

# Kofax Copitrak iManage 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 iManage Connector. Use this guide to get started with the software and become familiar with the product features.

## 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:

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Type your search terms or phrase into the **Search** box, and then click the search icon.
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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

# Prerequisites

The Kofax Copitrak iManage Connector is used to communicate with the iManage server. The iManage server can be a cloud server or a local server hosted on a Windows machine.

The iManage Connector supports two different mechanisms to communicate with iManage server:

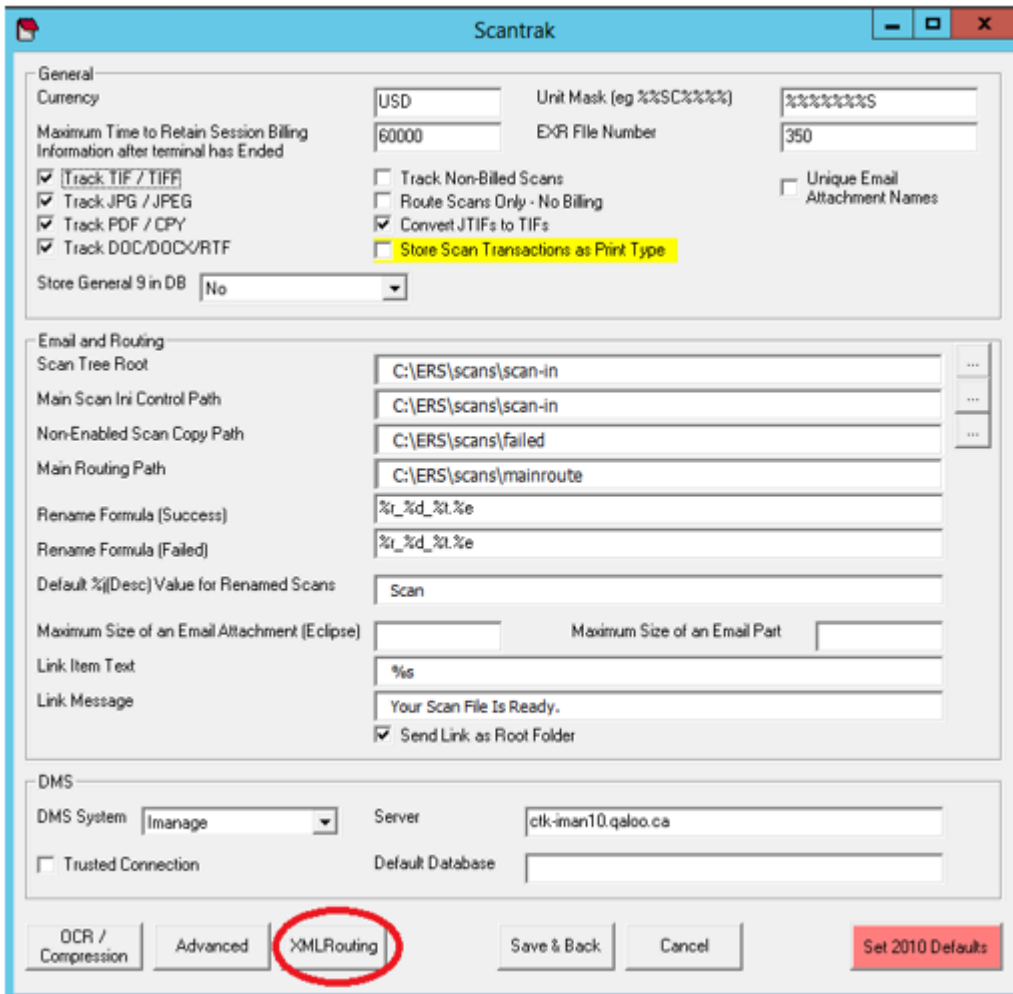
- COM interface to communicate with iManage server using iManage Client (commonly known as iManage DeskSite/WorkSite).
- REST API to communicate with iManage server directly via REST calls.

Before starting with the installation and configuration, confirm the following information with iManage:

1. iManage server name or IP address.  
If you are using Cloud iManage, the address is cloudimanager.com.
2. Login credentials to the iManage server.
3. For connection to an iManage server over a COM interface, the iManage.dll (x86) 9.3.x must be registered. The installation of the worksite automatically registers the iManage.dll. If worksite 9.3.x (DeskSite 9.3.x (x86) or FileSite 9.3.x (x86) etc.) is installed, iManage.dll is registered automatically.
4. For REST API communication, the iManage administrator must provide the client ID and client secret for the Copitrak application as registered on the iManage server.
5. Copitrak CSS Server 700R2 SP2.17 or 700R3 is required.

## Configuration steps

1. Configure the server name and the default database (if applicable).  
Log in to Kofax Copitrak **Config File Manager**, go to the **Scantrak** configuration page, and then configure the server and the default database name as shown below.



**i** If no default database is specified and iManage server has multiple databases, you are prompted to select a database in the Eclipse/Edge workflow.

**2.** Update the iManageCommonSettings.config for the iManage server and the database.

For example:

```
<add key="Server" value="your_iManage_server_ip_or_name" />
<add key="Database" value="default_database_if_applicable" />
```



## Chapter 2

# Components and common settings

Kofax Copitrak iManage Connector consists of the following primary components:

- iManHelper.dll - Provides read access to iManage DMS.
- DMSPlugin.dll - Loads iManHelper.dll into LcWinService.exe in the context of a session in which a user browses DMS folders.
- iManTools.exe - Uploads scanned documents to a DMS folder and sends upload notification emails.

Both iManHelper.dll and iManTools.exe are governed by the following configuration files which are further detailed in the subsequent sections of this document:

- %programdata%\Kofax\Copitrak\Config\CommonSettings.config - Provides a common place to configure global settings for Token Vault and logging.  
See [Configure Token Vault for use with iManage Scan Connector](#) for further details about Token Vault.
- %programdata%\Kofax\Copitrak\Config\iManageCommonSettings.config - Provides a common place for iManage specific settings.

## Chapter 3

# Kofax Copitrak iManage logs

The %programdata%\Kofax\Copitrak\Config\CommonSettings.config file contains settings for logging by DotNet assemblies that reference it.

Copitrak iManage produces the following log files:

- ERS\LogFiles\lcwin\LcWinDotNet.log - Contains log messages from all DotNet assemblies running within LcWinService.exe, including IManHelper.dll, DMSPlugin.dll and LCWIN\_NET\_EXT.dll. Log settings are configured in CommonSettings.config.
- ERS\LogFiles\DMS\IManTools.log - Contains log messages from IManTools.exe. Log settings are configured in CommonSettings.config.
- C:\ERS\WINERS\debug\smtp\

## Chapter 4

# Kofax Copitrak iManage Scan Connector

Before installation, note that the Kofax Copitrak iManage Scan Connector installation requires LCWIN 2019.0.166 or above.

## Install the iManage Scan Connector

You can install the iManage 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 the files.
- Install the iManage Scan Connector in silent mode. Run the following command from an administrator command prompt:

```
msiexec /i iManScanInstaller.x.x.x.x.msi /qn
```

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

When the Scan Connector is installed, it appears in **Control Panel > Programs and Features** as **Kofax Copitrak iManage Scan Connector**.

## Uninstall the iManage Scan Connector

1. Find Kofax Copitrak iManage Scan Connector on the list of installed programs in **Control Panel > Programs and Features**.
2. Right-click **Kofax iManage Scan Connector**.
3. Click **Uninstall**.

## Configure the iManage Scan Connector

After installation, use the information in this section to configure the iManage Scan Connector.

### Login methods

1. Global Impersonation:

This method uses the NetworkID value from ERS and the global impersonation password from the iManageCommonSettings.config file.

**i** Global Impersonation is only available when you host your own iManage server. This login method does not apply to Cloud iManage.

## 2. Admin User:

This is a non-trusted authentication method that grants access to all workspaces.

User and Password are hardcoded in the iManageCommonSettings.config file.

```
<add key="User" value="UserName" />
<add key="Password" value="6wwVηoTLe2g=" />
```

## 3. Standard user:

This is the standard password validation in which the user's iManage username is added in the ERS configuration under the user's NetworkId profile.

The password is then prompted in the Eclipse/Edge user login workflow.

## Configure the DMS server

### 1. Open Config File Manager.

### 2. Press the **Scantrak** button.

### 3. Select **DMS System**.

### 4. Enter the DMS server name.

### 5. Enter the Default Database name.

This field is required only when you are not prompted for the database at the Eclipse terminal. The default database name is useful for sites that only have a single database selection.

Do not select **Trusted Connection** when using these login methods:

- Global Impersonation
- Non-trusted User
- Standard User

### 6. Open the iManageCommonSettings.config file from the %programdata%\Kofax\Copitrak\Config\ folder with Notepad or any other text editor.

### 7. Modify the server value in the configuration file (iManageCommonSettings.config). In section **appSettings**, type `<add key="Server" value="your DMS server name" />`.

### 8. Save and close the configuration file.

### 9. Open **Command Prompt**.

### 10. Browse to the ERS\DMS\iManage\Imantools folder.

### 11. Encrypt the global password:

- If you use COM integration, run the following command:

```
imantools -pwd "password"
```

- If you use REST integration, run the following command:

```
imantools -pwd "password" -client_id YOUR_REST_CLIENT_ID -client_secret
YOUR_REST_CLIENT_SECRET
```

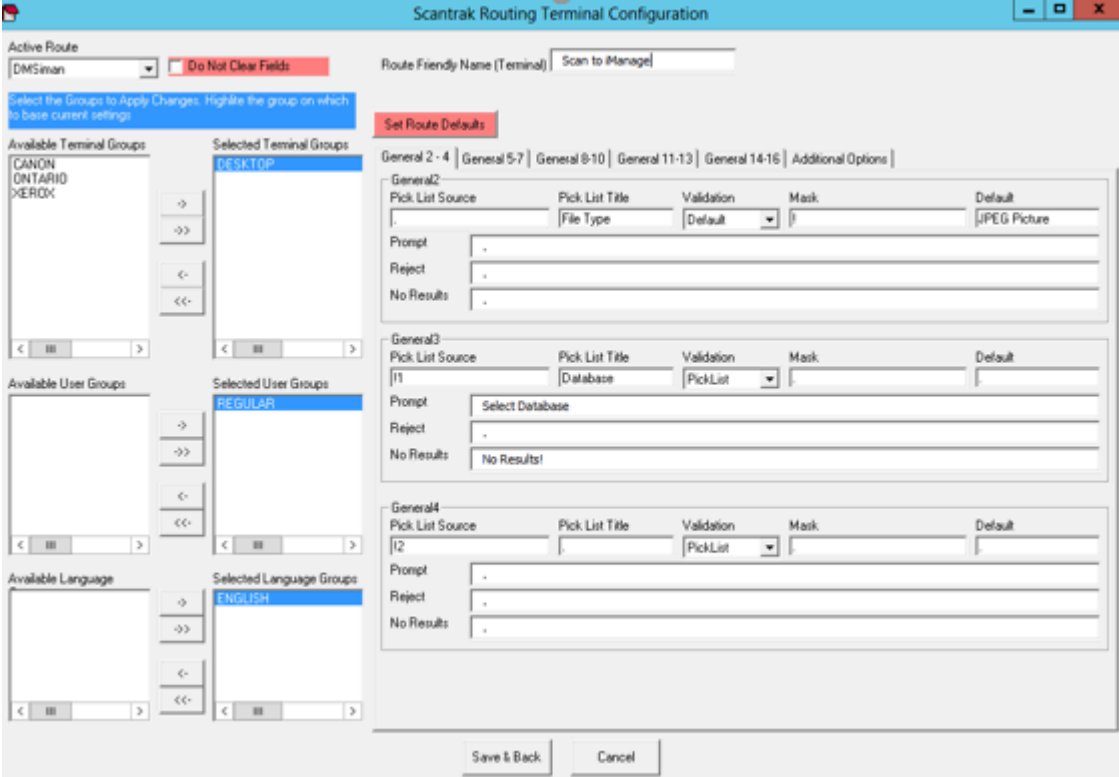
12. The encrypted values (password, client\_id, client\_secret) are displayed on the console.
13. Open the iManageCommonSettings.config file from the %programdata%\Kofax\Copitrak\Config\ folder.
14. Copy the encrypted values to their respective keys in the **appSettings** section of the config file.
15. Save and close the iManageCommonSettings.config file.

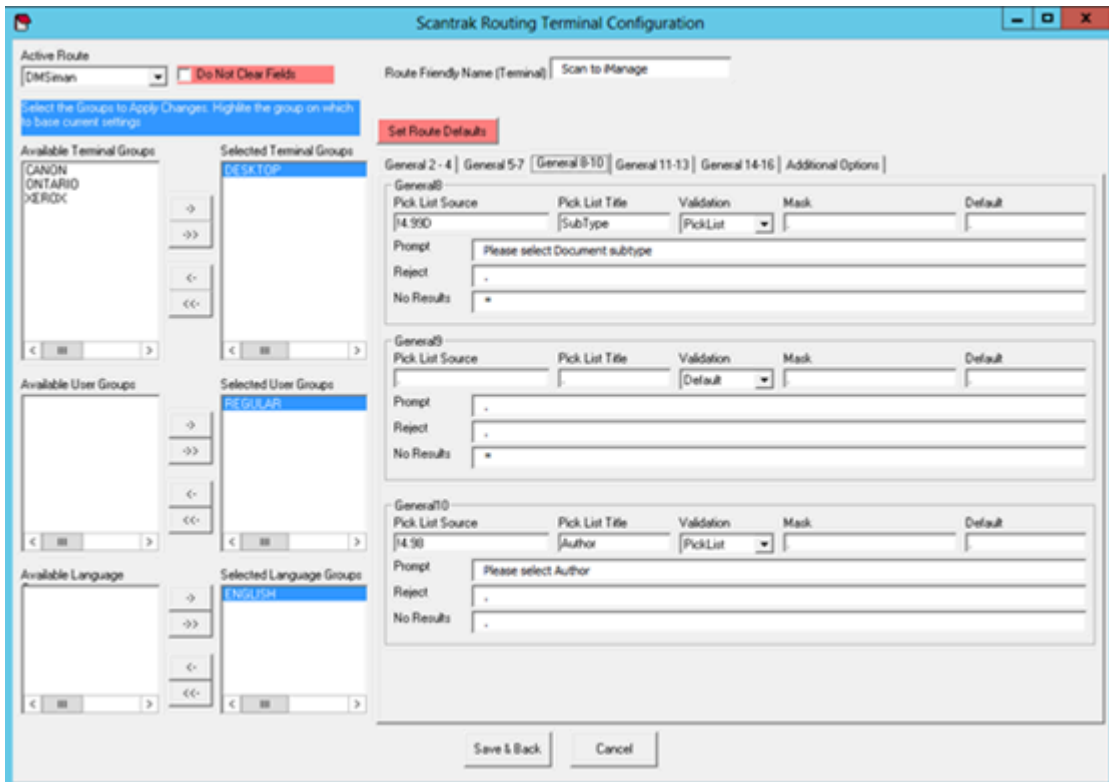
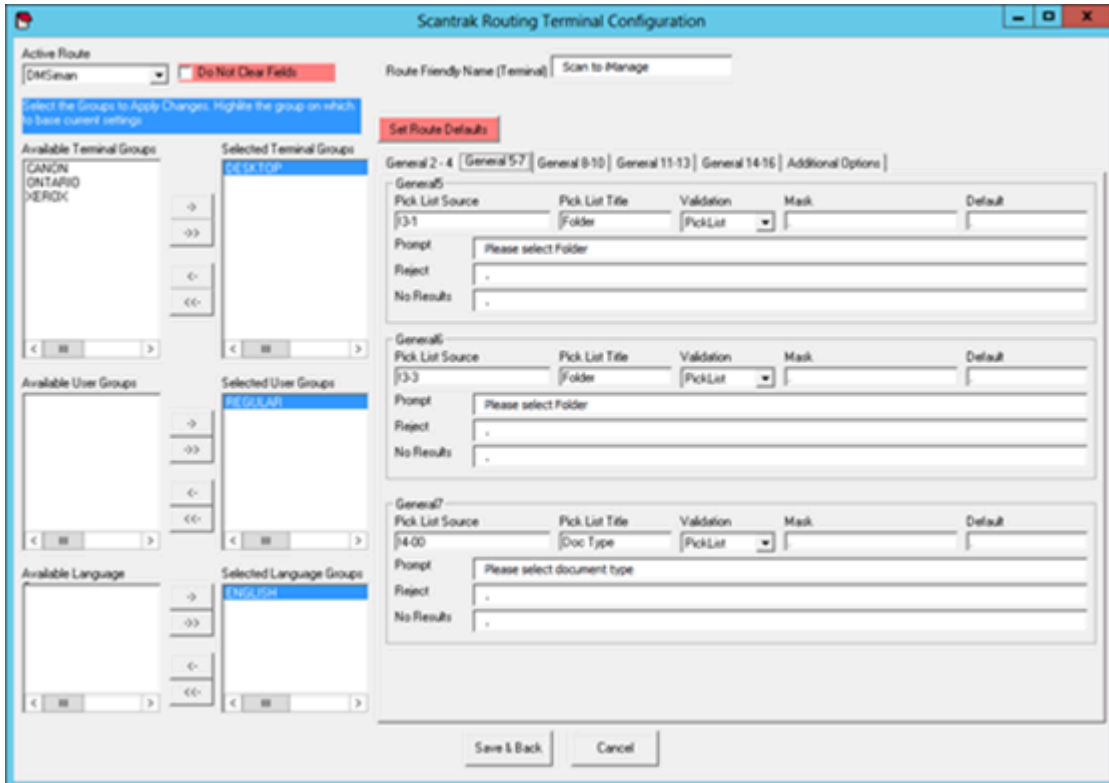
## Configure the DMS Route in Scantrak

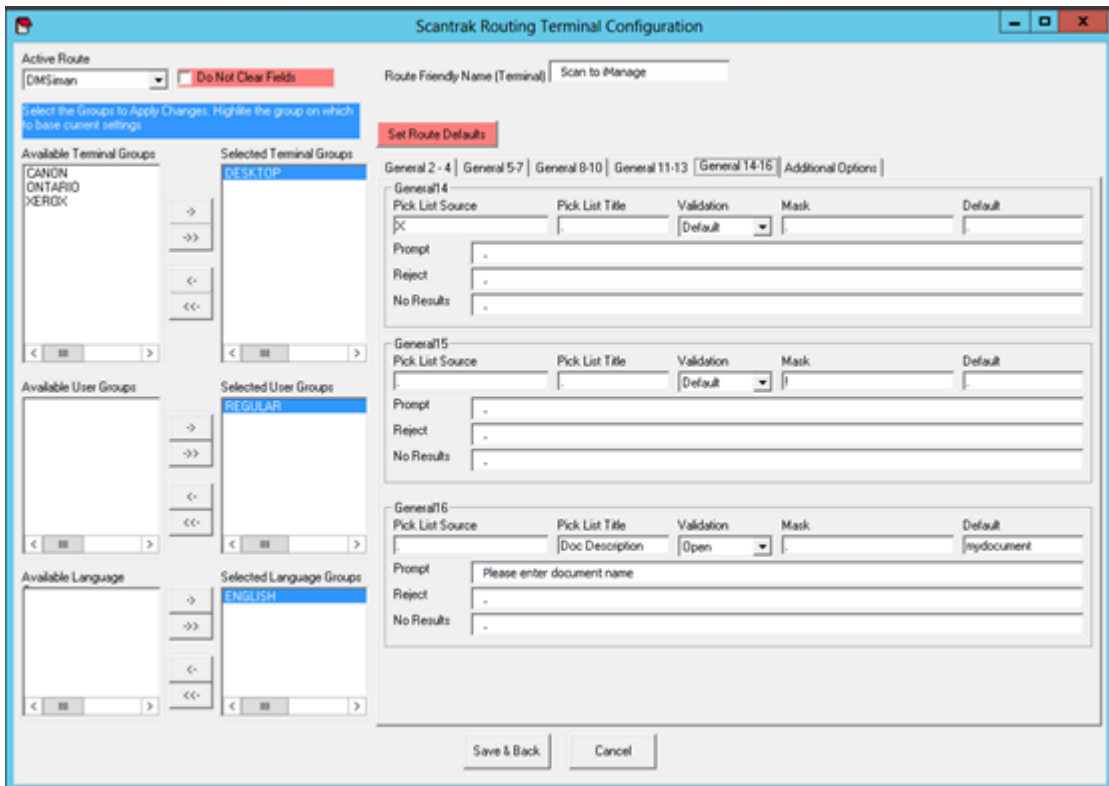
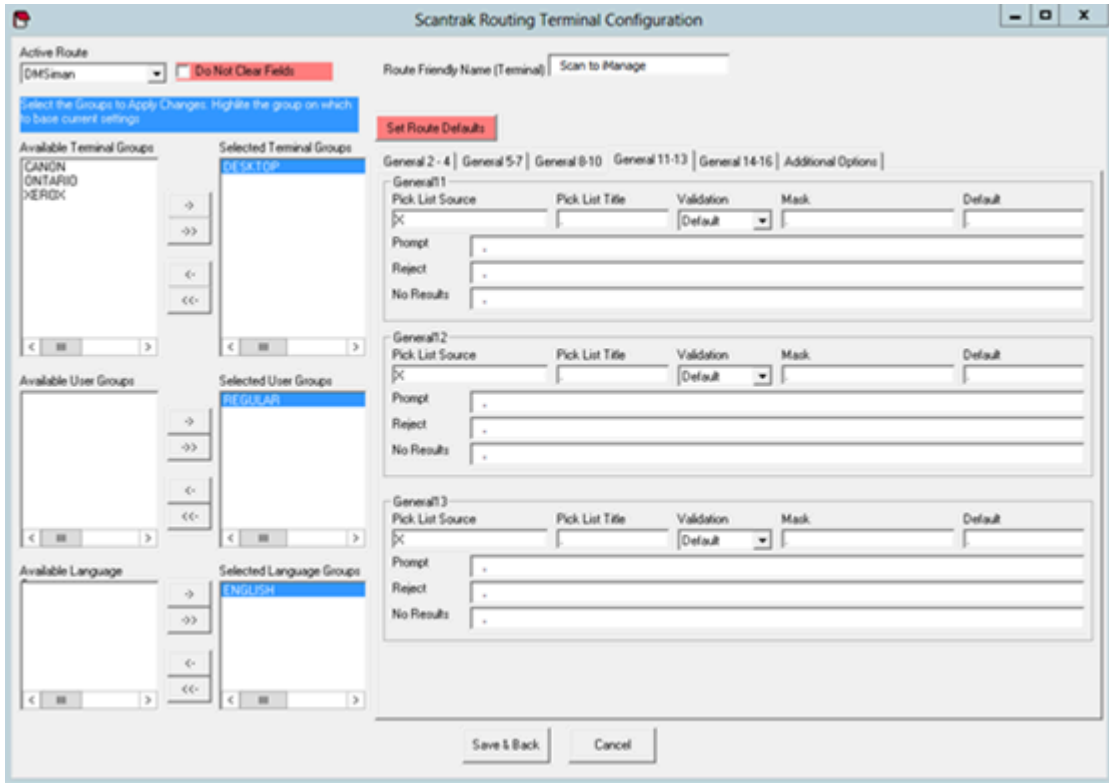
1. Open Config File Manager.
2. Press the **Scantrak** button.
3. Press the **XML Routing** button.
4. Add a route.  
Typically, DMS is used for the description.  
Action is EXE-"D:\ers\dms\iManage\imantools\imantools.exe". The drive letter must correspond to your setup.

## Configure the DMS Route Prompts on Eclipse

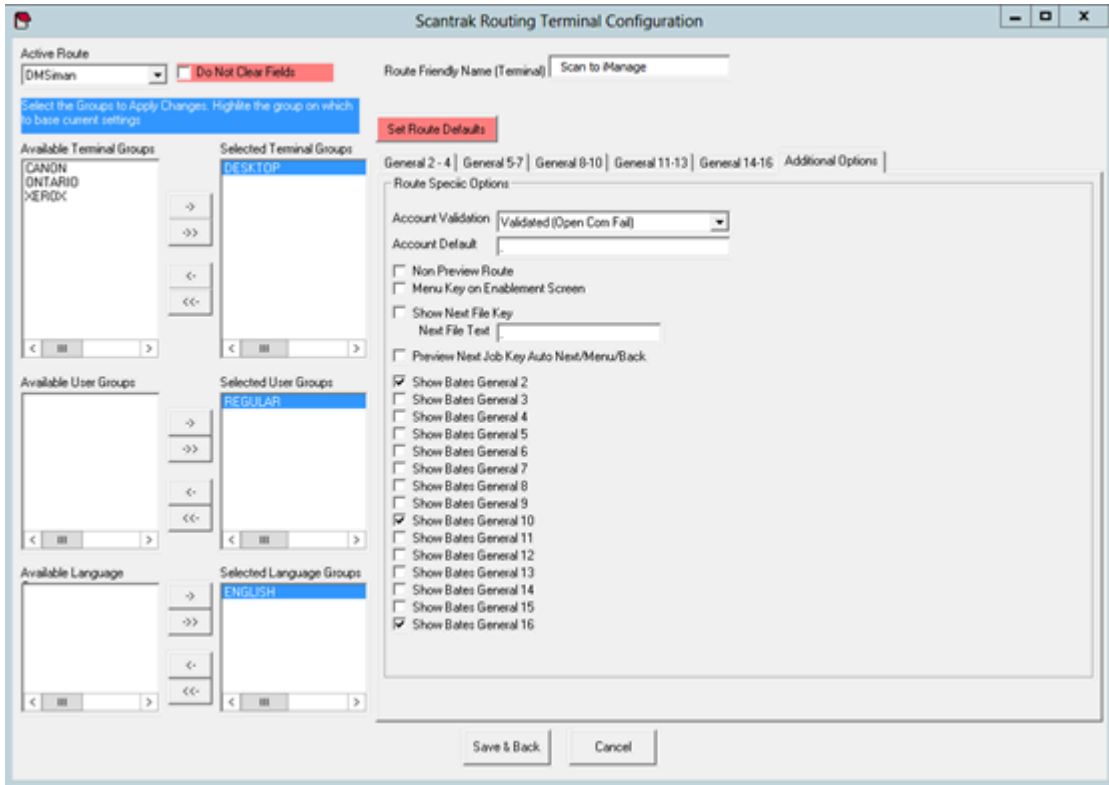
1. Open Config File Manager.
2. Press the **Terminal/User Options** button.
3. Expand the default User group.
4. Set **General1PickXX** to value "1".
5. Set **General1Pick0** to value "DMS%%Scan to iManage".
6. Click **Close**.
7. Press the **Scantrak** button.
8. Click **XML Routing**.
9. Press the **Terminal Setup** button.
10. Select **DMS** for Active Route.
11. Select the appropriate Terminal group, User group, and Language group.






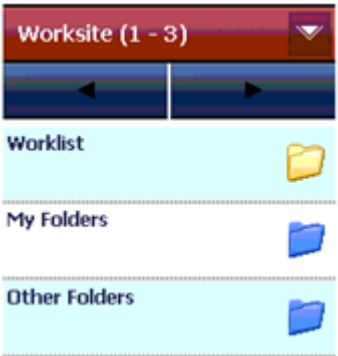







12. Make changes based on the selected mode: workspace, flat space or my matters mode.

Picklist Source	Description
!0	<p>Server Selection. Returns a list of available servers from iManage.</p> <p><b>i</b> Not required when only one server exists. Reads default server winners.ini.</p>
!1	<p>Database Selection. Returns a list of available databases on the server selected.</p>
!2	<p>Workspace Selection. Returns all available workspaces for the selected client-matter.</p>
!2-1	<p>My Matters Mode. Returns all folders/Workspaces/shortcuts in selected users My Matters container from iManage.</p> <p><b>i</b> This mode must be used with user impersonation login.</p>

!2-2	Flatspace (prompt is auto skipped since result list always contains 1 item).
!2-XXD	<p>Any of the above modes with default database read from winers.ini section:          [DMS SERVER OPTIONS]          Database=XXX          For example: !2-00D, !2-01D, !2-02D</p> <div data-bbox="902 548 1451 611" style="background-color: #e0f2f1; padding: 5px; border: 1px solid #ccc;"> <p> !2-00 is the same as !2.</p> </div>
!2-00DXXX	<p>Workspace Selection with the default database. Replace XXX with the database name.          For example: !2-00DACTIVE with "Active" as the database name.</p>
!3	<p>Folder Search.          This search returns all available folders within the workspace. If a folder contains a subfolder, it is displayed as folder\subfolder.</p>
!3-1	<p>Folder Selection.          Returns all root folders within a workspace.          Flatspace Mode: In Flatspace mode (!2-2), this list always contains 3 results.</p> <div data-bbox="889 1062 1224 1415" style="border: 1px solid #ccc; padding: 5px;">  </div>
!3-2	Search from Root folder selected in previous general field (!3 or !3-1).

<p><b>!3-3</b></p>	<p>Search from Root folder selected in previous general field (!3 or !3-1). This prompt only displays subfolders within the Root folders. It also allows the user to drill down to any folder within the tree. Prompt is reused to display the new folders within the previous selected folder.</p> <div style="border: 1px solid #add8e6; padding: 5px; background-color: #e6f2ff;"> <p> When in Flatspace mode, if the Worklist is selected, it indicates that a document is being scanned and sent to the Document Worklist in the iManage server, and this prompt is automatically skipped.</p> </div>
<p><b>!4-00</b></p>	<p>Document Class. Displays a picklist of all the available Classes that can be used on the Document profile. Optional parameters: !4-00D - Indicates to use default class if one is profiled on the selected destination folder.</p>
<p><b>!4.99</b></p>	<p>Document Sub Class. Displays a list of any available Documents sub classes based on the previously selected class. Optional parameters: !4-99D - Indicates to use default sub class if one is profiled on the selected destination folder.</p>
<p><b>!4.XX</b></p>	<p>Additional Properties required for Profiling. Replace XX with the Custom Field value in iManage. This can be obtained from a PRM file when printing a document. For example, department is usually Custom3 (! 4.03).</p>
<p><b>!4.98</b></p>	<p>Author. Displays a list of all the available Author values from iManage.</p>

## Configure iManTools.exe

When you run iManTools.exe from the command line with the three parameters -pwd, -client\_id, -client\_secret, it encrypts your REST client ID and REST client secret. It prints the encrypted values for password, client\_id, and client\_secret on the console.

1. Open iManageCommonSettings.config file from the %programdata%\Kofax\Copitrak\Config\ folder.
2. Edit all values to reflect the corresponding General Field values as shown below.

```
<appSettings>
  <add key="Trusted" value="false" />
  <add key="Server" value="YOUR_IMANAGE_SERVER_NAME" />
  <add key="WorkSpace" value="GENERAL4" />
  <add key="WorkFolder" value="GENERAL5" />
</appSettings>
```

```

<add key="Author" value="GENERAL10" />
<add key="MatterOnly" value="false" />
<add key="Client" value="Client" />
<add key="Matter" value="Matter" />
<add key="ClientCode" value="true" />
<add key="ClientMatterSplitter" value="-" />
<add key="Description" value="GENERAL16" />
<add key="DocType" value="ACROBAT" />
<add key="Database" value="GENERAL3" />
<add key="DocClass" value="GENERAL7" />
<add key="DocSubClass" value="GENERAL8" />
<add key="imProfileCustom3" value="GENERAL9" />
<add key="DocSecurity" value="" />
<add key=".pdf" value="ACROBAT" />
<add key=".tif" value="TIFF" />
<add key=".rtf" value="WORD" />
<add key=".doc" value="WORD" />
<add key=".docx" value="WORD" />
<add key=".jpg" value="JPEG" />
<add key="Retries" value="1" />
<add key="DocSource" value="TERMTYPE" />
<add key="Smtphost" value="" />
<add key="Subject" value="Your scan has been profiled" />
<add key="BodySuccess" value="" />
<add key="BodyFailed" value="" />
<add key="DocNumberNRI" value="true" />
<add key="ClientSettingsProvider.ServiceUri" value="" />
<add key="Password" value="qmD6lAX6JkbelXHv1S9uZw==" />
<add key="PreventFlatSpaceFiling" value="true" />
<add key="ignore_ssl" value="true" />
<add key="rest_client_id" value="YOUR_ENCRYPTED_REST_CLIENT_ID" />
<add key="rest_client_secret" value="YOUR_ENCRYPTED_REST_CLIENT_SECRET" />
</appSettings>

```

3. Save and close the iManageCommonSettings.config file.

## Configure iManHelper.dll

1. Open iManageCommonSettings.config file from the %programdata%\Kofax\Copitrak\Config\ folder.
2. Edit all values to reflect the corresponding General Field values from below.

```

<appSettings>
<add key="server" value="YOUR_IMANAGE_SERVER_NAME" />
<add key="Trusted" value="false" />
<add key="ClientMatterSplitter" value="-" />
<add key="Client" value="Client" />
<add key="Matter" value="Matter" />
<add key="Mode" value="1" />
<add key="PreferredDatabase" value="false" />
<add key="MaxRowsForSearch" value="32" />
<add key="WorkspaceSearchType" value="Absolute" />
<add key="ignore_ssl" value="true" />
<!-- <add key="MatterLength" value="6" /> -->
<!-- <add key="ErsMode" value="ture" /> -->
<!-- <add key="ClientAttributeID" value="imProfileCustom3" /> -->
<!-- <add key="MatterAttributeID" value="3" /> -->
<!-- <add key="Encoding" value="10008" /> -->
<add key="ClientSettingsProvider.ServiceUri" value="" />
<add key="Password" value="qmD6lAX6JkbelXHv1S9uZw==" />
<add key="rest_client_id" value="YOUR_ENCRYPTED_REST_CLIENT_ID" />
<add key="rest_client_secret" value="YOUR_ENCRYPTED_REST_CLIENT_SECRET" />
</appSettings>

```

**i** If you use REST API, continue with the next step.

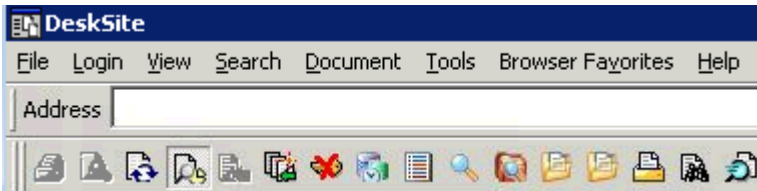
3. Copy the encrypted values of rest\_client\_id and rest\_client\_secret in the **appSettings** section.

## Configure the Client-Matter Formula

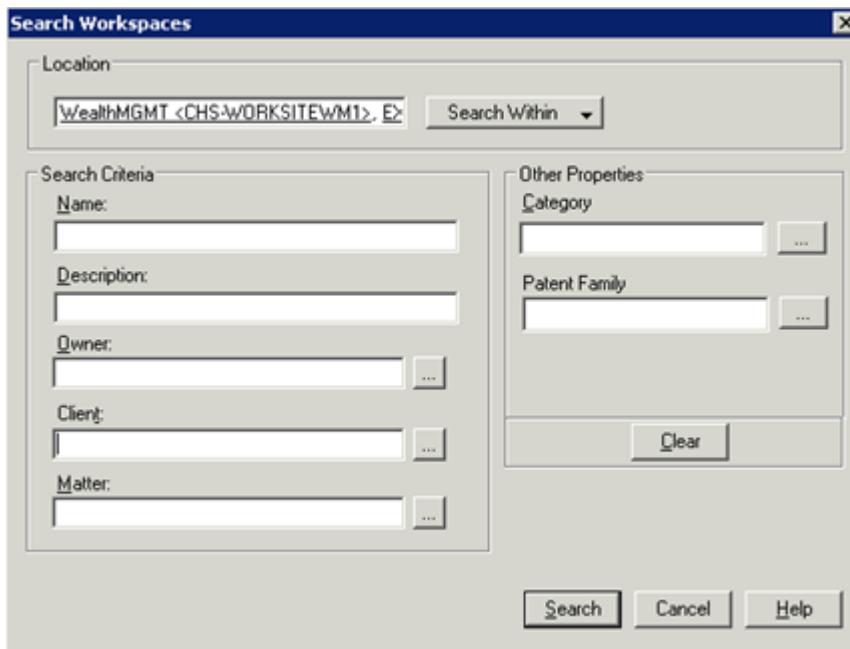
1. Verify the current client-matter structure in ERS.

Account to Validate	Account to Bill
2008021-0000	2008021-0000

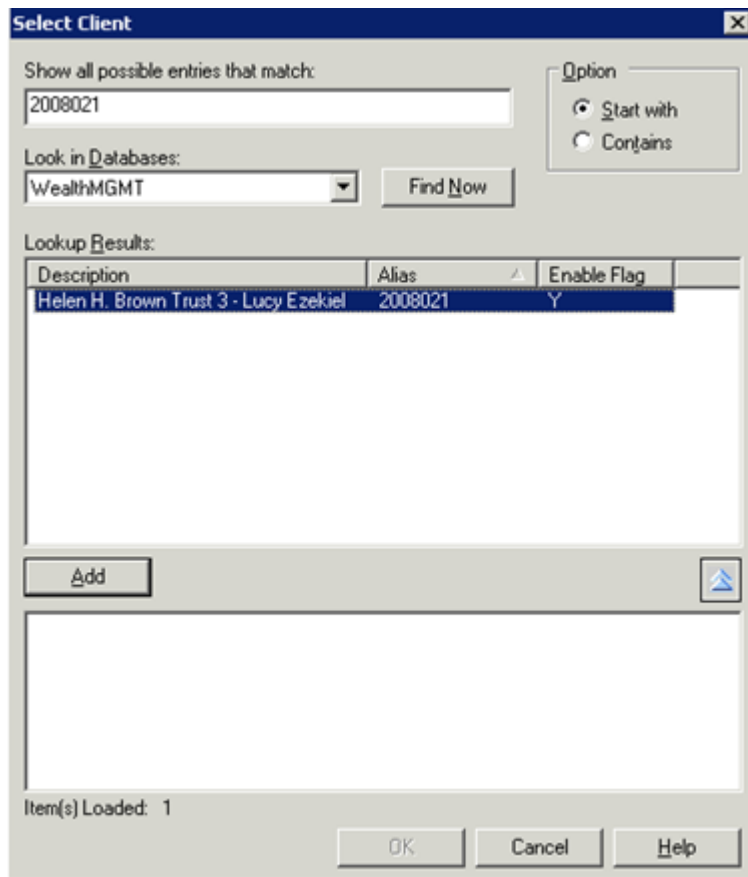
2. Verify the client-matter structure in Desksite/Filesite.
3. Open Desksite/Filesite and select **Search workspaces**.



4. Click the ellipsis button next to the **Client** field.

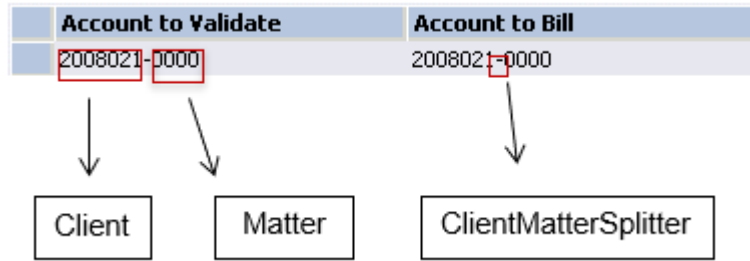


5. Enter "2008021" and click **Find Now**. Verify that the format is the same as ERS. Repeat the process for Matter.



6. Open iManageCommonSettings.config and modify the Client Matter formula as needed.

```
iManTools.exe.Config - Notepad
File Edit Format View Help
<?xml version="1.0" encoding="utf-8"?>
<configuration>
  <configSections>
    <section name="log4net" type="log4net.Config" />
    <section name="IManProfileAttributes" type="i
  </configSections>
  <appSettings>
    <add key="Server" value="CHS-WORKSITEWM1" />
    <add key="DataBase" value="GENERAL4" />
    <add key="workspace" value="GENERAL5" />
    <add key="workFolder" value="GENERAL7" />
    <add key="Author" value="GENERAL10" />
    <add key="Client" value="Client" />
    <add key="Matter" value="Matter" />
    <add key="ClientMatterSplitter" value="-" />
  </appSettings>
</configuration>
```



Example configuration:

If you have the following values on desksite:

- Client=2008021
- Matter=2008021-0000

Configure file values as the following:

```
<add key="Client" value="Client" />
<add key="Matter" value="Client+ClientMattersplitter+Matter" />
<add key="ClientMattersplitter" value="-" />
```

## Configure Token Vault for use with iManage Scan Connector

Token Vault is available to create possible workflows where user credentials are required but there is no prompt for credentials, such as scan workflows initiated from the embedded clients and completed by the CSS server.

### Register a new authorization provider for iManage in Token Vault

Before configuring Token Vault with iManage Scan Connector, make sure that you complete the Token Vault installation properly. After installing and configuring TokenVault, the following must be fulfilled on that system:

- You imported all certificates used or generated by TokenVault into the Personal certificate stores.
- You imported the Root CA certificate used or generated by TokenVault into the Trusted Root Certificate Authorities certificate stores.
- Those certificate stores are accessible to the TokenVault service. For more details, see the [Kofax Token Vault Installation Guide](#).

1. In your browser's address bar, open Token Vault manually by entering the Fully Qualified Domain Name of the computer where Token Vault is deployed along with the HTTPS port number.

For example, *https://computername.mydomain.com:8381/*.

The **Token Vault Login** page appears.

2. Log in to Token Vault with your Windows user name and password.

The **Token Vault Configuration** page appears.

3. Select the **Manage authorization providers** tab.

The **Manage authorization providers** page appears.

4. Click **Register new**.  
The **Select cloud provider** page appears.
5. Select **iManage Work** in the list.  
The **New iManage Work authorization provider** page appears.
6. Verify that the **Redirect URL** in this page is added under the **Redirect URL** in the iManage Control Center by doing the following.
  - a. Open iManage Work with your iManage Work User ID and Password.
  - b. In the drop-down menu next to the user, select **Control Center**.
  - c. Navigate to **Configure > System Setup > Applications**, select the application, and then go to **Authentication**.
  - d. Copy the **Redirect URL** in the **New iManage Work authorization provider** page to an empty **Redirect URL** field in the iManage Control Center.
7. On the **New iManage Work authorization provider** page, in the **Client ID** field, enter the **Client ID** from the iManage Control Center by doing the following.
  - a. In the iManage Control Center, navigate to **Configure > System Setup > Applications**, select the application.
  - b. Select **Configuration**.
  - c. Copy the **Client ID** value from this page to the Token Vault **New iManage Work authorization provider** page.
8. On the **New iManage Work authorization provider** page, in the **Client secret** field, enter the **Client secret** from the iManage Control Center by doing the following.
  - a. In the iManage Control Center, navigate to **Configure > System Setup > Applications**, select the application.
  - b. Select **Authentication**.
  - c. Copy the **Client Secret** value from this page to the Token Vault **New iManage Work authorization provider** page.
9. On the **New iManage Work authorization provider** page, in the **Server URL** field, enter the iManage server name.
10. Click **Save**.  
The new iManage Work authorization provider is registered.
11. On the **Manage authorization provider** page, click **Enable**.  
The new iManage Work authorization provider is enabled.

## Authorize the new authorization provider for iManage in Token Vault

1. On the **Token Vault Configuration** page, navigate to **Available authorization providers**.
2. In the **New iManage Work authorization provider** already registered section, click **Authorize**.  
You are redirected to iManage Work.
3. Log in with your iManage account.  
After the successful login, you get the message notifying that "You successfully authorized this provider."
4. Click **Close** on the message.



Now you can perform scan jobs without authenticating on the iManage server.

## Configure iManageCommonSettings.config

The iManageCommonSettings.config file under %programdata%\Kofax\Copitrak\Config\ provides a common place for iManage specific settings. To use Token Vault with iManage, edit the following values from the iManageCommonSettings.config file.

- Change the following value to "True" to use Token Vault from IManHelper.dll and IManTools.exe.

```
<add key="UseTokenVault" value="false" />
```

- Copy the TokenVaultAuthProviderID from your Token Vault provider configuration web page to the following value.

```
<add key="TokenVaultAuthProviderID" value="" />
```

## Configure CommonSettings.config

The CommonSettings.config file under the %programdata%\Kofax\Copitrak\Config\ folder provides a common place to configure global settings for Token Vault and logging. To use Token Vault, you also need to enter the URL used to run Token Vault to the following key from the CommonSettings.config file.

```
<add key="TokenVaultUrl" value=https://myhost.acme.com:8381 />
```

## Chapter 5

# Kofax Copitrak iManage Print Connector

The iManage Print Connector can be installed as a Copitrak Desktop add-on so that it can retrieve client/matter code automatically for printed DMS documents. Therefore, iManage Print Connector should be installed only when needed on the Copitrak Desktop workstations, and not on the CSS server.

## Install the iManage Print Connector

Before installing the iManage 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 iManage Print Connector using either of the following methods:

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

**i** 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 iManPrintInstaller.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 iManage Print Connector**.

## Uninstall the iManage Print Connector

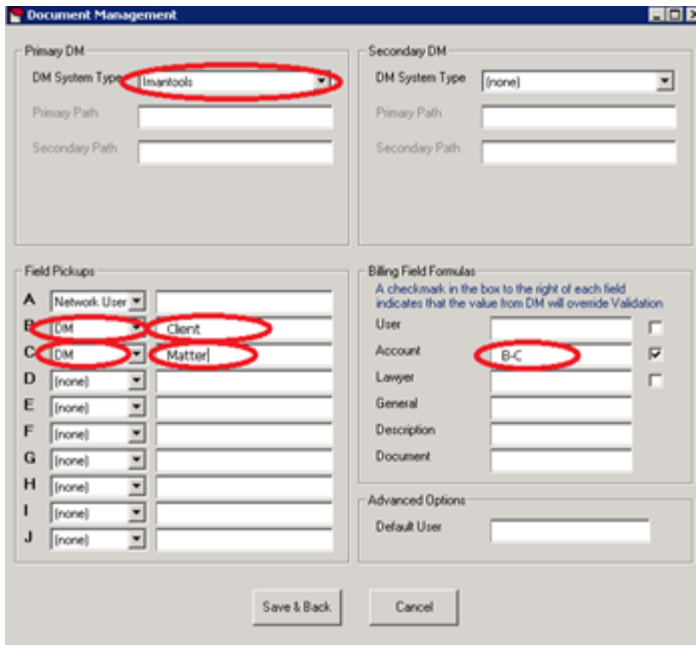
1. Find Kofax Copitrak iManage Print Connector on the list of installed programs in **Control Panel > Programs and Features**.
2. Right-click **Kofax iManage Print Connector**.
3. Click **Uninstall**.

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

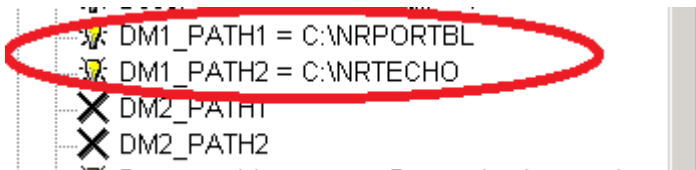
## Configure the iManage Print Connector

Before configuring the iManage Print Connector, make sure that the iManage Scan Connector is already installed on the CSS server.

1. Run the ConfigFileManager.exe file.
2. Open Configuration File Manager and select **DMS Intergration**.
3. Set **DM System Type** as **Imantools**. Set **Field Pickups** and **Account B-C** as per the sample screen below.



4. Select **Detailed View** in Configuration File Manager.
5. Set DM1 and DM2 Path as per the sample screen below.



**Example: LT2005\_Settings.ini section:**

[AUTOVALIDATION]

DocumentManagementSystem1=IMANTOOLS

DM1\_PATH1=C:\NRPORTBL

DM1\_PATH2=C:\NRTECHO

FormulaBType=D

FormulaBField=Client


FormulaCType=D

FormulaCField=Matter

AccountFormula=B-C

IMANAGE\_AllUsers=N

This setting is required only in special cases. "N" is the default setting for users.

 When you launch Copitrak Desktop, it automatically copies iManTools.exe.config from the same folder where your LT2005\_SETTINGS.INI is located and applies it whenever iManTools.exe is executed.

## Chapter 6

# Configure REST API

To use the REST API instead of the COM API, `rest_client_id` and `rest_client_secret` are required in both `imanhelper` and `imantools` configurations.

If the iManage server uses self-signed certificates, the `ignore_ssl` key must be set to "true" to verify the https calls. Otherwise, the connection to the server is not established.

To set `rest_client_id`, `rest_client_secret` and `password` keys in configuration files, run `iManTools.exe` on the CSS server:

```
imatools -pwd PASSWORD -client_id YOUR_REST_CLIENT_ID -client_secret  
YOUR_REST_CLIENT_SECRET.
```

Once executed, values will be printed on the console. Copy these values to the `iManageCommonSettings.config` file from the `%programdata%\Kofax\Copitrak\Config\` folder.

After that, copy `iManageCommonSettings.config` to `C:\ers\CopitrakDesktop` next to `LT2005_SETTINGS.INI` consumed by Copitrak Desktop. Rename this file to `iManTools.exe.config`.

**i** Do not edit `iManTools.exe.config` on the workstation where Copitrak Desktop is installed. Copitrak Desktop will pull this file from CSS server whenever it starts.

## Chapter 7

# Scanning modes

iManage Scan Connector has the following modes:

- Workspace mode
- My matters mode
- Flatspace mode

The scan workflow proceeds as follows: pick client-matter, pick database, workspace, folder (and subfolder if applicable), document type (and subtype if applicable), author, (any other custom fields), then file description. The steps of picking workspace and folders vary across the configuration modes. See relevant sections for details on each mode.

At each stage, results can be filtered by typing into the text box on the right. Results are displayed 8 at a time, and you can switch between pages of results using the left and right arrows at the top of the list. The arrows are shown as white when you can move forward/ backward.

## Workspace mode

Workspace mode has the workspace selector values of !2 or !2-00.

In Workspace mode, workspaces matching the supplied client-matter account are displayed. Choosing different client-matter accounts results in different workspaces being displayed. Workspaces can be filtered by name.

There are different configurations for displaying folders:

- Top-level directories mode (folder and subfolder selectors = !3-1, !3-3): folders are selected similarly to browsing through a file system. Top-level directories are shown, and if a folder is selected that has subfolders, then that folder is expanded to show its subfolders. Folder results can also be filtered by name at any step in the process.

**i** Make sure that iManageCommonSettings.config WorkFolder value is pointing to the general field of !3-3 (Usually General 6).

- All directories mode (folder and subfolder selectors = !3, X ): there is no browsing through folders to get to subfolders - every folder is displayed initially. Top-level folders are displayed as their name, and all subfolders are displayed as <parent name>\<child name>. Selecting a folder that has subfolders does not expand it to show subfolders, but selecting any folder is the final decision for where to scan the document.

**i** Make sure that iManageCommonSettings.config WorkFolder value is pointing to the general field of !3 (Usually General 5).

## My Matters mode

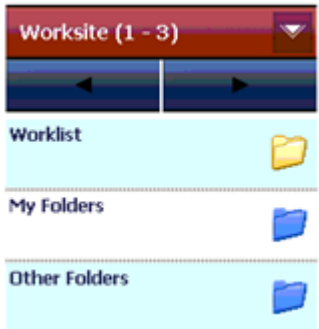
My Matters mode has the workspace selector of !2-1.

In My Matters mode, workspaces that a user has added to My Matters through iManage are displayed. The workspaces can be directly in My Matters, or can be inside categories (which can themselves be directly in My Matters, or inside other categories). Categories and workspaces cannot have documents saved to them, but workspaces contain folders, where you can save documents. A user's My Matters container is held on one database, so database selection does not matter for this mode. In fact, My Matters just stores shortcuts to workspaces, and these shortcuts can link to different databases.

For folder display, My Matters mode has two submodes: top-level directories mode and All directories mode. See [Workspace mode](#) for a description of the two modes.

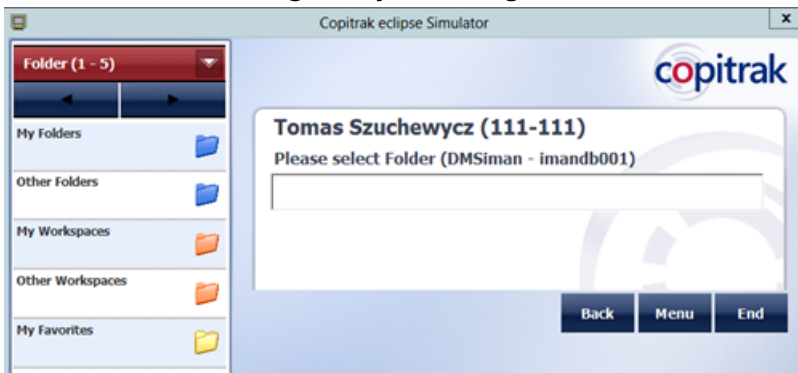
## Flatspace mode

Flatspace mode has the workspace selector of !2-2. You can see the selector values for the general fields in the Scantrak configuration below.

General Field	Picklist Source	Description
General3	!1	Database Selection.
General4	!2-2	Flatspace. This prompt is auto skipped since the result list always contains one item.
General5	!3-1	Folder Selection. In Flatspace mode, this list always contains three items. 

General Field	Picklist Source	Description
General6	!3-3	Folder Selection. This prompt displays all available folders from the previous selected location.  <div style="border: 1px solid #add8e6; padding: 5px; background-color: #e6f2ff;"> <p><b>i</b> If the Worklist is selected, it indicates that a document is being scanned and sent to the Document Worklist in the iManage server, and this prompt is automatically skipped.</p> </div>
General7	!4-00	Document Class. This prompt displays a picklist of all the available classes that can be used on the Document profile.

When Scantrak is configured, you can log in and see the different selections as shown below:



**My Folders** shows a list of folders whose owner is the currently logged-in user.

**Other Folders** shows a list of folders whose owner is not the currently logged-in user.

**My Workspaces** shows a list of workspaces whose owner is the currently logged-in user.

**Other Workspaces** shows a list of workspaces whose owner is not the currently logged-in user.

**My Favorites** contains categories, workspace shortcuts, and folder shortcuts that have been added to the currently logged-in user's "My Favorites" in iManage. **My Favorites** just holds shortcuts, so you cannot scan directly to it. However, you can scan to folders that have been added to **My Favorites**.

**i** Flatspace mode initially shows a hard-coded list of containers, which cannot be filtered.

## Top-level directories mode

Top-level directories mode has the folder and subfolder selectors of !3-1 and !3-3.



**i** Make sure that iManageCommonSettings.config WorkFolder value is pointing to the general field of !3-3 (Usually General 6).

## My Folders and Other Folders

My/OtherFolders mode shows the folders owned by the user (would be not owned by the user for Other Folders). Results are displayed as <workspace>\<folder> in order to disambiguate between top-level folders with the same name in different workspaces (and since iManage workspace and folder creation can be done using templates, this is a likely scenario). Browsing through folders is the same as in other modes - clicking a folder with a subfolder expands it to display all subfolders.

## My Workspaces and Other Workspaces

This workflow is the same as the Workspace mode. However, instead of showing workspaces matching client-matter, workspaces matching/not matching the current user are shown. Selecting workspaces expands them to show their folders, and selecting folders with subfolders expands them to show subfolders.

## All Directories mode

All Directories mode has folder and subfolder selectors of !3-1 and !3-2.

**i** Make sure that imantool.exe.config WorkFolder value is pointing to the general field of !3-2 (Usually General 6).

## My Folders and Other Folders

All folders and their subfolders are displayed whether or not the owner is the logged-in user. Top-level folders are shown as <workspace>\<folder>, and subfolders are shown as <parent>\<child>. Selecting a folder is final. There is no file system-like browsing in this mode.

## My Workspaces and Other Workspaces

For every workspace whose owner is/is not the logged-in user, all folders and subfolders are displayed. Top-level folders are shown as <workspace>\<folder>, and subfolders are shown as <parent>\<child>. Selecting a folder is final. There is no file system-like browsing in this mode.