips. In addition, updates to product release notes and installation instructions (if any) are available from the Technical Support page.

Related Documentation

For additional information, please refer to:

Getting Started with Ascent Capture 5, PN 10300262-000, Revision A, particularly Chapter 2
Installing Ascent Capture

Ascent Capture v5.0 Configuration Guide, PN 10300203-000 Revision F

Getting Started with Software VRS, v1.2, PN 10300244-000 Revision A (If applicable)

Hardware VRS documentation that was included with your scanner (if applicable)

Your Ascent Capture 5.0 printed documentation is available in your software package, and in PDF format from the Kofax Web site.

Overview

This section provides you with an overview of the installation process. For Ascent Capture 5.0, it is important that you follow the installation steps exactly in the order given.

Important Installation Notes

This section contains important notes that you should review before installing Ascent Capture 5.0. Also, when upgrading an existing installation, please note the following important points:

- On client/server installations, first upgrade the server from the Ascent Capture CD, and then upgrade all the clients.
- All batches must be completed before upgrading.
- If you are upgrading or updating, you do not need to change or adjust your scanner, source, or accelerator settings.

Administrative Privileges

In order to install Ascent Capture 5.0 on a Windows NT or Windows 2000 machine you must have full administrative privileges.

Backup Copies

If you are upgrading or updating an existing installation of Ascent Capture, it is strongly suggested that you back up your Ascent server folder (if you have one) and your temporary image folder immediately prior to installation.

Long File Names

You must install Ascent Capture on a drive that supports long file names. This could be an issue, for example, if you are on a Novell Netware network.

TEMP and TMP Environment Variables

Before you install or run Ascent Capture 5.0, make certain that:

- The TEMP and TMP environment variables are defined.
- The TEMP and TMP folders exist. If necessary, you must create them.
- The paths for the TEMP and TMP environment variables do not exceed 21 characters.

Warning If your TEMP or TMP environment variables do not comply with these guidelines, you will not be able to install or run Ascent Capture 5.0.

► To reset the TEMP or TMP paths

- **For Windows NT**, select Control Panel | System Properties | Environment. Reset the TEMP and TMP paths in the User Variables list.
- **For Windows 2000**, select Control Panel | System | Advanced, and then click the Environment Variables button. When the Environment Variables dialog box opens, reset the TEMP and TMP paths in the User Variables list.
- **For Windows 98 and Me**, the TEMP and TMP variables are set in the Autoexec.bat file. If changes are required, use Notepad to edit Autoexec.bat.

For additional information regarding the TEMP and TMP environment variables, refer to the documentation for your operating system.

Upgrade or Reinstall Ascent Capture 5.0

The installation wizard will detect an existing version of Ascent Capture 3.x or higher and prompt you for the installation options you want. When this happens you will see a screen similar to the following:

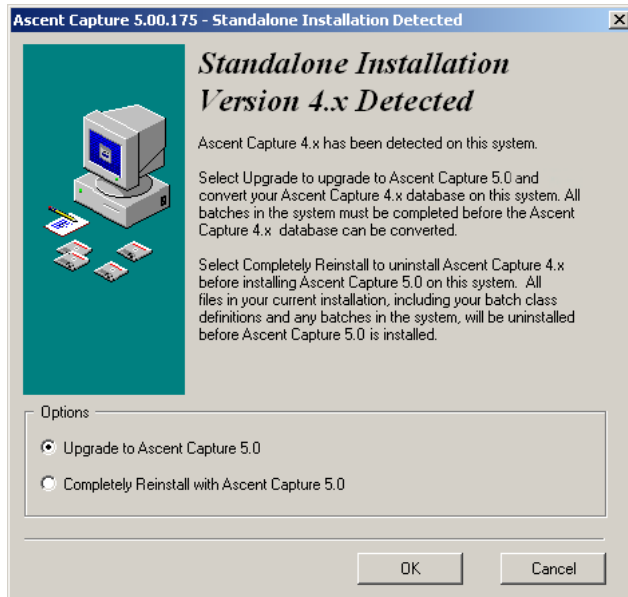


Figure 1. Standalone Installation Detected Screen

Your choices are to Upgrade to Ascent Capture 5.0 or to Completely Reinstall with Ascent Capture 5.0. Here are the differences:

- Upgrade to Ascent Capture 5.0:
 - ✓ Preserves your current batch classes, profiles, and other settings
 - ✓ Preserves your site and station IDs
 - ✓ Cannot be used if you have active batches
- Completely Reinstall with Ascent Capture 5.0:
 - ✓ Removes all current batch classes and other settings
 - ✓ Automatically uninstalls your current version
 - ✓ Automatically removes all active batches

If you have already installed Ascent Capture 5.0 and are installing it again for some reason, the first option will begin with “Update” instead of “Upgrade.” Update behaves just like an Upgrade, specifically:

- Update Ascent Capture 5.0:
 - ✓ Preserves your current batch classes, profiles, and other settings
 - ✓ Preserves your site and station IDs
 - ✓ Cannot be used if you have active batches

Installation Instructions

The following instructions do not describe every installation screen you may see, nor do they cover every decision you may be asked to make. Instead, the focus is on major milestones, key decisions, or possible areas of confusion.

The installation wizard screens contain additional information that will guide you through the installation process. Be sure to read them carefully before proceeding with each step.

Major Steps

Following are the major steps you may need to take when installing Ascent Capture 5.0. Depending on the products you have, it may not be necessary to perform all of these steps.

- Step 1** Uninstall other Kofax Products.
- Step 2** Install Ascent Capture 5.0.
- Step 3** Install other Kofax products including VRS or other accelerators (optional).
- Step 4** Install Adrenaline Hardware Runtime v3.6 (AHRT3.6).
- Step 5** Set up source devices (optional).

Step 1: Uninstall Other Kofax Products

You may have, or plan to install, other Kofax products on your machine. In such cases, some Kofax products share files among themselves. This not only saves disk space, but also ensures that all the products have access to the most current files. Because these files must be located in shared folders, Kofax products must be installed in a particular order.

Uninstalling these other Kofax products before you install Ascent Capture will ensure that files are installed to the correct location. After you have installed Ascent Capture, your existing Kofax products will find the same folders that Ascent Capture is using when you reinstall them.

If you already have a working Ascent Capture installation, there is no need to uninstall your other Kofax products. When you upgrade or update Ascent Capture, the installation program will use all your current settings as well as the existing shared folder.

However, if you do not have an installed version of Ascent Capture, and if you have any of the following Kofax products installed, you should uninstall them, including software drivers, prior to installing Ascent Capture 5.0.

- Software VRS 1.2
- Hardware VRS
- Adrenaline Accelerator
- KF Accelerator

For details about uninstalling any of these items, please refer to the documentation provided with the product.

Step 2: Install Ascent Capture 5.0

You can install Ascent Capture 5.0 either as a standalone workstation or as part of a client/server environment.

Standalone Installation

► To install Ascent Capture 5.0 on a standalone workstation

- 1 At a workstation, shut down any applications (including the Control Panel, virus detection software, and toolbars) that might be running.
- 2 Insert the Ascent Capture 5.0 CD into your CD-ROM drive. The CD supports AutoPlay, so the installation will automatically begin. (If it doesn't, run Setup.exe from the CD.) The initial Welcome screen will be displayed.
- 3 From the Welcome screen, click OK.
- 4 Follow the instructions on your screen to install the software.

Note In some cases, system files may need to be updated and you may be prompted to restart the workstation. If this occurs, the installation process will automatically resume once your workstation has been restarted.

- 5 When prompted for the installation type, select Standalone and click Next.
- 6 When prompted to restart your workstation, click OK.

Client/Server Installation

Client/server installations are more involved than standalone installations. Carefully review these instructions.

Server Installation

Ascent Capture server requires that it be installed to a shared file folder, which must be accessible by each client. You must use a UNC path or a mapped drive to access this folder from the clients. Moreover, the path specified from each client must be exactly the same. To ensure that the server is visible from the clients, you must install Ascent Capture 5.0 to your network server before you can install the Ascent Capture client workstations.

Furthermore, you must use the Ascent Capture 5.0 installation CD from an Ascent Capture client workstation when installing Ascent Capture server. Otherwise the installation program will not detect the earlier version and current users will lose any existing batch classes and other settings.

► To install Ascent Capture 5.0 as a server installation

- 1 At a client workstation, shut down any applications (including the Control Panel, virus detection software, and toolbars) that might be running.
- 2 Insert your Ascent Capture CD into the CD-ROM drive of the client workstation. The CD supports AutoPlay, so the installation will automatically begin. (If it doesn't, run Setup.exe from the CD.)
- 3 From the Welcome screen, click OK.

- 4 Follow the instructions on your screen to install the software.

Note In some cases, system files may need to be updated and you may be prompted to restart the workstation. If this occurs, the installation process will automatically resume once your workstation has been restarted.

- 5 When prompted for the installation type, select Server and click Next.
- 6 When prompted for a destination, specify the target drive and folder on your server machine. Make sure you choose an installation path that is accessible to all your client workstations as a permanently mapped drive or UNC path.

Client Installation

After you have installed Ascent Capture 5.0 as a server, you can install the clients.

Note To install Ascent Capture 5.0 as a client, you must be at the client machine. At the client, permanently map a drive or define a UNC path to the server folder that contains Ascent Capture 5.0, and then run the installation application.

► To install Ascent Capture 5.0 on a client workstation

- 1 At a client workstation, shut down any applications (including the Control Panel, virus detection software, and toolbars) that might be running.
- 2 Select Start | Run from the Windows task bar and run Setup.exe from the folder where you installed your Ascent Capture 5.0 server software. (Setup.exe resides in the WrkInst subfolder.)
- 3 From the Welcome screen, click OK.
- 4 Follow the instructions on your screen to install the software.

Note In some cases, system files may need to be updated and you may be prompted to restart the workstation. If this occurs, the installation process will automatically resume once your workstation has been restarted.

- 5 When prompted for a destination, specify a target folder on your client workstation.
- 6 When prompted to restart your workstation, click OK.
- 7 Attach the appropriate hardware keys.

Step 3: Install Other Kofax Products (Optional)

If you have any of the following Kofax products, you can install them now. Refer to the documentation provided with each product for details.

- Software VRS v1.2
- Hardware VRS
- Adrenaline Accelerator
- KF Accelerator

Note that VRS (either software or hardware) will automatically find and install some files in the Ascent Capture\ImgCtrls folder.

Warning You cannot install Hardware VRS and Software VRS v1.2 on the same machine.

The following sections describe how to install a hardware accelerator on your workstation and update your hardware drivers.

Windows NT

Follow these steps to install an accelerator.

Warning When installing an Adrenaline or KF accelerator, the drivers are shipped and installed with Ascent Capture. Do **not** use the CD provided with the accelerator when installing one of these accelerators to run with Ascent Capture.

Adrenaline hardware accelerators

► To install a new accelerator

To insert a new accelerator in your hardware, refer to the documentation that came with your accelerator for details. Do **not** install the drivers from the CD provided with the accelerator. Ascent Capture will automatically install the necessary drivers for you.

KF-Series hardware accelerators

► To install a new accelerator

- 1 From the Control Panel, run KCM (32-bit).
- 2 Click Next.
- 3 Make sure your accelerator is listed in the list of accelerators. If it isn't:
 - a Click Add. The Accelerator Properties dialog box will be displayed.
 - b Select your Engine Type (for example, KF9275).
 - c Select ISA as your Bus Type.
 - d Select the I/O address and Interrupt settings. You should check NT Diagnostics to find available I/O addresses and IRQ settings, and then specify them in KCM (32 bit). Make note of the settings you select in this step for use in step 5b of this procedure.
 - e Click OK. Your settings will be shown in the list of Configured Accelerators.
- 4 Click Next and follow the instructions on your screen to finish.

- 5** Inserting the accelerator:
 - a** Shut down your workstation.
 - b** Make sure the accelerator's jumpers match the settings you noted in step 3d above. Refer to the documentation that came with your accelerator for details on jumpers.
 - c** Install the accelerator in your workstation. Refer to the documentation that came with your accelerator for details.
 - d** Start your workstation.

Windows 2000/98/Me

Follow these steps to install a new accelerator or update an existing accelerator.

Note KF accelerators are not supported on Windows 2000, Windows 98, or Windows Me.

Adrenaline hardware accelerators

► To install a new accelerator

- 1** Shut down your workstation.
- 2** Insert your accelerator. Refer to the documentation that came with your accelerator for details.
- 3** Start your workstation. Windows will automatically detect your new accelerator and display the New Hardware Found wizard.
- 4** Select "Driver from disk provided by hardware manufacturer" and click OK. The Install From Disk dialog box will be displayed.
- 5** Browse to the driver:
 - a** For Windows Me, look in Ascent\ImgCtls\Bin.
 - b** For Windows 98, insert your Ascent Capture CD into your CD-ROM drive, and browse to <your CD drive>\Vxd\Kofax.inf.
- 6** Click OK and follow the instructions on your screen to finish.

Step 4: Install AHRT3.6

You may need to install Adrenaline Hardware Runtime 3.6 (AHRT3.6) after you have installed Ascent Capture 5.0. If installed, it must come last in the installation process.

Guidelines for installing AHRT3.6 are:

- If you have installed Hardware VRS, then you *must* always install AHRT3.6.
- If you do not have Hardware VRS then the installation of AHRT3.6 is optional. This version of AHRT includes support for some new scanners and drops support for older non-VRS scanners. Check the scanner configurator at the Kofax Web site (www.kofax.com) for details.

Note The following procedure assumes that you are installing AHRT3.6 from the Kofax Web site.

► **To install AHRT 3.6**

- 1 Visit the technical support section of the Kofax Web site and navigate to the driver download area.
- 2 Download AHRT360.exe and run it. This self-extracting application will install a number of files to your hard drive
- 3 Run Setup.exe and follow the instructions on your screen to install the software.

Warning Be sure to specify the already existing Ascent Capture\ImgCtrls folder as the destination when prompted. If you select a different folder, Ascent Capture will not function properly.

- 4 When prompted to restart your workstation, click OK.

Step 5: Set Up Source Devices (Optional)

The Kofax Source Manager (KSM (32 bit)) allows you to define and configure source devices (such as non-VRS scanners) and assign aliases to them. Doing so removes the responsibility for specifying engine/scanner configurations from your scan operators, and it simplifies device selection during batch processing.

Please refer to the scanner configurator at the Kofax web site (www.kofax.com) for additional information about scanners and drivers.

When you install VRS the source device is automatically configured for you. Therefore, you only need to perform this step at workstations with non-VRS scanners or if you want to use an import source not provided with Ascent Capture. KSM (32 bit) is added to the Windows Control Panel when you install Ascent Capture 5.0. It is not available from within Ascent Capture 5.0.

A source device is a combination of the following:

- Engine specification (such as a Kofax accelerator or software engine)
- Source types (such as scan or import)
- Scanner make and model (for scanner source devices)
- Engine-specific information (such as ISIS drivers for SCSI scanners)
- Advanced source properties - optional (such as image enhancement and others)

Note Ascent Capture comes with some source devices already configured. You can select any source as your default, but **do not change the settings for the pre-configured sources and do not delete them.**

► To create a source device

- 1 From the Windows Control Panel, select KSM (32-bit). The initial Kofax Source Manager dialog box will be displayed.
- 2 Select Next. A dialog box similar to the following will be displayed.

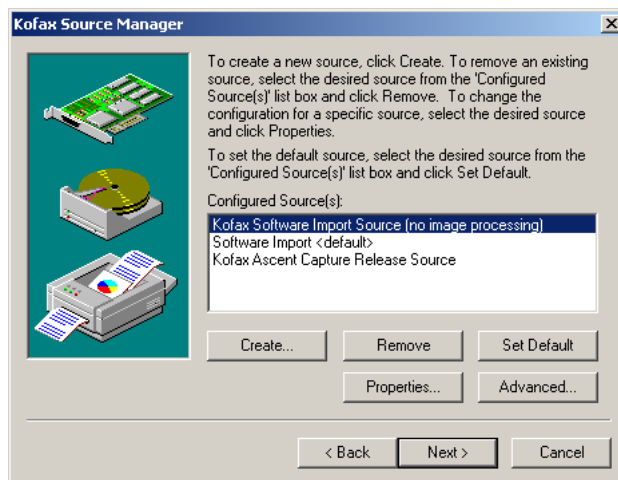


Figure 2. Kofax Source Manager

- 3 Click Create. A dialog box similar to the following will be displayed.

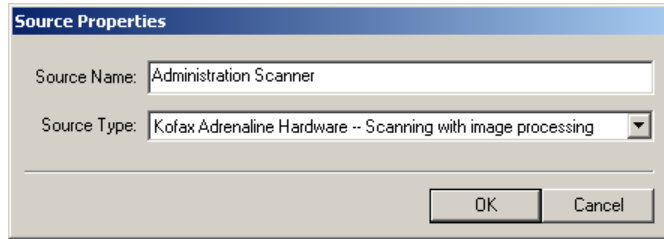


Figure 3. Source Properties Dialog Box

- 4 Enter a source name. The name will become the alias for the source device, and will be available from Ascent Capture. The name should be meaningful to your operators.
- 5 Select a source type from the drop-down list.
- 6 Click OK. For scanner source types, a dialog box similar to the following will be displayed. (The dialog box varies with the source type you choose.)

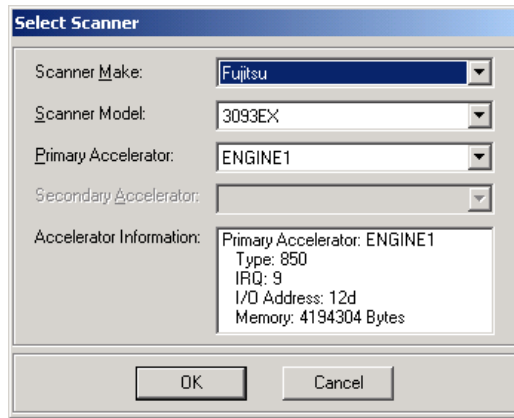


Figure 4. Select Scanner Dialog Box

- 7 Select a scanner or engine as appropriate and click OK. The initial Kofax Source Manager dialog box will be redisplayed with your new source in the list of configured sources.
- 8 Click Next to continue. Or, you can do the following:
 - a To create another source device, repeat steps 3-7.
 - b To remove a source device, select a source and click Remove.
 - c To set a default source device, select a source and click Set Default.
 - d To display the properties for a source device, select a source and click Properties.
 - e To set advanced features for a source device, select a source from the list of configured sources and click Advanced. The Advanced Source Properties dialog box will be displayed, and you can select the desired options.
- 9 Click Finish and follow the instructions on your screen to finish.

Appendix A - Kofax Technical Support

Kofax provides a variety of support options to help you get the most from your Ascent 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 Ascent products.

Internet Support

For up-to-date support information, visit the Kofax Web site at 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

Pay-As-You-Go Support

Support credits allow you telephone access to the Kofax Ascent Support group. To find out more, contact your Ascent Certified Reseller or visit the following Web page:

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

Kofax Scanner Configurator

For a current list of scanners supported by Ascent Capture, visit the Kofax Web site at www.kofax.com to use the Scanner Configurator. From the home page or the Kofax Technical Support page, select Scanner Configurator. Then, select your applicable Ascent Capture version.

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
- Kofax accelerator type, amount of on-board memory, I/O address and interrupt settings (available via the Kofax Configuration Program in the Windows Control Panel)
- Scanner make and model
- Copies of your Autoexec.bat, Config.sys and error log files
- Network configuration
- Client configuration

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