

Kofax Copitrak

LEAP Connector Installation Guide

Version: 1.1.0

Date: 2023-06-13

KOFAX

© 2010–2023 Kofax. All rights reserved.

Kofax is a trademark of Kofax, Inc., registered in the U.S. and/or other countries. All other trademarks are the property of their respective owners. No part of this publication may be reproduced, stored, or transmitted in any form without the prior written permission of Kofax.

Table of Contents

Preface	4
System requirements.....	4
Related documentation.....	4
Getting help with Kofax products.....	4
Installation.....	6
Prerequisites.....	6
Install the LEAP Connector.....	6
Uninstall the LEAP Connector.....	6
Configure LEAPConnectorService.exe.config.....	7
Logging information section.....	8
Authentication and configuration.....	9
Run the LEAPConnectorService.....	10
Output (Polled) file specifications.....	10
Billing file specifications.....	11
LEAP Connector diagnostic.....	12

Preface

This guide provides instructions for administrators who are responsible for installing the Kofax Copitrak LEAP Connector.

System requirements

System requirements are listed in the *Technical Specifications* document, which is available from the [Kofax Copitrak Product Documentation](#) site. The document is updated regularly, and we recommend that you review it carefully before installing your product.

Related documentation


Product documentation for Kofax Copitrak 3.4.0 is available here:

<https://docshield.kofax.com/Portal/Products/Copitrak/3.4.0-csb5nx1k32/Copitrak.htm>

Getting help with Kofax products

The [Kofax Knowledge Portal](#) repository contains articles that are updated on a regular basis to keep you informed about Kofax products. We encourage you to use the Knowledge Portal to obtain answers to your product questions.

To access the Kofax Knowledge Portal, go to <https://knowledge.kofax.com>.

 The Kofax Knowledge Portal is optimized for use with Google Chrome, Mozilla Firefox, or Microsoft Edge.

The Kofax Knowledge Portal provides:

- Powerful search capabilities to help you quickly locate the information you need.
Type your search terms or phrase into the **Search** box, and then click the search icon.
- Product information, configuration details and documentation, including release news.
To locate articles, go to the Knowledge Portal home page and select the applicable Solution Family for your product, or click the View All Products button.

From the Knowledge Portal home page, you can:

- Access the Kofax Community (for all customers).

On the Resources menu, click the **Community** link.

- Access the Kofax Customer Portal (for eligible customers).
Go to the [Support Portal Information](#) page and click **Log in to the Customer Portal**.
- Access the Kofax Partner Portal (for eligible partners).
Go to the [Support Portal Information](#) page and click **Log in to the Partner Portal**.
- Access Kofax support commitments, lifecycle policies, electronic fulfillment details, and self-service tools.
Go to the [Support Details](#) page and select the appropriate article.

Installation

The Kofax Copitrak LEAP Connector is a tool to upload billing files to the [LEAP Legal system](#) through the cloud client. It is also capable of downloading the client's Matter list, Task Code list and Tax Code list. The connector is accessed through a Windows service, which monitors specific folders for data to upload to the LEAP cost-recovery database, and periodically pull data from the LEAP Cloud Data Provider. This pulled data can then be imported into local services (Copitrak or Equitrac).

Minimum compatible version: Kofax Copitrak CSS Server 700 SP2.17 or Kofax Equitrac EP 5.7.

Prerequisites

The Kofax Copitrak LEAP Connector requires the following:

- Windows 10, Windows Server 2012 or higher
- Microsoft .NET Framework 4.8
To download it, visit <http://www.microsoft.com/en-%20%20ca/download/details.aspx?id=30653>.
- LEAP Cloud Client software

Install the LEAP Connector

To install the LEAP Connector, do the following:

1. Extract the content of the .zip file (KofaxCopitrakConnector_1.1.0_For_LEAP.zip).
2. Run the installer Copitrak-LEAP-ConnectorService-1.1.0.1.msi.

You can also install the LEAP Connector in silent mode by running the following command from an administrator command prompt window:

```
msiexec /i Copitrak-LEAP-ConnectorService-[version].msi /qn
```

When the LEAP Connector is installed successfully, the connector appears in **Control Panel > Programs and Features** as **Kofax Copitrak LEAP Connector Service**.

Uninstall the LEAP Connector

1. Open **Control Panel**.
2. Navigate to **Programs and Features**.

3. Find and right-click on **Kofax Copitrak LEAP Connector Service**.
4. Click **Uninstall**.

Configure LEAPConnectorService.exe.config

Application Settings section:

```
<appSettings>
  <add key="ArchiveFolder" value="DATA\Archive"/>
  <add key="ErrorFolder" value="DATA\Errors"/>
  <add key="MonitorPath" value="DATA"/>
  <add key="MatterCSVFolder" value="DATA\Matters"/>
  <add key="PollIntervalInSeconds" value="3600"/>
  <add key="TransactionFieldDelimiter" value=","/>
  <add key="TransactionDataDelimiter" value="&quot;"/>
  <add key="ClientSettingsProvider.ServiceUri" value=""/>
  <add key="UseV1RowModel" value="false"/>
  <add key="LogPostCR" value="false"/>
  <add key="FullSyncPollIntervalInHours" value="24"/>
  <add key="FullSyncStartTime" value="02:00am"/>
  <add key="FullSyncMatterDTSX" value="FullSyncMatterDTSX"/>
  <add key="UpdateMatterDTSX" value="UpdateMatterDTSX"/>
  <add key="DeleteMatterDTSX" value="DeleteMatterDTSX"/>
  <add key="ImporterTimeoutInSeconds" value="90"/>
</appSettings>
```

Setting	Description	Default Value
<setting name="MonitorPath" serializeAs="String">	Set the location of the monitored Data folder relative to %programdata%\Kofax\Copitrak\LeapConnector\.	DATA
<setting name="MatterCSVFolder" serializeAs="String">	The location where the Matters, Task Codes, and Tax Codes files will be written when they are pulled from the LEAP system. This folder will be created if it does not already exist. Each file will be date stamped such as TaxCode_yyyy-mm-dd_hh-mm-ss.csv, or Matter_yyyy-mm-dd_hh-mm-ss.csv. The client who uses this data is expected to keep this folder clean.	DATA\Matters
<add key="PollIntervalInSeconds" value="3600"/>	Time interval for partial sync in seconds. If the value is 3600, LEAP downloads and syncs the updated and deleted matter list every 3600 seconds.	
<add key="FullSyncPollIntervalInHours" value="24"/>	Time interval for full sync in hours. If the value is 24, LEAP downloads and syncs the complete list every 24 hours.	


Setting	Description	Default Value
<code><add key="FullSyncStartTime" value="02:00am"/></code>	Determines when full sync occurs.	
<code><add key="FullSyncMatterDTSX" value="FullSyncDTSX"/></code>	Specifies the name of complete list dtsx file.	
<code><add key="UpdateMatterDTSX" value="UpdateDTSX"/></code>	Specifies the name of updated list dtsx file.	
<code><add key="DeleteMatterDTSX" value="DeleteDTSX"/></code>	Specifies the name of deleted list dtsx file.	
<code><add key="ImporterTimeOutInSeconds" value="90"/></code>	Timeout limit for importer to run. If the value is 90, importer has 90 seconds to complete execution.	

Logging information section

You may adjust the logger minlevel to be one of the following: Trace, Debug, Info, Warn, Error.

Authentication and configuration

1. Execute LeapConnectorCP.exe.
2. Authenticate the service account by signing in with valid user credentials.

 You only need to do it for the first time. The OAuth v2 consent dialog might appear.

A message appears to confirm successful authentication and inform you that the service is starting.


3. Click **Start Service** to start the service for the first time. It is set to run automatically, but only when the system has been restarted.
4. Close the application.

Run the LEAPConnectorService

There are three folders under `C:\ProgramData\Kofax\Copitrak\LeapConnector\DATA` folder.

Once the service has been started, it will monitor the selected [MonitorPath] for changes, such as the addition of a new file. Once a new file is detected, the service attempts to upload the data to the LEAP system.

The LEAP Connector Service also periodically polls the LEAP system (every PollIntervalInSeconds) for system information which can then be imported into the local system. The data polled includes the Matter list, the Tax Code list, and the Task Code list. The data retrieved from LEAP is written to the MatterCSVFolder specified in the configuration.

 The service does not empty this folder, or overwrite the data stored there. Every time the LEAP system is polled, the data files get time-stamped. What this means is that the data consumer is responsible for cleaning up the folder.

Output (Polled) file specifications

The output file for each of the Matter, TaskCode, and TaxCode data tables is comma delimited, with fields enclosed in double quotes. The files all have a header as the first line, describing the fields returned from the LEAP Connector.

The Matter CSV file header looks similar to:

```
"MatterId,FileNumber,FirstDescription,SecondDescription,CustomDescription,MatterType,Matter Status,IsCurrent,MatterState,StaffInitials,StaffResponsible,StaffCredit,StaffActing,StaffAssisting,IsArchived,DeleteCode,RowVersion,CardIdList,Accessible,RecVer,InstructionDate,BillingMode"
```

The TaxCode CSV file header looks similar to:

```
"Deleted,FirmId,GLTaxCode,GLTaxCodeType,RatePercent,RowVersion,LeapTaxCode,TaxCodeDescription,TaxCodeId"
```

The TaskCode CSV file header looks similar to:

```
"NameFileAs,BillingDescription,AmountEach,Deleted,GroupOnInvoice,IncTax,PurchaseMode,PurchaseSupplierCardId,TaskCodeId,TaxCodeId"
```

Billing file specifications

The billing files format requires comma-separated values and double-quotes as field delimiters. The data must include a header row, detailing what the columns in the file represent.

The following is a list of possible field names that are currently in use with the LEAP Connector:

- CostRecoveryId *
- TransactionDate *
- MatterId *
- Quantity
- AmountEach
- BillingDescription *
- BillingMode
- IncTax
- PurchaseMode
- PurchaseSupplierCardId
- TaskCodeId
- TaxCodeId *
- TotalExTax
- TotalIncTax
- TotalTax

The fields that are marked with an asterisk (*) are required by the LEAP system.

LEAP Connector diagnostic

The logging folder is created under `C:\ProgramData\Kofax\Copitrak\LeapConnector\LogFiles` folder.

There are two log files created for diagnostic purposes:

- LeapConnectorCP.log – user authentication and authorization events.
- LEAPConnectorSvc.log – service activities and import/export operations.