



Administration and User Guide

Overview

The SmartSearch XML Transform is an XML formatting utility designed to facilitate automated import and indexing of data and documents into SmartSearch ECM. The power of XML Transform is its ability to format virtually any XML data into a format that may be imported both easily and automatically into SmartSearch. With this ability, any document capture device or software solution that can generate images with a corresponding XML file can integrate directly into SmartSearch with very little effort.

The power of XML Transform is in the use of external XSL (Extensible Stylesheet Language) files that can quickly be tuned and customized to work against any XML output. Out of the box, XML Transform ships with four XSL files for processing data from various sources. These include:

Objectif Lune PlanetPress

Muratec ScanTag

Kofax Capture

eCopy ShareScan

Remember that XML Transform is not limited to just these four sources. Anything with the ability to generate images with XML data can be managed. Simply create a new XSL file to handle the conversion, or contact Square 9 Softworks for support on developing additional XSL transforms.

Installation

XML Transform runs as a Windows™ service and once configured and registered, will process XML data automatically and unattended. Note that the service, “SSXMLTRANSFORM” will be installed automatically by the XML Transform installer, but will not be started automatically. The service must be started prior to attempt to process any files.

**NOTE: Windows™ services run in the context of a predefined user, not the user you are logged into the workstation or server as. XML Transform is set to run in the context of the Local System Account by default, which should have full permissions to anything on the local workstation or server. Should a Watch Directory or XSL File path be defined on a path that is not local to the server or workstation where XML Transform is running, the service will need to be configured to run as a user with proper permissions to those resources. Modify rights are required on the Watch Directory location. Contact your network administrator if you need to alter this account.*

Administration

XML Transform is configured from the Transform Configuration program. Transform Configuration is available from the XML Transform folder in the SmartSearch program group from the Start menu. Clicking the Transform Configuration icon will start the configuration program as seen below in Figure 1.

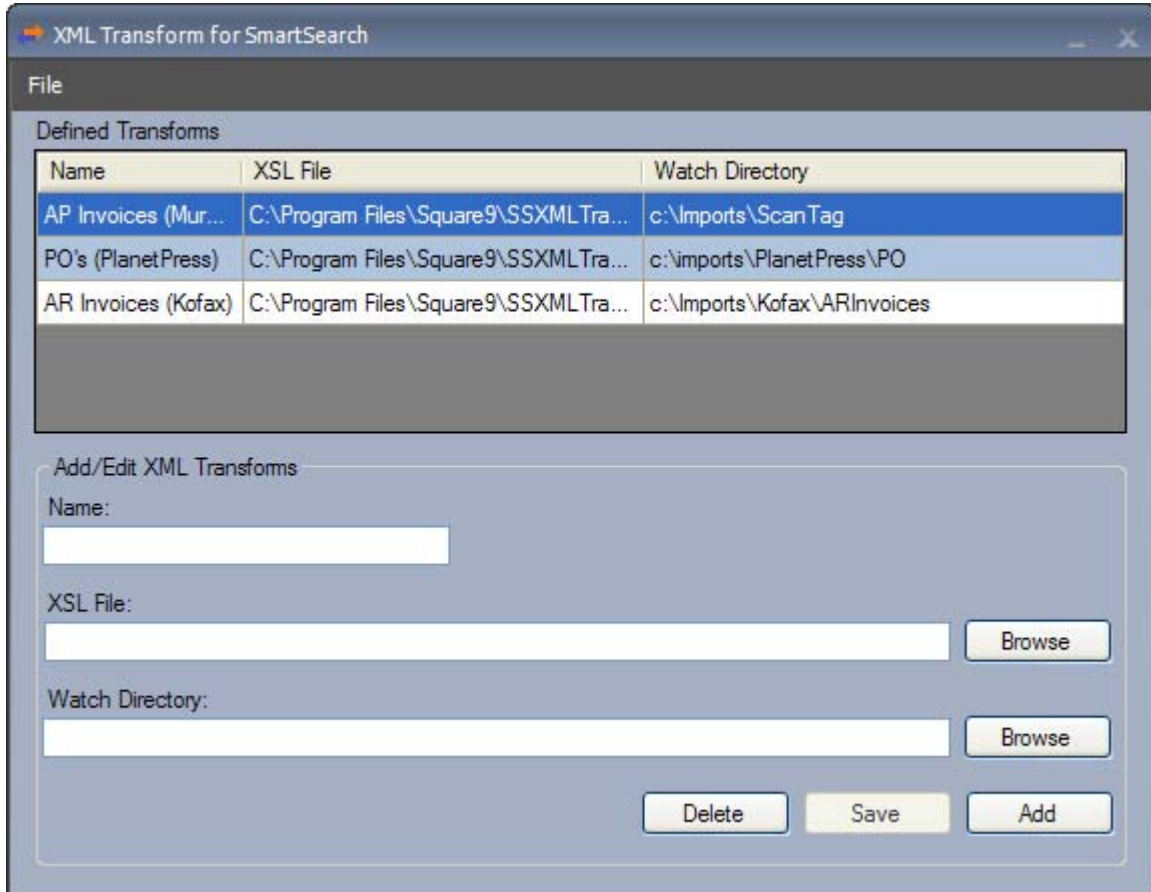


Figure 1: SmartSearch XML Transform Configuration Screen

Registration

XML Transform can be setup prior to registration but no XML will be processed until the application is registered with Square 9 Softworks. To register your software, choose Register from the File menu. The registration screen in Figure 2 will be displayed. Once you have your software's Unique Identifier call the registration line at 203-789-0889 Option 1 to activate your software.

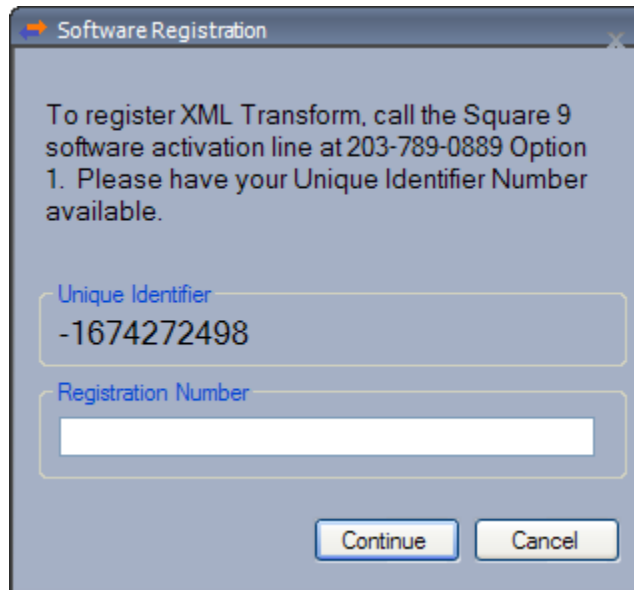
A screenshot of a software registration dialog box titled "Software Registration". The dialog box has a blue header bar with a small orange icon on the left and a close button (X) on the right. The main content area is light blue and contains the following text: "To register XML Transform, call the Square 9 software activation line at 203-789-0889 Option 1. Please have your Unique Identifier Number available." Below this text are two input fields. The first is labeled "Unique Identifier" and contains the text "-1674272498". The second is labeled "Registration Number" and is currently empty. At the bottom of the dialog box are two buttons: "Continue" and "Cancel".

Figure 2: XML Transform Registration Screen

Note that the registration of XML Transform is machine based. Should you need to reinstall XML Transform on a different workstation or server; the software will need to be reregistered.

Setup

The Transform Configuration dialog consists of two sections. The first, “Defined Transforms”, is a list of all defined and active transforms that XML Transform is configured to use and is illustrated in Figure 3. Select an item in this list to edit an existing transform, make a copy of a transform, or delete a transform. Note that this list will be empty until you add at least one transform.

Name	XSL File	Watch Directory
AP Invoices (Muratec)	C:\Program Files\Square9\SSXMLTra...	c:\Imports\ScanTag
PO's (PlanetPress)	C:\Program Files\Square9\SSXMLTra...	c:\Imports\PlanetPress\PO
AR Invoices (Kofax)	C:\Program Files\Square9\SSXMLTra...	c:\Imports\Kofax\ARInvoices

Figure 3: Defined Transforms

The Defined Transforms list contains 3 columns:

- Name – The user defined name of the transform. This name is used only to help the user easily identify the transform and what it is used for.
- XSL File – The file path and name of the XSL file used when XML files are processed by this transform. XML Transform ships with four transforms and are install by default to C:\Program Files\Square9\XMLTransform\XSLT.
- Watch Directory – The file path where your capture hardware or software will output its XML. One transform entry can monitor only one watch directory. If you need to monitor multiple paths, make a copy of the transform by selecting it and altering its properties.

The second section, “Add/Edit XML Transforms”, is where all additions, deletions, and modifications of the items in the Defined Transforms list are performed. Illustrated in Figure 4, this section provides data entry fields for the three elements of a transform defined above.

The dialog box titled "Add/Edit XML Transforms" contains the following elements:

- Name:** A text input field.
- XSL File:** A text input field with a "Browse" button to its right.
- Watch Directory:** A text input field with a "Browse" button to its right.
- Buttons:** "Delete", "Save", and "Add" buttons are located at the bottom of the dialog.

Figure 4: Add/Edit XML Transforms

- To add a new entry, simply provide a Name, a valid XSL File path and a valid Watch Directory path and click the Add button.
- To edit an existing entry, first select the row from the Defined Transforms list and the fields will populate with the data from that row. Make any necessary edits and click the Save button.
- To copy an existing entry, first select the row from the Defined Transforms list, make and necessary changes and click the Add button to add a new entry based on the original.
- To delete an entry, first select the row from the Defined Transforms list and click the Delete button. You will be asked to confirm your desire to delete a transform prior to it being removed.

Usage

XML Transform will run unattended once properly configured. Multiple copies of XML Transform can be run across different workstation or servers but each instance of XML Transform will require additional licensing.

Creating XSL Files

XML Transform comes preconfigured with four XSL files. The principal function of any XSL file is to manipulate the format of the file in a way that it can be ingested into SmartSearch via the XML Import Utility. SmartSearch expects XML to be formatted in a particular way, as defined in Figure 5. It is important to note that you should only include fields that are valid fields of the specified Archive. Invalid fields will cause the import into SmartSearch to fail.

```
<Import>
  <Archive Name="Accounts Receivable">
    <Document>
      <DocFile FileLoc="C:\imports\Kofax\ARInvoices\020908001.TIF" />
      <Fields>
        <Field Name="Invoice_Number" Value="IN89002" />
        <Field Name="Date" Value="02/08/2008" />
      </Fields>
    </Document>
  </Archive>
</Import>
```

Figure 5: SmartSearch XML Import Format

SmartSearch XSL files follow standard conventions for XSL Transformations. The Internet has volumes of freely available information on writing XSLT. Google "XSLT" for information on how to write your own transforms, or contact Square 9 Softworks for more information on having our services team assisting in developing a new transform for your specific needs.

Note that there are three parameters available for use in your XSLT. These parameters are useful when you XML data does not directly reference the image file it describes. These are:

- File_Path – The path to the current XML file.
- File_Name – The name of the current XML file.
- File_Name_NE – The name of the current XML file with no extension.

They can be referenced in the following manner:

```
<xsl:param name="File_Path" />
<xsl:param name="File_Name" />
<xsl:param name="File_Name_NE" />
```