Kofax Copitrak

NetDocuments Connector Installation and Configuration Guide

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KOFAX

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Preface

This guide provides instructions for administrators who are responsible for installing and using Kofax Copitrak NetDocuments Connector. Use this guide to get started with the software and become familiar with the product features.

System requirements

For information on supported operating systems and other system requirements, see the *Technical Specifications* document on the Kofax Copitrak Product Documentation page. The document is updated regularly, and we recommend that you review it carefully to ensure success with your Kofax Copitrak 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.

Chapter 1

Introduction

This document provides information on how to install and configure Kofax Copitrak NetDocuments Connector on a CSS Server. This bi-directional connector gives you the ability to explore content and metadata conveniently from the NetDocuments cloud-based DMS. You can also import files to NetDocuments from Copitrak DM-aware software or scan from compatible MFP devices. This product relies on NetDocuments REST API Version 15.3 or higher.

> This guide applies to installation and configuration of the Kofax Copitrak NetDocuments Connector version 2.2.0. This guide cannot be used to set up and configure the Kofax Copitrak NetDocuments Connector version 1 release.

Installation overview

Kofax Copitrak NetDocuments Connector installation requires the following:

- Copitrak CSS or higher installed and updated.
- Eclipse or Edge terminal set up and configured with required terminal and user groups.
- Copitrak Scan configured for the Scan To Folder feature.
- A NetDocuments DMS administrator account. See Prerequisites for NetDocuments authentication for NetDocuments DMS system information.
- Common knowledge for NetDocuments server-side configuration regarding repository, cabinet, workspace, folder, etc.

> Copitrak CSS Server can only support a single scan to a DMS Connector. Scanning to multiple Document Management Systems is not supported.

Scope

Refer to the Kofax Copitrak NetDocuments Connector release log for detailed version compatibility information.

> Only PDF types (PDF/A, searchable or image only) are currently supported with Copitrak DMS Connector. Document uploads are restricted to the folder/filters under the workspace. Uploading documents to the workspace directly or to top folders is not supported; therefore, upload options are not available for the workspace list on Eclipse/Edge.

Prerequisites for NetDocuments authentication

The Copitrak NetDocuments Connector does not rely on any specific authentication method. It works as long as the user ID given to Copitrak for NetDocuments access has the proper access permissions for all the required repositories, cabinets and workspaces.

NetDocuments credentials can be collected in advance of the installation to speed up the installation process and avoid delays caused by lack of configuration information.

The user must have access permission to the repository. The user will appear in NetDocuments as the "modified by" person. Therefore, the user name must be generic. For example, use *Copitrak Scan* instead of a real name such as *John Smith.*

Procedure for prerequisites and installation

This section includes prerequisites, followed by a summary of the installation and configuration procedures described in subsequent chapters.

Prerequisites

1. Obtain the credentials for the NetDocuments account. See Prerequisites for NetDocuments authentication.
2. Log in and download the latest connector from the following location:

   http://edeliveryadmin.kofax.com/Metadata/Files?PackageId=1099

Installation and configuration summary

1. Configure Eclipse or Edge Terminal pre-mode settings. See Eclipse or Edge Terminal pre-mode configuration.
2. Configure Copitrak Scan for **Scan To Folder**. This feature is often required in addition to **Scan To DMS** and it is useful for testing Copitrak Scan prior to installing the DMS Connector. Also, this will configure the necessary scan in folders to be used by both **Scan To Folder** and **Scan To DMS** features. For detailed instructions, see Scantrak Configuration.
3. Configure the Eclipse or Edge terminal groups, user groups and pre-modes required for **Scan To Folder** and **Scan To DMS**. For details, see Eclipse or Edge terminal groups setup.
4. Install the NetDocuments DMS Connectors as described in Install the NetDocuments Connectors.
5. Log in to NetDocuments and authenticate Copitrak sessions, as described in Log in to NetDocuments and authenticate Copitrak sessions.
6. Retrieve the list of users under the specified account, as described in Retrieve NetDocuments users.
7. Perform a user profile setup as described in User profile setup.
8. Perform the account setup as described in Account setup.

Chapter 2

Eclipse or Edge Terminal pre-mode configuration

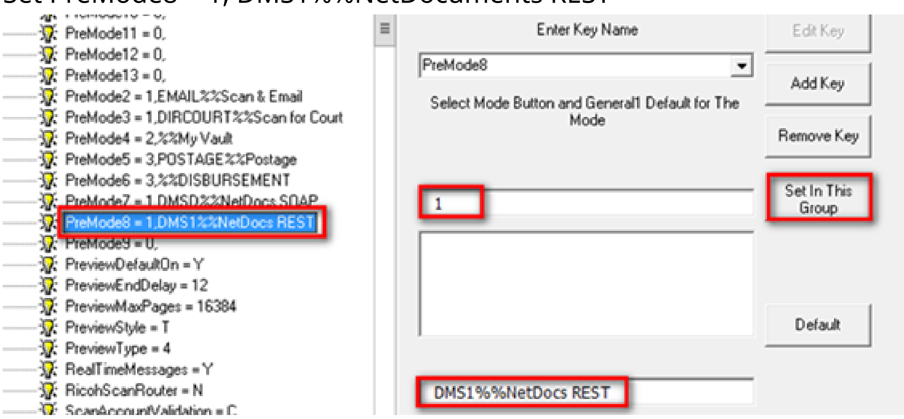
Eclipse or Edge terminal groups and pre-modes should be configured prior to configuring Scantrak and installing the NetDocuments Connectors.

Set up the NetDocuments pre-mode button

Start Config File Manager and follow the steps below to set up the pre-mode button for NetDocuments.

1. Select **Terminal/User Options**.
2. Select the **Terminal Group** to be used for scanning to NetDocuments. (In this example, it is TERMINAL_GROUP_REGULAR).
3. Set working modes. In this case, only Scan-Mode is enabled.
   a. Set ModeCopy = Copy,0
   b. Set ModeScan = Scan,1
4. Set Scan to NetDocuments pre-mode button.

   Set PreMode8 = 1, DMS1%%NetDocuments REST



5. Click **Set In This Group** to save changes, and then close the application and return to the Config File Manager.
6. The relevant User Group may need to have the corresponding scan routes set up if there is more than one user group and if the scan routes are different among the user groups.

Chapter 3

Install NetDocuments Connectors

This chapter explains how to install or remove both the NetDocuments Scan Connector and the NetDocuments Print Connector.

Install the NetDocuments Scan Connector

You can install the NetDocuments Scan Connector using either of the following methods:

- Run the installer on the system where the Copitrak Server is already installed.
  The installer shows progress as it deploys files.
- Install the scan plugin in silent mode.
  Run the following command from the administrator command prompt:
  ```
  msiexec /i NetDocsScanInstaller.2.2.0.5.msi /qn
  ```

The installer behavior is the same, whether it is executed in silent mode or normal mode. The installer finds the path to CSS installation (usually `C:\ers`) and deploys files under the subfolder DMS. If an older manually deployed version of this connector is found, the installer makes a backup copy of the older version before proceeding.

Uninstall the NetDocuments Scan Connector

When the scan connector is installed successfully, it appears in **Control Panel** > **Programs and Features** as **Kofax NetDocuments Scan Connector**.

1. Open **Control Panel**.
2. Navigate to **Programs and Features**.
3. Find and right-click on **Kofax NetDocuments Scan Connector**.
4. Click **Uninstall**.

Install the NetDocuments Print Connector

The NetDocuments Print Connector should be installed only when needed on the Copitrak Desktop workstations, and not on the CSS server.

Before installing the NetDocuments Print Connector, make sure that Copitrak Desktop is already installed according to the instructions in the *Kofax Copitrak Desktop Installation and Configuration Guide*.

You can install the NetDocuments Print Connector using either of the following methods:

- Run the installer. The installer deploys files under the existing Desktop client folders.

  > If the Desktop client is not installed, the installer fails with an error: "Copitrak Desktop Installation Folder not found."

- Install the Print Connector in silent mode.
  Run the following command from an administrator command prompt:
  ```
  msiexec /i NetDocumentsPrintInstaller.x.x.x.x.msi INSTALLFOLDER="C:\Program Files (x86)\Kofax\Copitrak" /qn
  ```

When the Print Connector is installed successfully, it appears in **Control Panel** > **Programs and Features** as **Kofax NetDocuments Print Connector**.

Uninstall the NetDocuments Print Connector

Make sure that Copitrak Desktop is still installed. If Copitrak Desktop is uninstalled before the uninstallation of NetDocuments Print Connector, the Print Connector cannot be removed.

1. Open **Control Panel**.
2. Navigate to **Programs and Features**.
3. Find and right-click on **Kofax NetDocuments Print Connector**.
4. Click **Uninstall**.

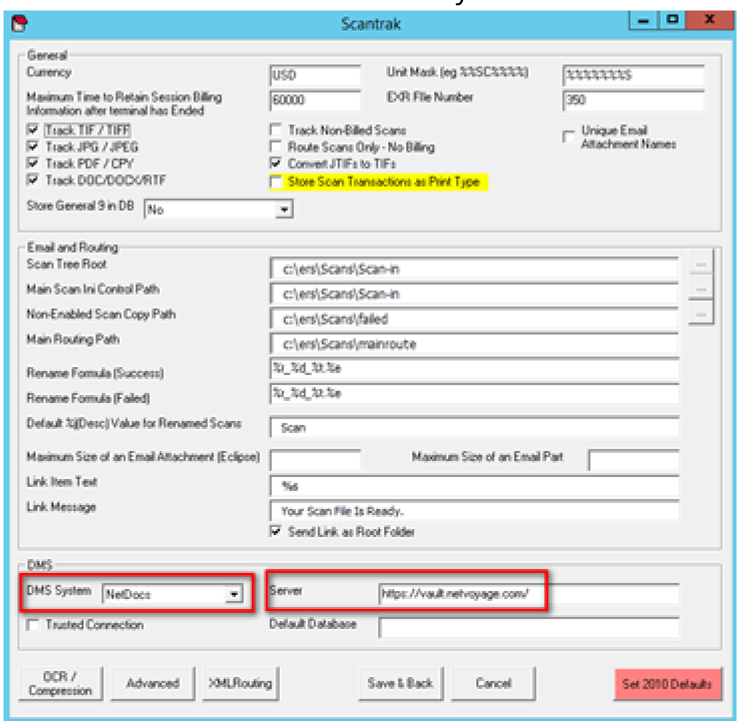
> The Print Connector must be uninstalled while Copitrak Desktop is still installed. If Copitrak Desktop is uninstalled first, the Print Connector cannot be removed.

Chapter 4

Scantrak configuration

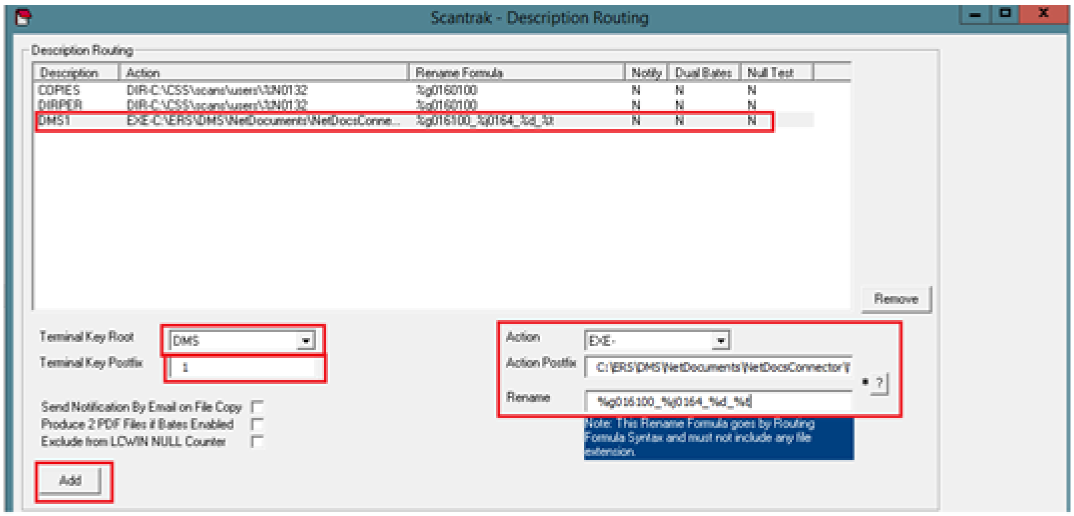
Use the procedure in this chapter to configure Scantrak.

1. Click **Scantrak** in the **Configuration Manager** to start Scantrak.
   Configuration Manager can be started form the Copitrak shortcut folder.
2. Review the Scantrak window to verify installation.



The server URL varies from one continent to another. Make sure that you change the server URL here to the correct NetDocuments server.
For more information on the specific URLs, see Configuration to support US/EU/AU URLs.

3. Click **XML routing** to start the **Scantrak - Description Routing** dialog box, and create an action for the NetDocuments scan route.



a. In the **Terminal Key Root** drop-down list, select **DMS**.

b. In the **Action** drop-down list, select **EXE**.
This directs ScanTrak to start a program specified in the **Action Postfix** field.

c. In the **Action Postfix** field, specify the full path with the program file name, matching with the NetDocuments file location.

`C:\ERS\DMS\NetDocuments\NetDocumentsConnector\NetDocumentsTools.exe`

d. In the **Rename** field, enter the routing formula as %g0160100_%I0164_%d_%t.

e. Click **Add** to convert the field values above to a new item (DMS1) in the **Description Routing** list.

f. Enter the following path in the **Backup Folder For Routed Scans** field:
`C:\ERS\scans\backup`.

g. Click **Save & Back** to save changes and return to the **Scantrak** window.

4. Click **XML routing** to start the **Scantrak - Description Routing** dialog box.
5. Select the item starting with **DMS** in the **Description Routing** list.
6. Click **Terminal Setup** to proceed to configuring terminal, user, and language groups for **Scan To NetDocuments**.
The **Scantrak Routing Terminal Configuration** window appears.

Chapter 5

Eclipse or Edge terminal group setup

1. Start **Scantrak Routing Terminal Configuration** to set up the Eclipse or Edge terminal group, user groups, and language groups.

   To start Scantrak Routing Terminal Configuration, click **ScanTrak** in the **Configuration Manager** (Configuration Manager can be started form the Copitrak shortcut folder), and then click **XML Routing**, followed by **Terminal Setup**.

   All configuration data is stored in terminal_setup.ini and based on the following Profile Attributes that are configured for the repository and the cabinet on the NetDocuments server side. If the client has different profile attributes, the terminal configuration is also different.

Profile Attribute ID	Profile Attribute Name
1001	Client
1002	Matter
1003	Author
1004	Doc Type
1005	Notes
1006	Law Area
1007	Department

2. In the **Active Route** drop-down list, click the item just created in Scantrak configuration.
3. Highlight all available and related terminal groups, user groups, and language groups in the following lists:
   a. Available Terminal Groups
   b. Available User Groups
   c. Available Language Groups

   In a standard installation, the terminal group REGULAR, user group REGULAR, and language group ENGLISH must be selected. Hold down the **Ctrl** key while clicking to select multiple items in the same list.

4. Click each button to move all selected items from the **Available groups** list to the corresponding **Selected groups** list.

   As soon as all three lists on the right (**Selected Terminal Groups**, **Selected User Groups**, and **Selected Language Groups**) are populated, the **General Option** and **Additional Options** tabs appear on the right.
5. Click **Set Route Defaults** to populate the fields with default values.

6. Set the fields on the **General2-4** tab. Use the following values for a typical use case[1].

   > General2 and General3 are reserved for email routing.

   a. General2 section:
      - Pick List Source
      - Pick List Title: **File Type**
      - Validation: **Default**
      - Mask
      - Default: **OCR**
      - Prompt
      - Reject
      - No result

   b. General3 section:
      - Pick List Source: **!1**
      - Pick List Title: **Cabinet**
      - Validation: **PickList**
      - Mask
      - Default
      - Prompt: **Cabinet**
      - Reject
      - No results: **Failed to return cabinets**

   c. General4 section:
      - Pick List Source: **!2-0**
      - Pick List Title: **Workspace**
      - Validation: **Picklist**
      - Mask
      - Default
      - Prompt: **Workspace**
      - Reject
      - No results: **There is no workspace for this Matter**

7. Set the fields on the **General5-7** tab. Use the following values for a typical use case:

   a. General5 section:
      - Pick List Source: **!3-0**
      - Pick List Title: **Folder**
      - Validation: **PickList**
      - Mask
      - Default
      - Prompt: **Folder**

[1] The actual configuration depends on the unique NetDocuments attributes of clients.

    - Reject
    - No results
  b. General6 section:
    - Pick List Source: **!3-3**
    - Pick List Title: **SubFolder**
    - Validation: **PickList**
    - Mask
    - Default
    - Prompt: **SubFolder**
    - Reject
    - No results
  c. General7 section:
    - Pick List Source: **!4-3**
    - Pick List Title: **Author**
    - Validation: **PickList**
    - Mask
    - Default
    - Prompt: **Author**
    - Reject
    - No results

8. Se the fields on the **General8-10** tab. Use the following values for a typical use case:
  a. General8 section:
    - Pick List Source: **!4.6**
    - Pick List Title: **Law Area**
    - Validation: **PickList**
    - Mask
    - Default
    - Prompt: **Law Area**
    - Reject
    - No results
  b. General9 section:
    - Pick List Source: **!4.4**
    - Pick List Title: **Doc Type**
    - Validation: **PickList**
    - Mask
    - Default
    - Prompt: **Doc Type**
    - Reject
    - No results

c. General10 section:
   - Pick List Source: **X**
   - Pick List Title
   - Validation: **Default**
   - Mask
   - Default
   - Prompt
   - Reject
   - No results

9. Set the fields on the **General11-13** tab. Use the following values for a typical use case:
   a. General11 section:
      - Pick List Source: **X**
      - Pick List Title
      - Validation: **Default**
      - Mask
      - Default
      - Prompt
      - Reject
      - No results
   b. General12 section:
      - Pick List Source: **X**
      - Pick List Title
      - Validation: **Default**
      - Mask
      - Default
      - Prompt
      - Reject
      - No results
   c. General13 section:
      - Pick List Source: **X**
      - Pick List Title
      - Validation: **Default**
      - Mask
      - Default
      - Prompt
      - Reject
      - No results

10. Set the fields on the **General14-16** tab. Use the following values for a typical use case:
    a. General14 section:
        - Pick List Source: **X**
        - Pick List Title
        - Validation: **Default**
        - Mask
        - Default
        - Prompt
        - Reject
        - No results
    b. General15 section:
        - Pick List Source
        - Pick List Title
        - Validation: **Default**
        - Mask
        - Default
        - Prompt
        - Reject
        - No results
    c. General16 section:
        - Pick List Source
        - Pick List Title: **File Name**
        - Validation: **Open**
        - Mask
        - Default
        - Prompt: **Please type the name of your scan**
        - Reject
        - No results
11. Set the fields on the **Additional Options** tab as follows:
    a. In the **Route Specific Options** section, set the following fields:
        - Account Validation: Validated (Open Com Fail)
        - Account Default
        - Next File Text
    b. In the **Route Specific Options** section, set the check boxes as follows:
        - Clear all the check boxes.
        - Select the following check boxes only:
            - Show bates General2
            - Show bates General16
    c. Click **Save & Back** to save changes and return to the **Scantrak - Description Routing** dialog box.

d. Click **Save & Back**, and then close the Scantrak window.

Chapter 6

User profile setup

Use the procedure in this chapter to set up a user profile for NetDocuments.

1. Log in to **CSS Manager**, and then navigate to **List** > **Validation List** > **User** > **Master**.
2. Create a user by providing the details. **Group Name** should match the user group used in Eclipse or Edge terminal groups setup.
3. The **User ID** is used to log into the Eclipse terminal. Add the necessary NetDocuments-specific fields to the **Profiles** drop-down list as follows:
   a. In the **Profiles** list, select **E-mail**.[2]
   b. Type the e-mail address into the box, and click **Update** to assign it to the profile.
   c. In the **Profiles** list, select or add **NetworkId**.
   d. Type the network ID into the box below, and click **Update** to assign it to the profile.

   e. In the **Profiles** list, select or add **NetworkId2**.
   f. Type the NetDocuments network ID into the box below, and then click **Update** to assign it to the profile.

   g. In the **Profiles** list, select or add **NetDocs**.

   Do not add or select **NetDocuments** as a profile. It is invalid and will cause failure.

   h. Type the NetDocuments value identifier into the next box, and click **Update** to assign it to the profile.

[2] If there is no such profile, click **New** (right into the **Profiles** text box), and then add it to the list.

The NetDocuments value identifier for the user can be retrieved from Retrieve NetDocument users. The user must have the **View/Edit** access to the repository, cabinet, etc.

i. Click **Save & Close** to keep all updates and return to the CSS Manager.

Verify user profile setup

Review the user profile setup. Use the filter fields above the lists to find the list item for review.

1. In **CSS Manager**, under **Lists** > **Validation List** > **User** > **Master**, locate the user profile just created. (For details, see User profile setup.)
2. Make sure that the user profile is displayed correctly in the user list and it is shown as the member of the correct group.
3. Under **List** > **Validation List** > **User** > **Groups**, locate the user group (**Regular**).
4. Make sure that the **Security** field of the group is set to **1**.

Chapter 7

Account setup

Use the procedure in this chapter to set up an account and billing for NetDocuments.

1. Log in to **CSS Manager**, and then navigate to **List** > **Validation List** > **Account** > **Groups**.
2. Provide an account group (**Billable** in our example) for NetDocuments accounts:
    a. If there is no account group for NetDocuments specified, click **New** on the toolbar to open a **New Account** dialog box.
    b. If there is an existing account group for NetDocuments, double-click that line to open the **Edit Account** dialog box.
    c. Edit the form according to the example below:
        1. Set **Group Name** to **Billable**.
        2. Set **Security Character** to **1**.
        3. Select the **Billable** check box.
    d. Click **Save & Close**.
3. Navigate to **List** > **Validation List** > **Account** > **Master**.
4. Provide a validation record for the account (0001.01 in the example). This is the client matter that will be selectable in the Eclipse simulator for **Scan To NetDocuments**. Do the following:
    a. If there is no validation record for the account, click **New** on the toolbar to open a **New Account** dialog box.
    b. If there is an existing validation record for the account, double-click that line to open the **Edit Account** dialog box.
    c. Edit the form according to the example below:
        1. Set **Account To Validate** to **0001.01**.
        2. Set **Account To Bill** to **0001.01**.
        3. Set **Client** to **1**.
        4. Set **Matter** to **1**.
        5. Select the **Billable** in the **Group name**.
        6. Click **Save & Close**.

Verify account setup

Review account data. Use the filter fields above the lists to find the list item for review.

1. Under **Lists** > **Validation List** > **Account** > **Master**, locate all the valid client-matter numbers.

   Make sure that the client-matter number is valid in the NetDocuments repository on the NetDocuments portal (https://vault.netvoyage.com/neWeb2/docCent.aspx).
2. Under **Lists** > **Validation List** > **Account** > **Groups**, locate the account group.
3. Make sure that the **Security** field of the group is set to **1**.
4. Make sure that the **Billable** field of the group is set to **Yes**.

Chapter 8

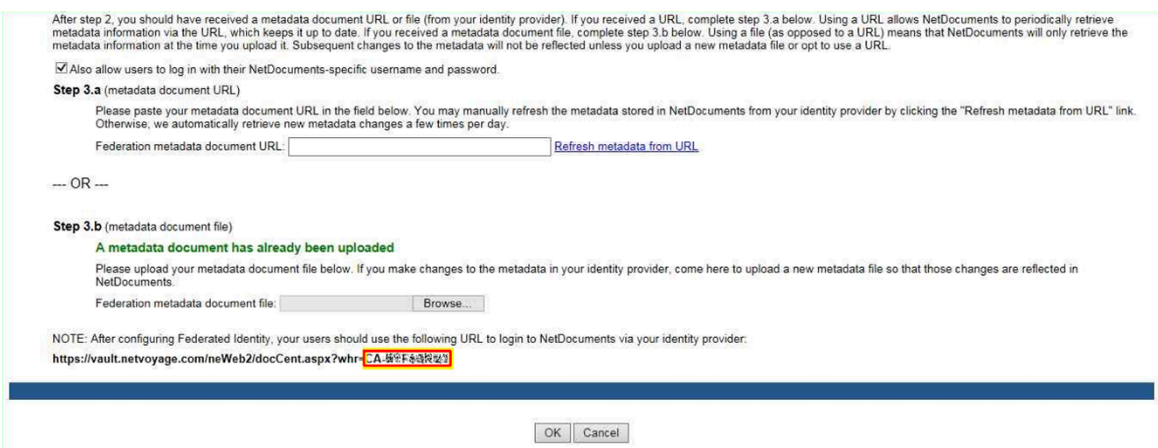
Set up Repository ID

The NetDocuments Repository ID must be located and added to the NetDocumentsAPI.dll.config file manually. To do it, do the following:

1. Obtain the Repository ID from the NetDocuments portal.
2. Edit the NetDocumentsAPI.dll.config file and configure the Repository ID.

Find Repository ID in NetDocuments

1. Visit www.netdocuments.com.
2. Sign into the portal as Administrator.
   Only NetDocuments users with administrator privileges may access the following pages.
3. Click **Admin** on the menu bar at the top right corner, and then select the desired repository name.
4. In the **Repository** segment, click the **Add and remove users and groups** link.
5. Click the **Configure advanced authentication options** link.
6. Scroll down the page. Under the closing note, locate the link provided for user login. The repository ID is included in this URL, following the `whr=` parameter.



7. Note the repository ID for later use. The format of the ID is CC-AAAAAAAN, where:
   - **CC**: Country code on two capital letters.
   - **A**: Single capital letter.
   - **N**: Single decimal digit.

Configure Repository ID

The NetDocuments repository ID can be obtained from the NetDocuments portal. This ID must be added to the `NetDocumentsAPI.dll.config` file. Follow the steps below to proceed with this modification.

1. Use Windows File Explorer to navigate to:

   `C:\ERS\DMS\NetDocuments\NetDocumentsConnector\`.
2. Select the NetDocumentsAPI.dll.config file and open it with a plain text editor.
3. Look for the `<add key="Repository>` entry.

   It must be in the following subsection: `<configuration>/<appSettings>`.
4. Update the value string in this entry with the one obtained from the NetDocuments portal.
5. Save changes and close the editor.

Chapter 9

Log in to NetDocuments and authenticate Copitrak sessions

The NetDocuments cloud provider uses Active Directory Federation Services (ADFS) to authenticate corporate users. The ADFS must be configured with NetDocuments prior to being used by NetDocuments Connector, which implements the Authorization Code Grant Flow pattern.

ADFS requires a one-time (periodical) login to the CSS server, using the CtkNetDocumentsCP application, which receives user credentials, and then obtains and stores an OAuthAccess token. The account must have NetDocuments Repository Admin rights.

When a refresh token is issued, it will only work on the repositories to which the user has access rights at the time it is issued. If the user gains access rights to additional repositories later, a new refresh token will be needed to access those repositories. This is because there may be special authentication requirements for each repository, and those requirements are verified when a refresh token is issued, and cannot be done after the fact (such as when the token has an expiration date when the user rights change). This would cause connector import failure, which is the first issue to check upon import failure.

Log in and authenticate NetDocuments

1. Start CtkNetDocsCP.exe on the CSS server. This application resides on the following path:
   `C:\ers\DMS\NetDocuments\NetDocumentsConnector`.
2. On the **Authentication** tab, in the **CtkNetDocuments Control Panel**, make sure the **Authorization Code Grant Flow** option is selected.
3. Provide the NetDocuments username and password.
4. Click **LOGIN**, and select not to save the credentials.
   After a successful login, the Access Code is copied into the **Access Code** text box.
5. Click **Refresh Token** to populate the **Refresh Token** and **Access Token** boxes.
6. If the **Access Token** field is not populated, click the **Access Token** button. Then click **Save Tokens** to store authentication records on the CSS server in a safe location.
7. Click **NetDocumentsServer Info** to get a response by the Rest API, which is displayed in the **Rest Response** box.
8. If the last row of the status message box is not "OK", then the process fails. In this case, log out and start over from providing your NetDocuments username and password.

Retrieve NetDocuments users

After successful login to **CtkNetDocumentsCP**, retrieve the list of the users under the specified account by doing the following.

1. Click **NetDocumentsServer Info** to get a response by the Rest API, which is displayed in the **Rest Response** box. If the call succeeds, all preceding tabs are enabled.
2. Click **Retrieve Users** on the **Membership** tab.
3. Once the list is populated with user data, click **Export CSV** to save all data to a CSV file.
4. Name the file as users.csv, and then save it to `C:\ers\DMS\NetDocuments` for later use.

Chapter 10

Configuration to support US/EU/AU URLs

NetDocuments maintains separate yet identical services that are located at three separate data centers: one for the United States, one for the European Union, and another for Australia. Each service is accessed by different URLs. The NetDocuments Service login pages are respectively available here:

- US: https://vault.netvoyage.com
- EU: https://eu.netdocuments.com
- AU: https://au.netdocuments.com

Follow this procedure to configure the DMS connector for the specific URL.

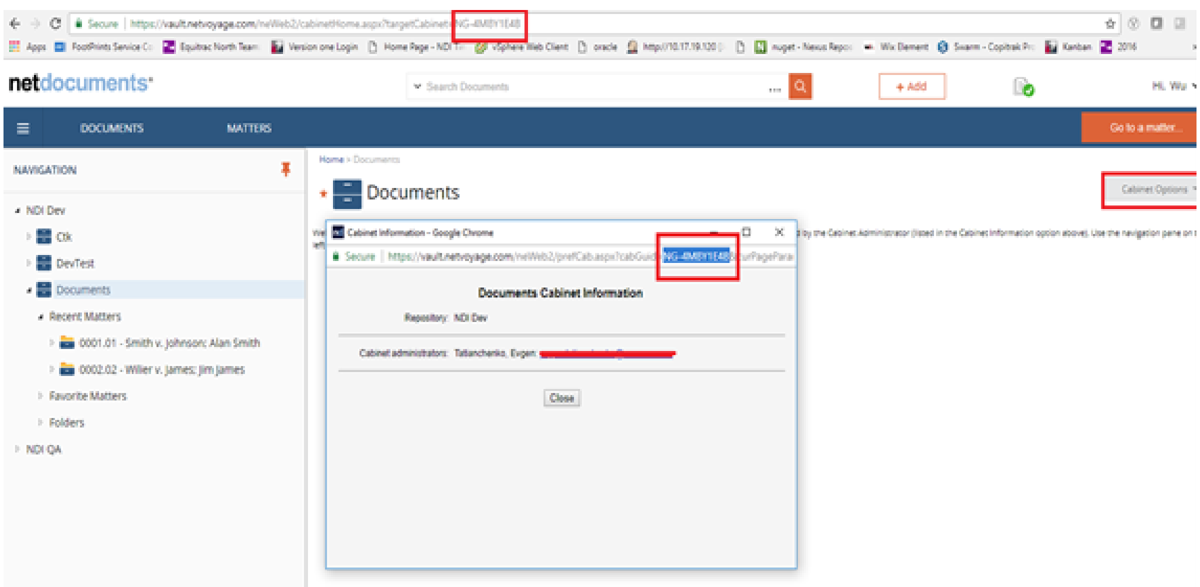
1. Obtain the login credentials for the specific URL.
2. Configure or update the NetDocuments ID as described in User profile setup.
3. Obtain the refresh token and save the token as described in Log in to NetDocuments and authenticate Copitrak sessions.
4. Set up the Repository ID as described in Set up Repository ID.
5. Update the location key from NetDocumentsAPI.dll.config. The possible location value is "US", "EU" or "AU".
6. Configure/update the CabinetSettings from NetDocumentsTools.exe.config for the cabinet from the new URL.

Chapter 11

Find Cabinet ID in NetDocuments

Cabinet ID is used to configure NetDocumentsTools.exe.config and NetDocumentsHelper.dll.config. To get the Cabinet ID, do the following.

1. Visit www.netdocuments.com.
2. Sign in to the portal as Administrator.
3. Select the Cabinet from the left **Navigation** pane, and then select Cabinet Information from **Cabinet Options** as shown below. Then you can get the Cabinet ID from the address bar or the Cabinet Information page. In the sample below, the Cabinet ID is NG-4M8Y1E4B.



Chapter 12

Application setting attributes

The following sections provide instructions on how to configure NetDocumentsAPI.dll.config, DMSCommon.dll.config, NetDocumentsHelper.dll.config, NetDocumentsTools.exe.config and NetDocumentsCP.exe.config files.

NetDocumentsAPI.dll.config configuration

1. Configure the Repository ID according to the steps in Set up Repository ID.
2. Configure the location. The available location value is listed as below:
   - US: https://vault.netvoyage.com
   - EU: https://eu.netdocuments.com
   - AU: https://au.netdocuments.com

   If the location key is not configured, US is used as the default.
3. There are three more keys in the config file: RedirectUri, LoginUrl and NetDocumentsApiUrl. Normally, you do not configure these three keys. If these keys are configured, the default value associated with the location is overwritten.

   More information regarding how to configure these three keys is available at https://support.netdocuments.com/hc/en-us/articles/205219850-API-Documentation.
4. The Access Token and Refresh Token are populated by CtkNetDocumentsCP.exe. You do not need to configure them manually.
5. Configure the log file path and the log level.
   The sample configuration is shown below.

```
<?xml version="1.0" encoding="utf-8" ?>
<configuration>
<configSections>
<section name="nlog" type="NLog.Config.ConfigSectionHandler, NLog"/>
</configSections>
<appSettings>
<add key="Repository" value="CA-RepID" />
<add key="Location" value="US" />
<add key="AccessToken" value=" " />
<add key="RefreshToken" value=" " />
</appSettings>
<nlog xmlns="http://www.nlog-project.org/schemas/NLog.xsd" xmlns:xsi="http://
www.w3.org/2001/XMLSchema-instance">
<!-- the targets to write to -->
<targets>
<target xsi:type="File"
name="logfile"
encoding="unicodeFFFE"
writeBom="true"
```

```
archiveAboveSize="5242880"
archiveFileName="c:\ERS\LogFiles\NetDocs\CtkNetDocumentsAPI.{###}"
archiveNumbering="Rolling"
maxArchiveFiles="10"
fileName="c:\ERS\LogFiles\NetDocs\CtkNetDocumentsAPI.log"
openFileCacheTimeout="30"
optimizeBufferReuse="true"
autoFlush="true"
layout="${longdate} [${threadid}] ${level:padding=-5} ${logger} [${ndc}] -
 ${message}"/>
</targets>
<!-- rules to map from logger name to target -->
<rules>
<!--All logs, including from Microsoft-->
<logger name="*" minlevel="Info" writeTo="logfile"/>
</rules>
</nlog>
</configuration>
```

DMSCommon.dll.config configuration

1. Configure the ClientMatterSplitter.
2. Configure the Client mapping.
3. Configure the Matter mapping.

The sample configuration is shown below.

```
<?xml version="1.0" encoding="utf-8" ?>
<configuration>
  <appSettings>
    <add key="ClientMatterSplitter" value="." />
    <add key="Client" value="Client" />
    <add key="Matter" value="Matter" />
  </appSettings>
</configuration>
```

NetDocumentsHelper.dll.config configuration

1. Configure the property values for the cabinets. The configuration must be consistent with the NetDocuments server-side configuration.

   > The cabinet settings are specific for each cabinet and must be configured individually. In other words, if the client has more than one cabinet in the NetDocuments server, each cabinet must have its own <cabinet> section within <CabinetSettings>.

   For example, if the client has three cabinets on the NetDocuments server, the config file needs to have the <CabinetSettings> section as follows:

```
<CabinetSettings>
<cabinet name="MyCabinet1" id="MyId1 ">
<properties>
<property key="%Client%" value="1"/>
<property key="%Matter%" value="2"/>
</properties>
</cabinet>
```

```
<cabinet name="MyCabinet2" id="MyId2 ">
<properties>
<property key="%Client%" value="1"/>
<property key="%Matter%" value="2"/>
</properties>
</cabinet>
<cabinet name="MyCabinet3" id="MyId3 ">
<properties>
<property key="%Client%" value="1"/>
<property key="%Matter%" value="2"/>
</properties>
</cabinet>
</CabinetSettings>
```

In such scenarios, you can set unique properties for each cabinet. By default, the property value for Client is 1, and the property value for Matter is 2. You can modify the property values if the desired values are different from the default values. In the example below, the property value is changed to 3 for Client and 4 for Matter.

```
<CabinetSettings>
<cabinet name="MyCabinet1" id="MyId1 ">
<properties>
<property key="%Client%" value="3"/>
<property key="%Matter%" value="4"/>
</properties>
</cabinet>
</CabinetSettings>
```

To use AccountToBill to specify Client-Matter values, add the "ClientCode" key with value="true" to the <appSettings> section of the configuration file.

```
<appSettings>
<add key="ClientCode" value="true" />
</appSettings>
```

2. Configure the log file path and the log level.

See an example of the configuration file below.

```
<?xml version="1.0" encoding="utf-8"?>
<configuration>
<configSections>
<section name="nlog" type="NLog.Config.ConfigSectionHandler, NLog"/>
<section name="CabinetSettings" type="Copitrak.DMS.NetDocuments.Config.CabinetSettings,
 NetDocumentsCabinetSettings" />
</configSections>
<CabinetSettings>
<cabinet name="Documents" id="CabinetID ">
<properties>
<property key="%Client%" value="1"/>
<property key="%Matter%" value="2"/>
</properties>
</cabinet>
</CabinetSettings>
<nlog xmlns="http://www.nlog-project.org/schemas/NLog.xsd" xmlns:xsi="http://
www.w3.org/2001/XMLSchema-instance">
<!-- the targets to write to -->
<targets>
<target xsi:type="File"
name="logfile"
encoding="unicodeFFFE"
writeBom="true"
archiveAboveSize="5242880"
archiveFileName="c:\ERS\LogFiles\NetDocs\NetDocsHelper.{###}"
archiveNumbering="Rolling"
```

```
maxArchiveFiles="10"
fileName="c:\ERS\LogFiles\NetDocs\NetDocsHelper.log"
openFileCacheTimeout="30"
optimizeBufferReuse="true"
autoFlush="true"
layout="${longdate} [${threadid}] ${level:padding=-5} ${logger} [${ndc}] - ${message}"/
>
</targets>
<!-- rules to map from logger name to target -->
<rules>
<!--All logs, including from Microsoft-->
<logger name="*" minlevel="Info" writeTo="logfile"/>
</rules>
</nlog>
</configuration>
```

NetDocumentsTools.exe.config configuration

1. Configure the cabinet key, which must be consistent with the terminal profile configuration.
2. Configure the **WorkSpace** key, which must be consistent with the terminal profile configuration.
3. Configure the **WorkFolder** key, which must be consistent with the terminal profile configuration.
4. Configure the **DocName** key, which must be consistent with the terminal profile configuration.
5. Configure the **ClientMatterSplitter** key.
6. Configure the **Client** key, which by default is "Client."
7. Configure the **Matter** key, which by default is "Matter."
8. Configure the **SmtpHost** for sending email notification.
9. Configure **Subject** of the email.
10. Configure the **From** key.
11. Configure the email **BodySuccess**.
12. Configure the email **BodyFailed**.
13. Configure the Cabinet, which must be consistent with the terminal profile configuration. Cabinet ID can be found by referencing to Find Cabinet ID in NetDocuments.

NetDocumentsTools.exe.config also needs to have the same cabinet settings section as NetDocumentsHelper.dll.config with some additional parameters.

For example, if the client has three cabinets on the NetDocuments server, then the config file needs to have the <CabinetSettings></CabinetSettings> section as follows:

```
<CabinetSettings>
<cabinet name="MyCabinet1" id="MyId1 ">
<properties>
<property key="%Client%" value="1"/>
<property key="%Matter%" value="2"/>
<property key="3" value="GENERAL7" />
<property key="6" value="GENERAL8" />
<property key="4" value="GENERAL9" /></properties>
</cabinet>
<cabinet name="MyCabinet2" id="MyId2 ">
<properties>
<property key="%Client%" value="1"/>
<property key="%Matter%" value="2"/>
<property key="3" value="GENERAL7" />
<property key="6" value="GENERAL8" />
<property key="4" value="GENERAL9" /></properties>
</cabinet>
<cabinet name="MyCabinet3" id="MyId3 ">
<properties>
<property key="%Client%" value="1"/>
<property key="%Matter%" value="2"/>
<property key="3" value="GENERAL7" />
<property key="6" value="GENERAL8" />
<property key="4" value="GENERAL9" /></properties>
</cabinet>
</CabinetSettings>
```

14. Configure the log file path and the level.

The sample configuration is shown below.

```
<?xml version="1.0" encoding="utf-8"?>
<configuration>
<configSections>
<section name="nlog" type="NLog.Config.ConfigSectionHandler, NLog"/>
<section name="CabinetSettings" type="Copitrak.DMS.NetDocuments.Config.CabinetSettings,
 NetDocumentsCabinetSettings" />
</configSections>
<appSettings>
<add key="Cabinet" value="GENERAL3" />
<add key="WorkSpace" value="GENERAL4" />
<add key="WorkFolder" value="GENERAL6" />
<add key="DocName" value="GENERAL16" />
<add key="ClientMatterSplitter" value="." />
<add key="Client" value="Client" />
<add key="Matter" value="Matter" />
<add key="SmtpHost" value="smtp.nuance.com"/>
<add key="Subject" value="Your document has been processed"/>
<add key="From" value="CopitrakServer@nuance.com"/>
<!-- <add key="SmtpPort" value="25"/> -->
<add key="BodySuccess" value="Copitrak Team has worked hard and processed your
 document. See details below."/>
<add key="BodyFailed" value="email failed"/>
</appSettings>
<CabinetSettings>
```

```
<cabinet name="Document" id="NG-CabinetID ">
<properties>
<property key="1" value="%Client%" />
<property key="2" value="%Matter%" />
<property key="3" value="GENERAL7" />
<property key="6" value="GENERAL8" />
<property key="4" value="GENERAL9" />
</properties>
</cabinet>
</CabinetSettings>
<nlog xmlns="http://www.nlog-project.org/schemas/NLog.xsd" xmlns:xsi="http://
www.w3.org/2001/XMLSchema-instance">
<!-- the targets to write to -->
<targets>
<target xsi:type="File"
name="logfile"
encoding="unicodeFFFE"
writeBom="true"
archiveAboveSize="5242880"
archiveFileName="c:\ERS\LogFiles\NetDocs\NetDocsTools.{###}"
archiveNumbering="Rolling"
maxArchiveFiles="10"
fileName="c:\ERS\LogFiles\NetDocs\NetDocsTools.log"
openFileCacheTimeout="30"
optimizeBufferReuse="true"
autoFlush="true"
layout="${longdate} [${threadid}] ${level:padding=-5} ${logger} [${ndc}] - ${message}"/
>
</targets>
<!-- rules to map from logger name to target -->
<rules>
<!--All logs, including from Microsoft-->
<logger name="*" minlevel="Info" writeTo="logfile"/>
</rules>
</nlog>
<startup><supportedRuntime version="v4.0" sku=".NETFramework,Version=v4.8" /></startup>
</configuration>
```

CtkNetDocumentsCP.exe.config configuration

Configure the log file path and the log level as the following sample configuration.

```
<?xml version="1.0" encoding="utf-8"?>
<configuration>
<configSections>
<section name="nlog" type="NLog.Config.ConfigSectionHandler, NLog"/>
<sectionGroup name="applicationSettings"
 type="System.Configuration.ApplicationSettingsGroup, System, Version=4.0.0.0,
 Culture=neutral, PublicKeyToken=b77a5c561934e089">
<section name="ca.copitrak.NetDocuments.Properties.Settings"
 type="System.Configuration.ClientSettingsSection, System, Version=4.0.0.0,
 Culture=neutral, PublicKeyToken=b77a5c561934e089" requirePermission="false" />
</sectionGroup>
</configSections>
<applicationSettings>
<ca.copitrak.NetDocuments.Properties.Settings>
<setting name="ApplicationName" serializeAs="String">
<value>CtkNetDocuments Control Panel</value>
</setting>
<setting name="PauseOnError" serializeAs="String">
<value>5</value>
```

```
</setting>
</ca.copitrak.NetDocuments.Properties.Settings>
</applicationSettings>
<nlog xmlns="http://www.nlog-project.org/schemas/NLog.xsd" xmlns:xsi="http://
www.w3.org/2001/XMLSchema-instance">
<!-- the targets to write to -->
<targets>
<target xsi:type="File"
name="logfile"
encoding="unicodeFFFE"
writeBom="true"
archiveAboveSize="5242880"
archiveFileName="c:\ERS\LogFiles\NetDocs\CtkNetDocumentsCP{###}"
archiveNumbering="Rolling"
maxArchiveFiles="10"
fileName="c:\ERS\LogFiles\NetDocs\CtkNetDocumentsCP.log"
openFileCacheTimeout="30"
optimizeBufferReuse="true"
autoFlush="true"
layout="${longdate} [${threadid}] ${level:padding=-5} ${logger} [${ndc}] - ${message}"/
>
</targets>
<!-- rules to map from logger name to target -->
<rules>
<!--All logs, including from Microsoft-->
<logger name="*" minlevel="Info" writeTo="logfile"/>
</rules>
</nlog>
<startup><supportedRuntime version="v4.0" sku=".NETFramework,Version=v4.8" /></startup>
</configuration>
```

Chapter 13

Troubleshooting

This section provides workaround for some issues that might occur during the installation and configuration of Copitrak NetDocuments.

Fail to upload files to NetDocuments server

Check the NetDocumentsTools log file. If you see an error such as "**Invalid file path: C:\ers\scans\mainroute\d88_15dc_13c550d6\VERITRAK_20171212_16162007.xml**," the rename formula for scanxmlrouting may be wrong.

If this occurs, try a different rename formula such as "%g016100_%j0164_%d_%t", and then redo the scan with the new formula again. If it goes through to NetDocuments, the connector is working and the rename formula is wrong.

Fail to get the Repository or Cabinet

1. Verify that the NetDocuments user used to generate the token has proper access permission for the repositories and cabinets.
2. Verify that the NetDocuments user used to upload the document has proper access permission for the repositories and cabinets.
3. If the user is granted new access permission, the user needs to generate the new refresh, and then access token using CtkNetDocumentsCP.exe and try it again.
4. After the user logs in to the NetDocuments website, select **Admin** > **Repository**, and then select the **Cabinet**. Make sure the user has the proper access permission for the cabinet.