Kofax Copitrak
eDocuments Connector Installation Guide

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Preface

This guide provides instructions for administrators who are responsible for installing the Kofax Copitrak eDocuments 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

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

The Kofax Knowledge Portal provides:

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- 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.

Overview

The Kofax Copitrak eDocuments Connector is a one-way connector. Therefore, any information needed to profile a document must be loaded into User Profile tables or picklists for search and entry.

Prerequisites

The following information is required to connect to the eDocuments DM server and the eDocuments SQL server.

1. eDocuments DM server details:
   To connector to the eDocuments DM server, the following information is required:
   - IP
   - Username and password
   - URL
2. eDocuments SQL server details:
   To connect to the eDocuments SQL server, the following information is required:
   - Server name
   - Username and password

DM Explorer

The Windows Explorer DM extension application must be installed on the CSS server where Scantrak is running.

While installing the extension, enter the server IP when you are prompted to specify the server that the extension should connect to.

After the extension is installed, open the extension from the Start menu. For the first time, you are prompted to enter the details for library, username and password.

The version of eDocuments that the firm is running dictates the operating system of the CSS server. Some versions are not supported on the 2008 server and the 64-bit operating system.

Do not leave the DM Explorer client running on the CSS server, as it might cause a failure with the profiling.

Installing eDocuments Connectors

This section provides instructions to install and remove both the eDocuments Scan Connector and the eDocuments Print Connector.

Installing the eDocuments Scan Connector

You can install the eDocuments Scan Connector in either of the following methods:

- Run the installer on the system where the Copitrak server is already installed.
  The installer shows the progress as it deploys the files.
- Install the Scan Connector in silent mode.
  Run the following command from an administrator command prompt:
  `msiexec /i Copitrak-eDOCS-Connector-[version].msi /qn`

The installer finds the path to the CSS installation, and deploys files under the DMS subfolder. The path is usually `c:\ers`. If an older manually deployed version of this connector is found, the installer creates a backup copy of it before proceeding.

When the scan connector is installed, it appears on the list of installed programs in **Control Panel** > **Programs and Features** as **Kofax eDocs Scan Connector**.

Uninstalling the eDocuments Scan Connector

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

Installing the eDocuments Print Connector

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

Before installing the eDocuments 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 eDocuments Print Connector in 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 Copitrak-eDocs-PrintConnector-[version].msi /qn
  ```

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

Uninstalling the eDocuments Print Connector

Make sure that Copitrak Desktop is still installed. If Copitrak Desktop is uninstalled before the uninstallation of eDocuments 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 eDocs Print Connector**.
4. Click **Uninstall**.

Configuring Copitrak for the eDocuments Scan Connector

This section provides detailed instructions on setting up the necessary for Copitrak to work with eDocuments Scan Connector.

Setting up CSS User Profile tables

1. Query the DM server for information such as document type and author.
2. Insert the values into the User Profile table for searching.

Sample queries are shown below.

Example for type_id query

1. Set nocount to "on".
2. From docsadm.documenttypes, select the DM5_Doctype, type_id and description.
3. Order by type_id.

Returns:

Results Messages

	(No column name)	type_id	description
1	DM5_Doctype	ADMIN	ADMINISTRATION - GENERAL
2	DM5_Doctype	AGREEMENT	AGREEMENTS/CONTRACTS
3	DM5_Doctype	AUDIT	AUDIT RESPONSES
4	DM5_Doctype	CLOSE DOC	CLOSING PAPERS
5	DM5_Doctype	CORP/LLC	CORPORATION/LIMITED LIABILITY CORP WORK
6	DM5_Doctype	CSHEET	ABELA TEAM CONTROL SHEETS
7	DM5_Doctype	DEFAULT	Default Document Type
8	DM5_Doctype	EMAIL- DM5	Emails profiled in DM5
9	DM5_Doctype	ESTPLAN	ESTATE PLANNING/WILLS/PATIENT ADVOCATE
10	DM5_Doctype	EXCEL	EXCEL SPREADSHEETS
11	DM5_Doctype	FAX	EMAILED FAX
12	DM5_Doctype	FOLDER	Folder Document Type

These results can be inserted directly into a User Profile using an SQL insert statement, or written to a text file for the BCP or CSS Importer.

The following is a sample command that writes the fields to a pipe-delimited file suitable for the BCP or CSS Importer:

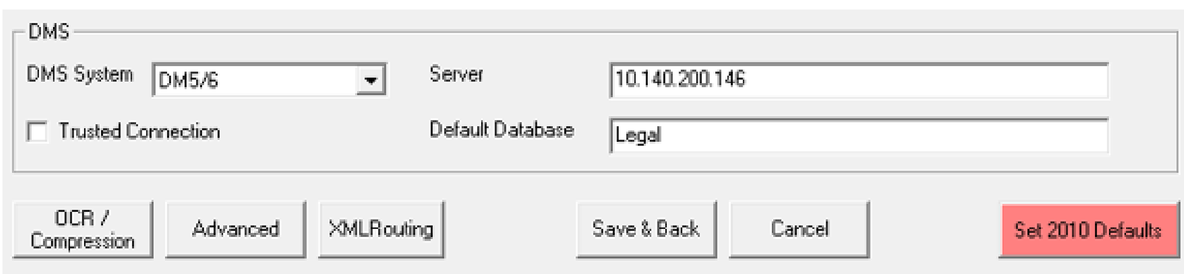
```
sqlcmd -S DETDB01 -d DET02 -E -i c:\ers\server\alarm\dm5_doctype.sql -o c:\ers
\server\alarm\dm_doctype.txt -W -w254 -h-1 -s "|".
```

Example for DM5 Author query

1. Set nocount to "on".
2. From docsadm.people, select DM5_AUTHOR, user_id and full name.
3. Order by full_name.

Setting up the Eclipse terminal

1. Open **Config File Manager**.
2. Click **Scantrak**.
3. In the DMS field set, change the following settings:
   - DMS System: DM5/6
   - Server: IP of the eDocuments server
   - Default Database: Database of the eDocuments server to connect to

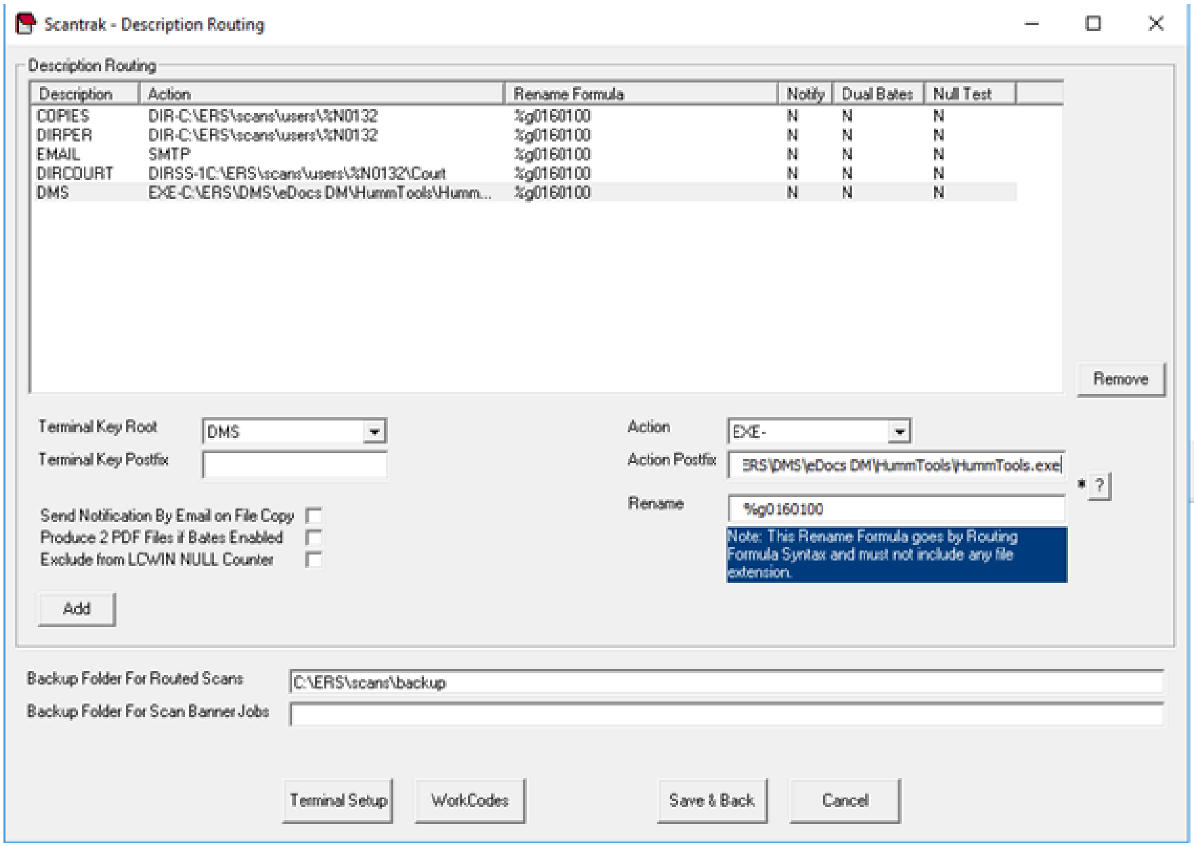


4. Click **Save & Back**.
5. Go to **Scantrak** again, and click **XMLRouting** at the bottom.
6. Define the route for eDocuments by doing the following:
   a. In the **Terminal Key Root** field, select **DMS**.
   b. In the **Action** field, select **EXE**.
   c. In the **Action Postfix** field, enter C:\ERS\DMS\eDocs DM\HummTools\HummTools.exe.

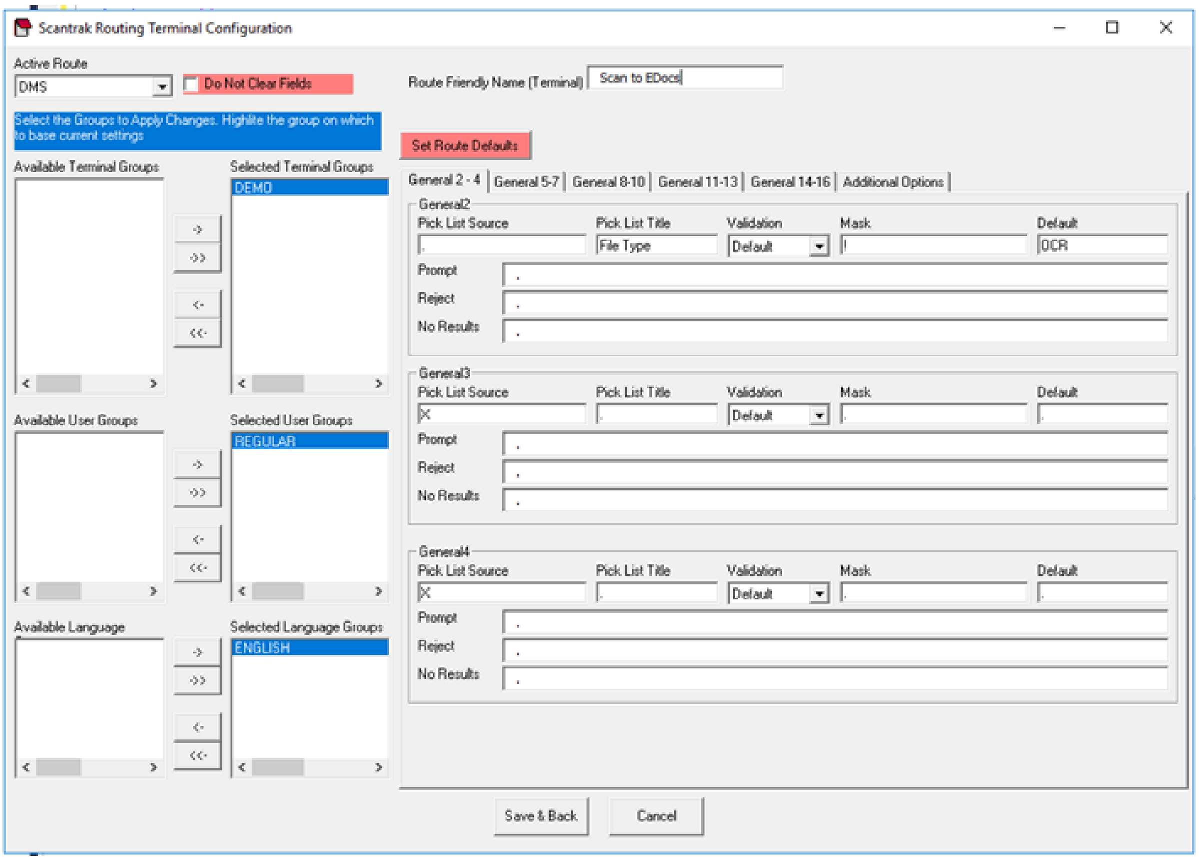
      Verify that you have HummTools.exe in this location.

   d. In the **Rename** field, enter %g0160100.
   e. Click **Add**.

The routing formula is added as shown below.



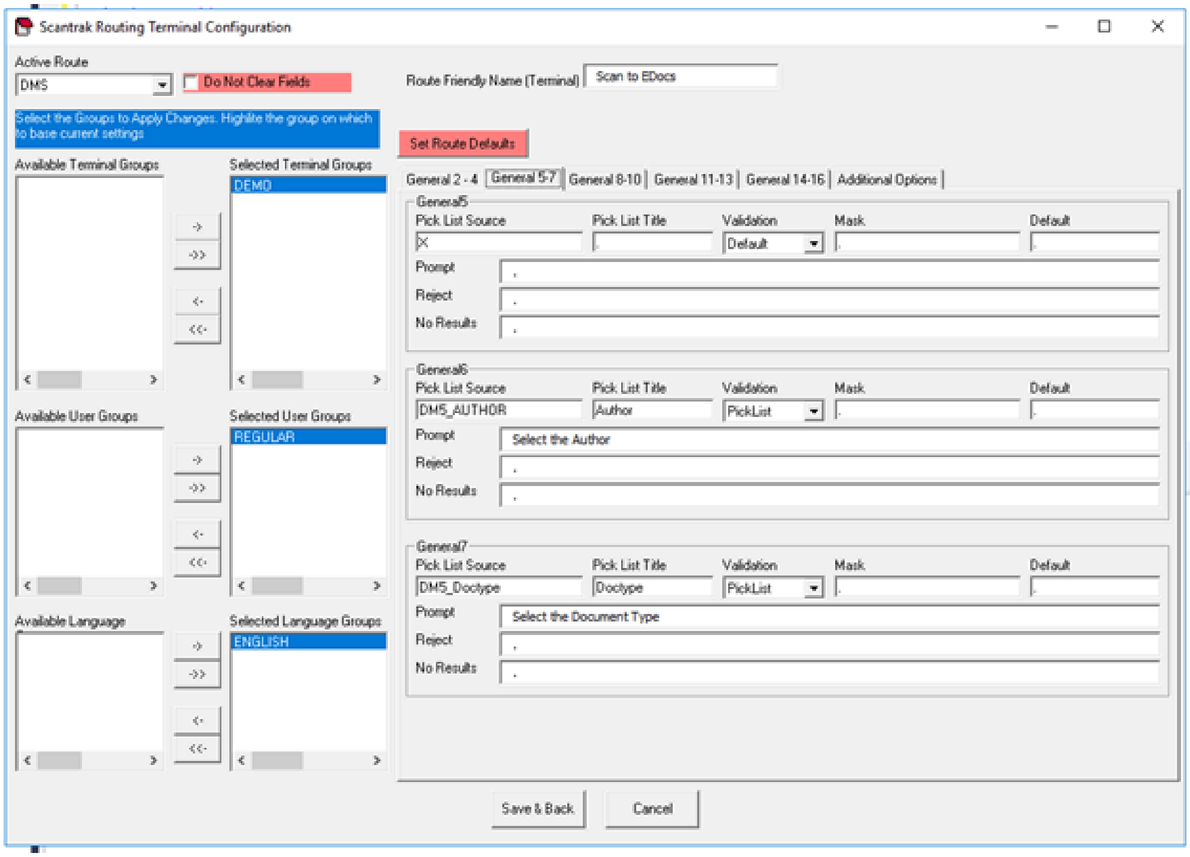
7. Click **Save & Back**.
8. Go back to **Scantrak**, and click **XMLRouting** again.
9. Set the Terminal Setup values for the route by doing the following:
    a. Select **DMS**.
    b. At the bottom of the **Scantrak - Description Routing** screen, click **Terminal Setup**.
    c. In the **Active Route** field, select **DMS**.
    d. Select the Terminal, User and Languages groups for the corresponding **Selected Terminal Groups**, **Selected User Groups** and **Selected Language Groups**.
    e. Click **Set Route Defaults**.



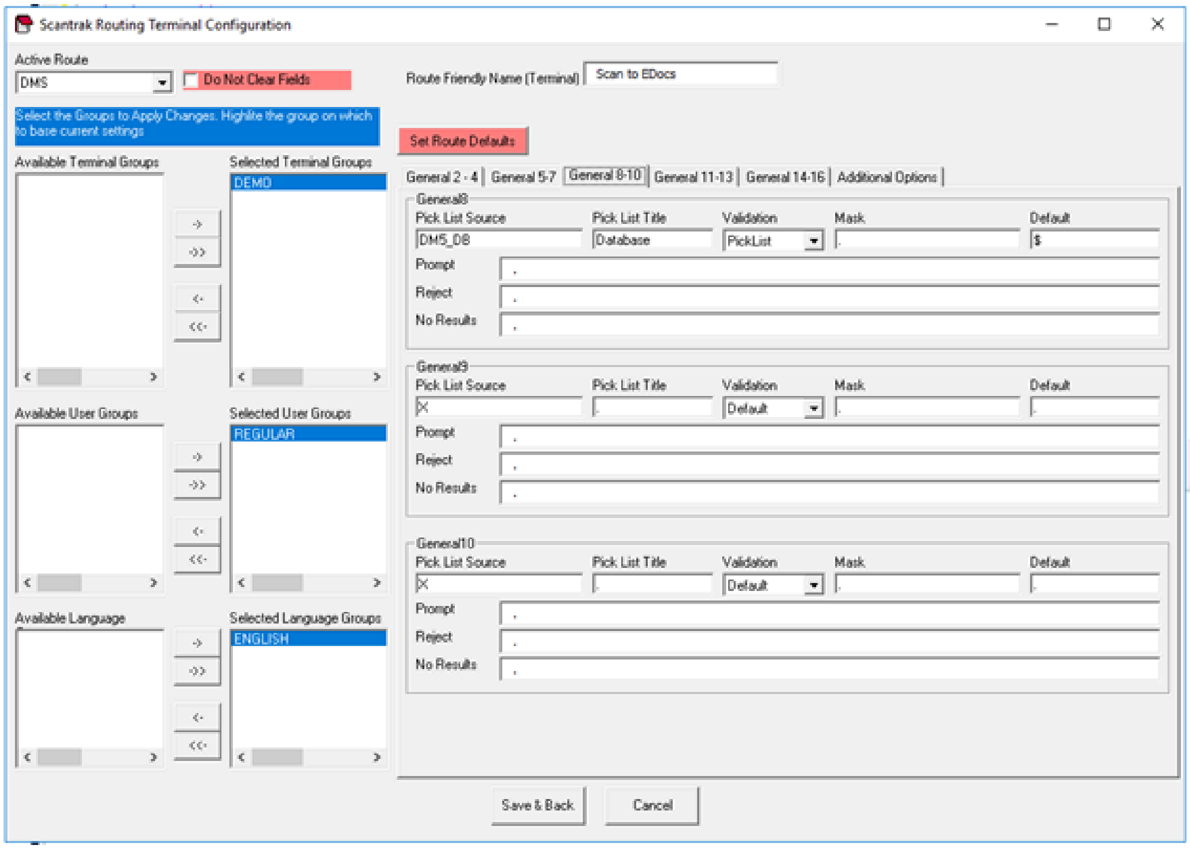
General2 defaults to OCR. You can change it from the preview screen.
General6 pulls up the DM5_AUTHOR User Profile for a pick list.
General7 pulls up the DM5_DOCTYPE User Profile for a pick list.

ⓘ The value of the Pick List Source should match the value inserted in the User Profile table.

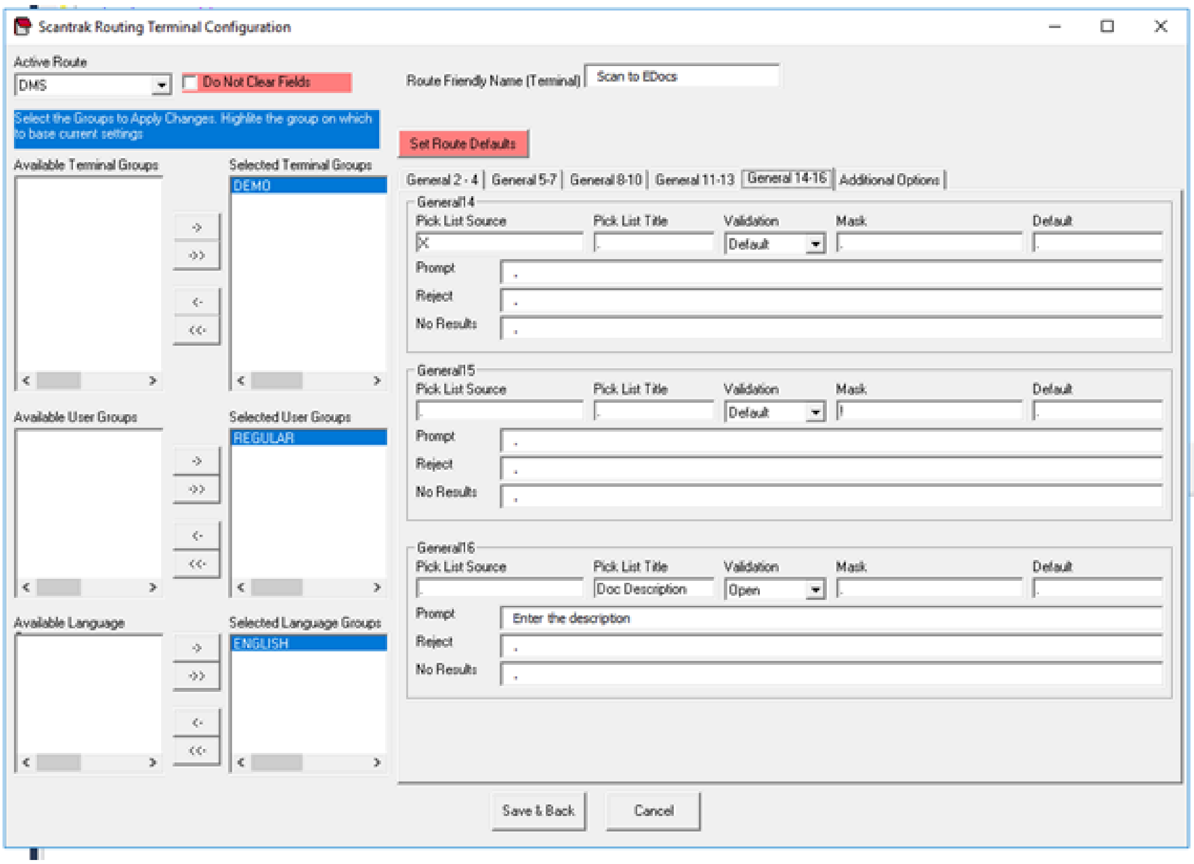
Change the values as shown below:



General8 is pulled from a user ID specific profile. You can insert database in the User Profile table in the same way as Doc_type and Author are inserted. Setting up this feature will pick the corresponding database for the logged-in user. In this example, the database is not prompted for, but is set based on the user's office location via a User Profile.



General16 prompts the user to specify the DM5 Description.



10. Click **Save & Back**.

Other terminal settings and notes

1. Set GlobalPasswords to Y to prompt for the LDAP Password only once. To make this feature work, add the following line to winers.ini.

```
[LCWIN SERVER]
StorePasswords=Yes
[LCWIN LDAP] LDAPRoot=LDAP://your_ldap_server_id/DC=example,DC=COM
LDAPUser=ldap_user_name@example.com
LDAPPassword=ldap_user_password
```

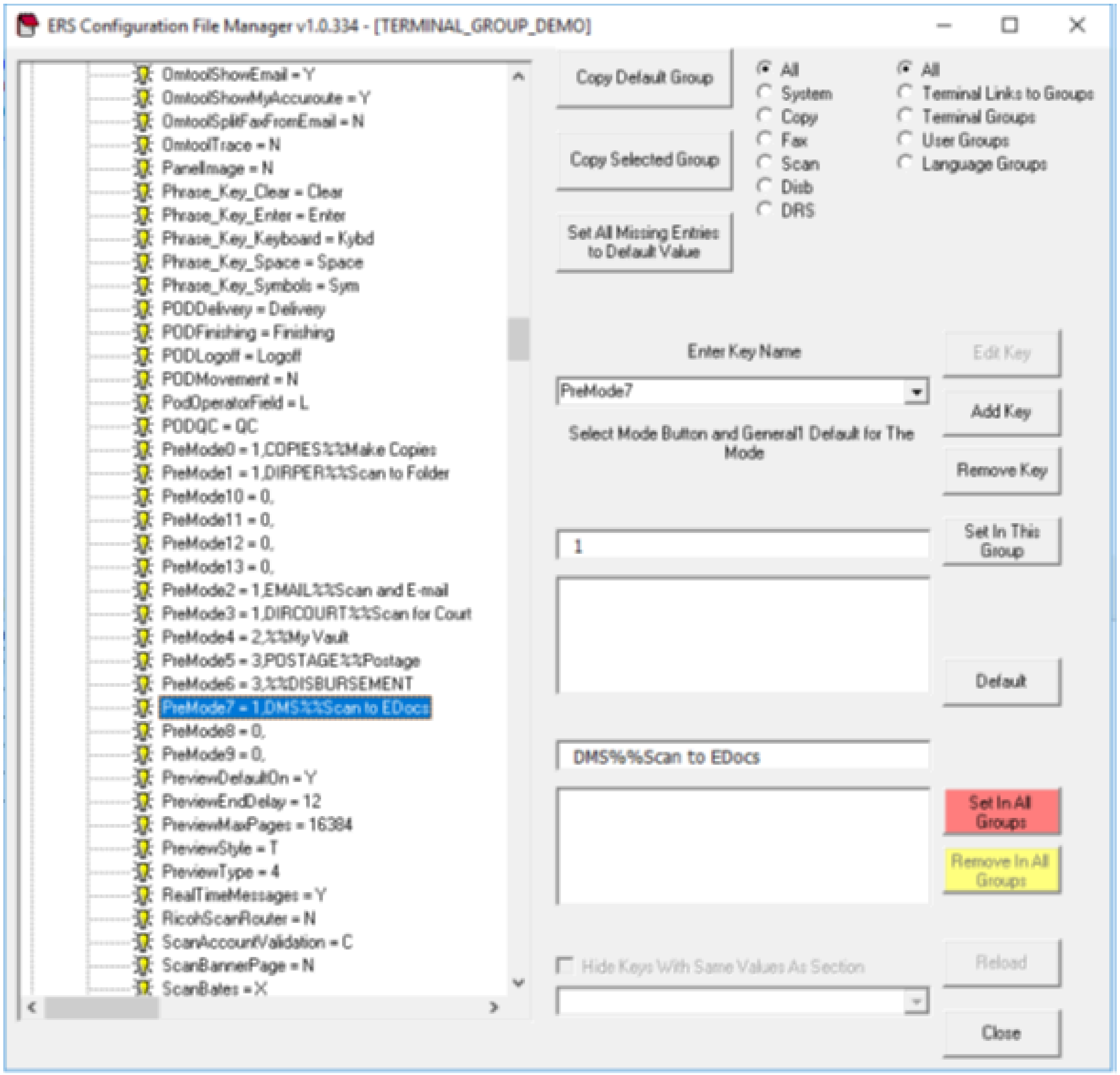
2. Create a LCWIN_SESSIONS folder under the Logpath (specified in winers.ini by Logpath=`C:\ers\erslogs`).

   This is where passwords are stored, and the folder is not created automatically.

Setting up Scan To eDocs

1. Open Config File Manager.
2. Go to **Terminal/User**. Expand the Terminal group where you want to set up.

3. Go to an empty pre-mode and select it.
4. Enter the values as shown below.



5. Click **Set In This Group**.
The values entered reflect in the left column for the corresponding pre-mode.

Setting up HummTools.exe

The installation of eDocuments Scan Connector replaces the latest HummTools.exe and dependent libraries in `C:\ERS\DMS\eDocs DM\HummTools\`.

1. Set the following values in the HummTools.exe.config file under the **app settings** section:
   a. Set the user and password of the server.
   ```
   <add key="User" value="testuser" />
   <add key="Password" value="testuser" />
   ```
   b. Set the database/library.
   ```
   <add key="DataBase" value="Legal" />
   <add key="Library" value="Legal" />
   ```
   c. Set the Client-Matter values.
   ```
   <add key="MatterOnly" value="true" />
   <add key="ClientMatterSplitter" value="-" />
   <add key="Client" value="Client" />
   <add key="Matter" value="Matter" />
   ```
   d. Set the path where files are copied if the scan process fails.
   ```
   <add key="FailCopyFilePath" value="C:\ers\scans\failed" />
   ```
   e. DocNameTimeStamp is true, and it appends the time stamp to the file name.
   ```
   <add key="DocNameTimeStamp" value="false" />
   <add key="LoginType" value="0" />
   ```
   f. Type_id corresponds to Doc_type set to picklist in General7.
   ```
   <add key="Type_ID" value="GENERAL7" />
   ```
   g. Need to have the extension of document and the corresponding application.
   ```
   <add key=".PDF" value="ACROBAT" />
   ```
   h. DocName corresponds to the Document name set already for General16 field.
   ```
   <add key="DocName" value="GENERAL16" />
   ```
   i. Author_id corresponds to the Author picklist set already for General6 field.
   ```
   <add key="Author_ID" value="GENERAL6" />
   <add key="DocSource" value="TERMTYPE" />
   ```
   j. Domain is left commented since the value of Domain is used to login the user on the local machine. It reads the local domain of system and help in Logon Impersonation.
2. Set the following values in the HummTools.exe.config file under the **properties_map** section:
```
<Property Name="CLIENT_ID" Value="%CLIENT_ID%" />
   <Property Name="MATTER_ID" Value="%MATTER_ID%" />
   <Property Name="DOCNAME" Value="GENERAL16" />
   <Property Name="AUTHOR_ID" Value="GENERAL6" />
   <Property Name="TYPE_ID" Value="GENERAL7" />
   <Property Name="APP_ID" Value="%APP_ID%" />
   <Property Name="TYPIST_ID" Value="%TYPIST_ID%" />
```
3. Set the log file path for attribute fileName="C:\ERS\LogFiles\HummTools.log" nlog section where the HummTools log file would be created.

A sample HummTools.exe.config is shown below.

```
<?xml version="1.0"?>
<configuration>
  <configSections>
    <section name="nlog" type="NLog.Config.ConfigSectionHandler, NLog"/>
    <section name="PropertiesMap" type="Copitrak.Hummingbird.Tools.PropertiesMap,
 HummTools"/>
  </configSections>
  <appSettings>
    <add key="User" value="testuser" />
    <add key="Password" value="testuser" />
 <add key="DataBase" value="Legal" />
    <add key="Library" value="Legal" />
    <add key="MatterOnly" value="true" />
    <add key="ClientMatterSplitter" value="-" />
    <add key="Client" value="Client" />
    <add key="Matter" value="Matter" />
    <add key="FailCopyFilePath" value="C:\ers\scans\failed" />
    <add key="DocNameTimeStamp" value="false" />
    <add key="LoginType" value="0" />
    <add key="Type_ID" value="GENERAL7" />
    <add key=".PDF" value="ACROBAT" />
    <add key="DocName" value="GENERAL16" />
    <add key="Author_ID" value="GENERAL6" />
    <add key="DocSource" value="TERMTYPE" />
    <add key="Subject" value="Your scan has been profiled"/>
    <add key="BodySuccess" value=""/>
    <add key="BodyFailed" value=""/>
    <add key="SendNotification" value="true"/>
    <add key="MailFromName" value="Copitrak Scan"/>
    <add key="MailFromAddress" value="anshuman.shukla@kofax.com"/>
    <add key="MailServer" value="smtp.office365.com"/>
  </appSettings>

  <PropertiesMap>
    <Properties>
   <Property Name="CLIENT_ID" Value="%CLIENT_ID%" />
   <Property Name="MATTER_ID" Value="%MATTER_ID%" />
   <Property Name="DOCNAME" Value="GENERAL16" />
   <Property Name="AUTHOR_ID" Value="GENERAL6" />
   <Property Name="TYPE_ID" Value="GENERAL7" />
   <Property Name="APP_ID" Value="%APP_ID%" />
   <Property Name="TYPIST_ID" Value="%TYPIST_ID%" />
    </Properties>
  </PropertiesMap>



  <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\HumTools.{###}"
              archiveNumbering="Rolling"
              maxArchiveFiles="10"
              fileName="C:\ERS\LogFiles\HummTools.log"
              openFileCacheTimeout="30"
              optimizeBufferReuse="true"
```

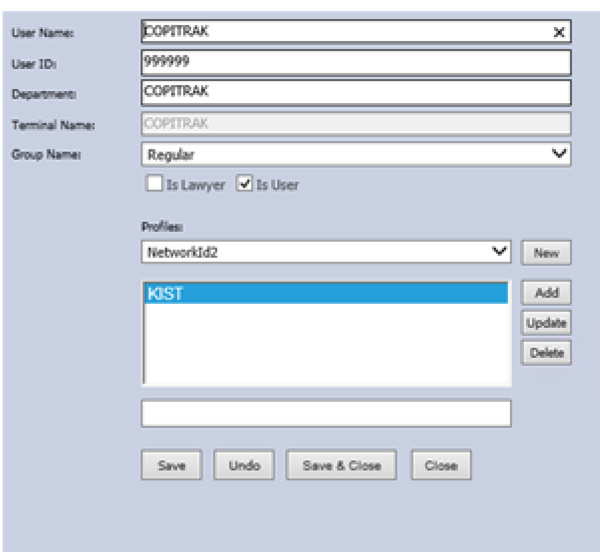
```
              autoFlush="true"
              layout="${longdate} ${level:padding=-5} ${logger} [${ndc}] -
 ${message}" />
    </targets>
    <!-- rules to map from logger name to target -->
    <rules>
      <!--All logs, including from Microsoft-->
      <logger name="*" minlevel="Info" writeTo="logfile" />
    </rules>
  </nlog>

  <startup>

  <supportedRuntime version="v2.0.50727"/></startup>
</configuration>
```

Setting up a user and account

1. Open CSS Manager.
2. Navigate to **Lists** > **Validation Lists** > **User**.
3. Click **Master** and edit the user that you want to use for eDocuments login.
4. In the **Networkid2** field, set any of the network IDs retrieved from the eDocuments SQL server. The query used to retrieve network is `SELECT * FROM [Legal].[DOCSADM].[NETWORK_ALIASES]`.

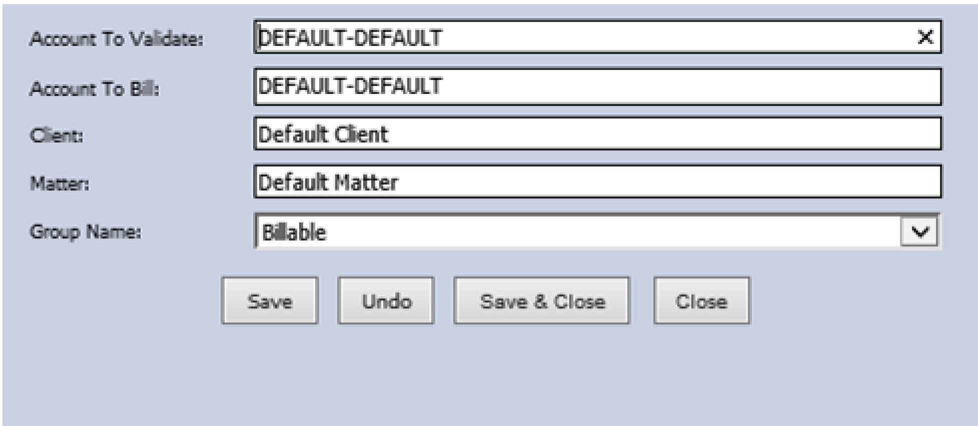
	SYSTEM_ID	NETWORK_ID	NETWORK_TYPE	PERSONORGROUP	PARENT_ORG	LAST_UPDATE
1	1835	QA1\DOCS_USERS	8	0	NULL	2019-01-14 11:49:10.347
2	1836	QA1\DOCS_SUPERVISORS	8	1	NULL	2019-01-14 11:49:10.350
3	1911	QA1\TT	8	1910	0	2019-01-14 11:49:25.360
4	2044	QA1\KIST	8	2040	2043	2019-01-17 11:43:25.893

The value should be taken from the value after QA1\. Here is an example:



5. To add a new account, navigate to **Lists** > **Validation Lists** > **Account**.

6. Click **Master** and add the new account.
7. Check for Client and Matter in the eDocuments SQL server.
   The query used for Client is: `SELECT *FROM [Legal].[DOCSADM].CLIENT`.
   The query used for Matter is: `SELECT *FROM [Legal].[DOCSADM].matter`.
   Here is an example:



8. Restart the CtkServiceMan service.

Now you should be able to use Scan To eDocs to send documents to eDocuments server.

Log in at the server with the user whose networkid2 was set and the account code that was set earlier.

Setting up an email notification

The following values are configured in the HummTools.exe.config file to send an email notification:

```
<add key="SendNotification" value="true"/>
<add key="MailFromAddress" value="MailFromAddress"/>
<add key="MailServer" value="MailServer"/>
```

- **SendNotification**: Set this value to true to send a notification.
- **MailFromAddress**: This is the address which sends the email notification.
- **MailServer**: This is the mail SMTP server.

You can send an email notification in either of the following two methods:

- Open relay SMTP server:
  This method requires no authentication. You just need to set the above values in the config file.

  When doing open relay, remove smtpinfo.dat which stores the authentication credentials.

- Authentication SMTP server:

With this method, you need to create a credential file which stores the authentication information. Do the following:

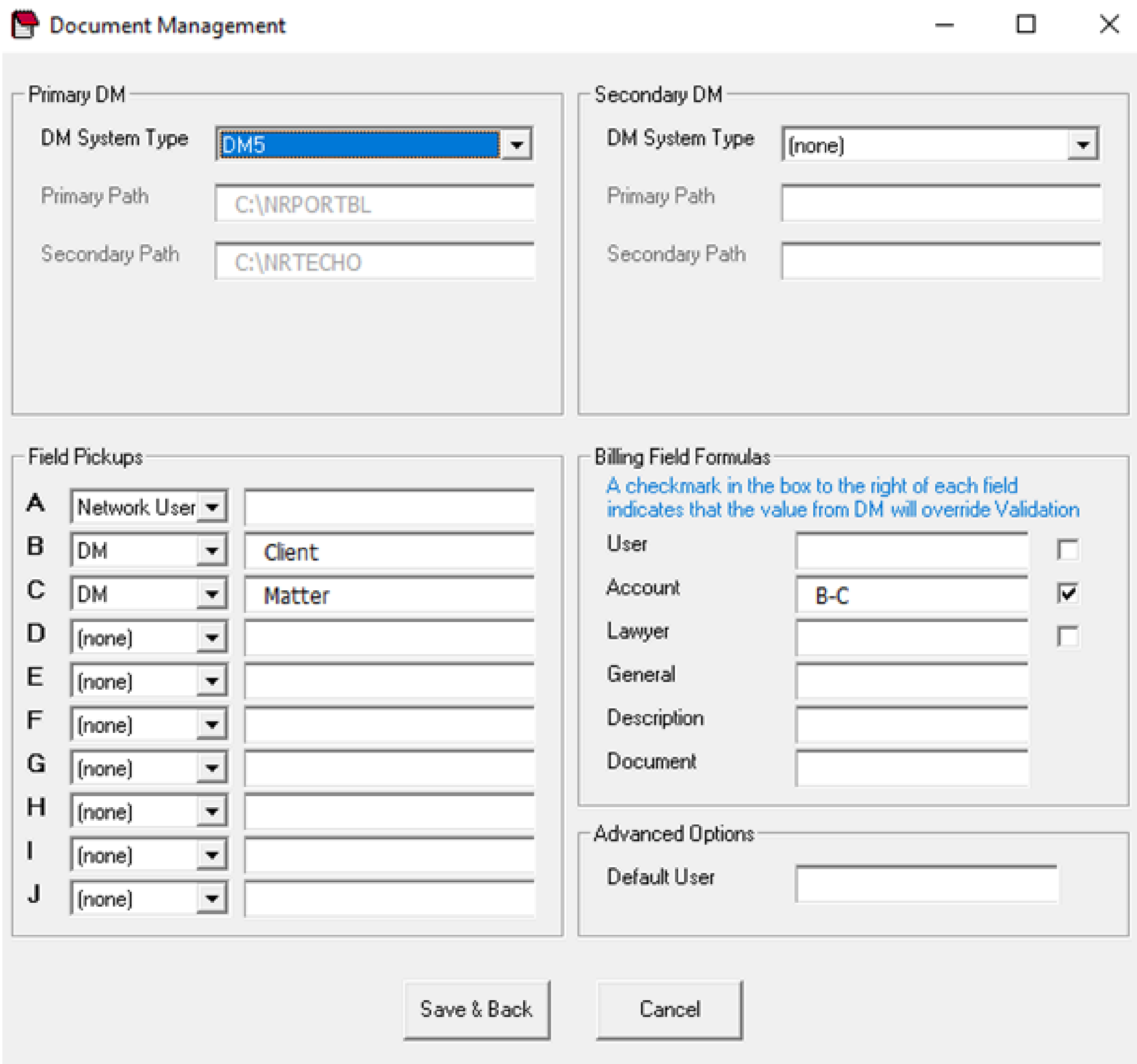
1. Run `C:\ERS\WINERS\smtp.exe -setauth` to set the authentication values.
   Authmode = 1
   Username = emailaddress
   Pass = pass
   Encryption = 1 (auto)
   Port = 587
   Doing this creates smtpinfo.dat file to store the credentials.
2. Set the values in the config file.
   SendNotification = true
   MailFromAddress = email address used in the authentication step above
   MailServer = smtp.office365.com

   If the email address you use differs from the one used in the authentication, you will not get the notification and an error message appears in the HummTools log.

Configuring Copitrak for the eDocuments Print Connector

Make sure that the Copitrak Desktop and eDocuments Print Connector are already installed.

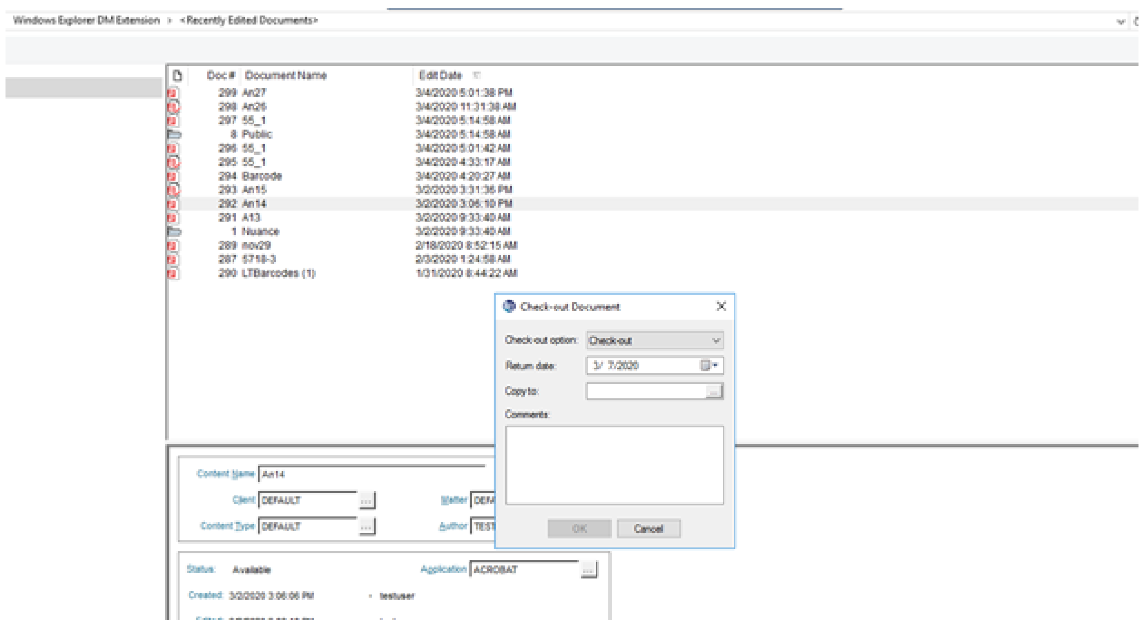
1. Open Config File Manager.
2. Go to **DMS Integration**.
3. In the **DM System Type** field, select **DM5**.
4. Set the **Field Pickups** as shown below.



5. In the **Account** field, enter B-C.
6. Click **Save & Back**.
   These settings will update the LT2005_SETTING.INI file as below:

```
[AUTOVALIDATION]
FormulaAType=N
UserFormulaOpenComFail=N
DocumentManagementSystem1=DM5
DocumentManagementSystem2=(none)
FormulaBType=D
FormulaBField=Client
FormulaCType=D
FormulaCField=Matter
FormulaDType=X
FormulaEType=X
FormulaFType=X
FormulaGType=X
FormulaHType=X
FormulaIType=X
FormulaJType=X
LawyerFormulaOpenComFail=N
AccountFormula=B-C
AccountFormulaOpenComFail=Y
POWERDOCS_ClientLevel=0
PCDOCS_DIRECT=N
PCDOCS_UNIX=N
IMANAGE_AllUsers=N
```

7. Restart Copitrak Desktop on the client machine to apply the above configuration.
8. To print a document, do the following:
   a. Open the Windows Explorer DM Extension.
   b. Go to the section where you want to print the document.
   c. Right-click on the file to print.
   d. Select **Checkout**.
      The **Check-out Document** window appears as shown below.



e. In the **Copy to** field, select the location where you want to check out the document on the local machine.

f. Click **OK**.
   The file would be checked out in the specified location. The file name details correspond to the library name, document number, version information and document name.
   For example, if you check out file An15, the checked-out file name is LEGAL-#293-v1-An15.PDF.

g. Open the file and select **Print**.
   The Client and Matter are populated.