Tungsten ControlSuite

Cost Recovery Connector Getting Started Guide

Version: 1.0.2

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Chapter 1

Preface

This guide provides instructions for administrators who are responsible for installing and configuring the Tungsten ControlSuite Cost Recovery Connector version 1.0.2.

System requirements

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

System requirements for ControlSuite Equitrac are available on the Tungsten ControlSuite Product Documentation site.

Related documentation

Product documentation for Tungsten Copitrak 3.5.0 is available here:

https://docshield.tungstenautomation.com/Portal/Products/Copitrak/3.5.0-9iemtxkeno/Copitrak.htm

Getting help with Tungsten Automation products

The Tungsten Automation Knowledge Portal repository contains articles that are updated on a regular basis to keep you informed about Tungsten Automation products. We encourage you to use the Knowledge Portal to obtain answers to your product questions.

To access the Tungsten Automation Knowledge Portal, go to https://knowledge.tungstenautomation.com/.

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

The Tungsten Automation 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 Tungsten Automation Community (for all customers).

  On the Resources menu, click the **Community** link.
- Access the Tungsten Automation Customer Portal (for eligible customers).

  Go to the Support Portal Information page and click **Log in to the Customer Portal**.
- Access the Tungsten Automation Partner Portal (for eligible partners).

  Go to the Support Portal Information page and click **Log in to the Partner Portal**.
- Access Tungsten Automation support commitments, lifecycle policies, electronic fulfillment details, and self-service tools.

  Go to the Support Details page and select the appropriate article.

Chapter 2

Overview

Tungsten ControlSuite Cost Recovery Connector is a set of applications for:

- Importing validation data for users and billing codes to Tungsten ControlSuite Equitrac.
- Exporting transactions from Tungsten ControlSuite Equitrac.

With this connector, you can use Tungsten Copitrak for cost recovery while also working with Tungsten ControlSuite embedded clients. Tungsten ControlSuite Cost Recovery Connector can be used to:

- Synchronize client matter numbers and billing codes.
- Export copy, print and scan transactions from ControlSuite.

Components

Tungsten ControlSuite Cost Recovery Connector consists of the following primary components, which appear in their respective folders after successful installation.

- Cost Recovery Configuration (Configuration UI)
  Web application to customize configuration files for the data transfer
  C:\Program Files\Kofax\Shared Services\DataTransfer\Configuration
- Command line tool
  Application to run the command line that executes the data transfer
  C:\Program Files\Kofax\Shared Services\DataTransfer

The Cost Recovery Connector uses the following configuration files:

- Default configuration files
  Read-only configuration templates that you can view in the Configuration UI
  Example: CopitrakAccountToEquitrac.json
  C:\ProgramData\Kofax\ControlSuite\DataTransfer\Default
- AccessControlDataTransferAdmin.json
  Configuration file to specify which users have access to the Configuration UI
  C:\ProgramData\Kofax\ControlSuite\DataTransfer
- CommonSettings.config
  Logging configuration file
  C:\ProgramData\Kofax\ControlSuite\Config

Prerequisites

This section lists the requirements needed before installing Tungsten ControlSuite Cost Recovery Connector.

Tungsten ControlSuite Cost Recovery Connector must be installed on the same system where the following ControlSuite component is already installed and configured:

- Equitrac Core Accounting Service (EQ CAS)

For more details on installing and configuring the ControlSuite components, see Configure ControlSuite components or refer to the ControlSuite Product Documentation page.

Further requirements:

- Tungsten Copitrak System Software (CSS) 3.4.0

> If Copitrak CSS and ControlSuite are to be installed on the same computer, you must install ControlSuite first. If Copitrak is installed on a separate system, you must configure the Cost Recovery Connector as described in Configure the connector if Copitrak is on a separate system.

- ASP.NET Core 6.0 Runtime
- ASP.NET Core Hosting Bundle
- IIS 8.0 or higher
- Microsoft .NET Framework 4.8 or higher
- Google Chrome or Microsoft Edge

Configure ControlSuite components

When configuring the ControlSuite components in the Configuration Assistant, ensure the following:

- In the Databases page, the EQ CAS database is configured properly.
- The Security Framework Status page shows a green configured status.
- In CS Enrollment, all the ControlSuite clients are enrolled in the Security Framework.
- In Services, the Core Accounting Service is in "Running" status.
- The ControlSuite system is licensed.

Chapter 3

Install ControlSuite Cost Recovery Connector

This section provides instructions to install Tungsten ControlSuite Cost Recovery Connector.

The installer file is named DataTransfer.msi and is available in the following folder in CSS 3.5.0:

```
C:\ERS\Install\REDIST\ControlSuiteCostRecoveryConnector
```

> If Copitrak and ControlSuite are not installed on the same computer, you must copy DataTransfer.msi to the computer on which ControlSuite is installed.

You can install the Cost Recovery Connector using either of two modes:

- UI mode

  DataTransfer.msi opens a standard Windows installer called Tungsten ControlSuite Cost Recovery Connector Setup, which gives you instructions and shows your progress as you proceed with the installation.
- Silent mode

  Run the following command from an administrator command prompt:

  ```
  msiexec -i DataTransfer.msi /qn /L*V “c:\temp\MyDataTransferLog.log
  ```

After successful installation:

- A shortcut is created for Cost Recovery Configuration under Start > Kofax .
- In IIS, a web application called DataTransferConfiguration appears under the NDI website.
- The files listed in Components are deployed in their respective folders.

Control access to ControlSuite Cost Recovery Connector

To specify which users and user groups have access to the Cost Recovery Connector, use the AccessControlDataTransferAdmin.json file, which is available here:

```
C:\ProgramData\Kofax\ControlSuite\DataTransfer
```

> User names and group names must be provided in lowercase.

Example:

```
{
 "Users": [
```

```
  "acme\\jane.doe"
 ],
 "Groups": [
  "*\\domain users"
 ]
}
```

We recommend that you provide the user names individually rather than specifying a group, because the first option is a faster and more direct way of validating users, and the potential for errors is also minimized.

Uninstall ControlSuite Cost Recovery Connector

To uninstall Tungsten ControlSuite Cost Recovery Connector, remove Cost Recovery Configuration from the list of installed programs in **Control Panel** > **Programs and Features**.

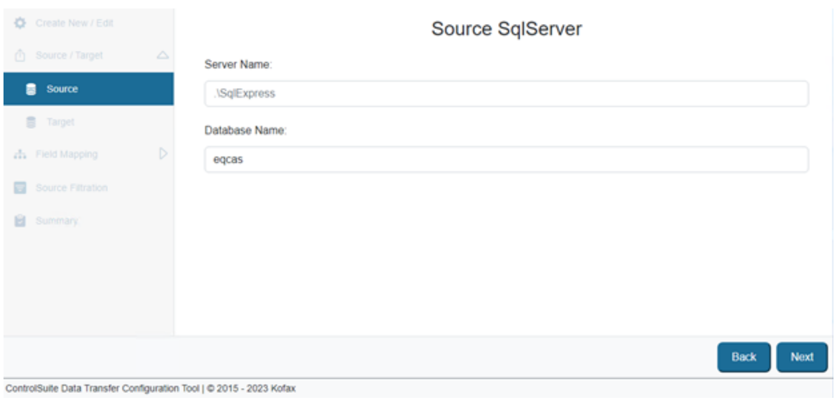
Chapter 4

Configure the connector if Copitrak is on a separate system

When Copitrak and Equitrac reside on separate systems, you must transfer the Copitrak database credentials if integrated authentication is not used to access the database. In this situation, you must transfer the following registry key and its values:

```
HKEY_LOCAL_MACHINE\SOFTWARE\WOW6432Node\PROMATEK\ERS
```

In the Cost Recovery Configuration web application, database settings such as your SQL server name/address and instance name are available on the Source / Target tab as indicated in the image below.



Chapter 5

Data transfer with ControlSuite Cost Recovery Connector

Data transfer with the Cost Recovery Connector consists of the following steps, described in more detail in the sections that follow.

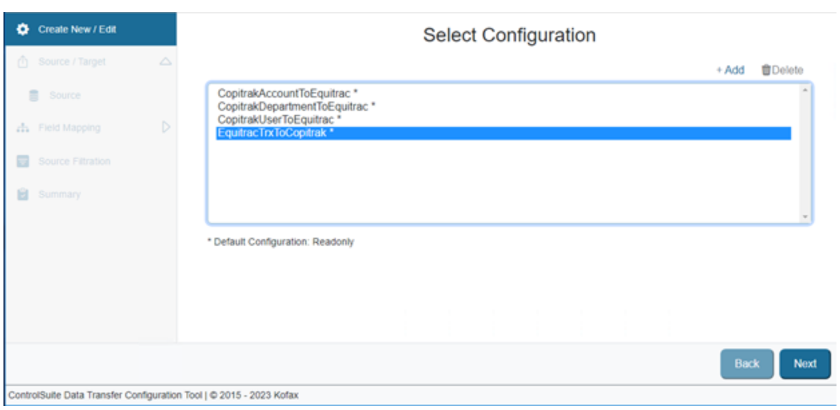
1. Configure the parameters of the data transfer in the Cost Recovery Configuration web application.
2. Execute the data transfer from a command line or schedule it with Windows scheduler or Equitrac scheduler.

Configure the data transfer parameters

Configuration is done in a web application called Cost Recovery Configuration, which has a layout similar to some ControlSuite applications, with a pane on the left with different options to customize the data transfer.

When customization is completed, the new configuration file appears in C:\ProgramData\Kofax\ControlSuite\DataTransfer\Custom.

Default configuration files (read-only templates) are marked with an asterisk (*) in the web application. Templates such as CopitrakUserToEquitrac and CopitrakAccountToEquitrac are ready to use without any customization. These files are available here: C:\ProgramData\Kofax\ControlSuite\DataTransfer\Default



To customize the configuration files with Cost Recovery Configuration:

1. Go to **Start** > **Kofax** and launch the **Cost Recovery Configuration** application.

The **ControlSuite Data Transfer Configuration** page opens in a web browser.

> Tungsten ControlSuite Cost Recovery Connector is optimized for use with Google Chrome and Microsoft Edge. Mozilla Firefox is not supported.

2. On the **Create New / Edit** page, select the configuration to customize.
3. To create a new configuration, click **Add**.
   a. Type the name of the new configuration and select an existing configuration to use as a template.
   b. Click **OK**.
      This creates an editable copy of the selected template, which you can customize in the following steps.
   c. Click **Next**.
4. The **Source / Target** page gives you a summary of the source and target parameters of the data transfer. Click **Source** to view the SQL server name/address and instance name, and change them if necessary.
5. Add new parameters or customize the existing ones (if necessary) using one or more of the methods listed below.

Type	Description
Field Mapping	Lists the fields in the source database with the fields they are mapped to in the target database. Also indicates if any type of transformation was made to map these fields. For example, "None" means that the source field value is not transformed before being stored in the destination field.
Literal	Used to assign hard-coded values to the target field.
Value Map	Used to define a specific target value for each source value individually. This type of transformation is recommended for defining the transaction type or mapping a small number of unit IDs.
Regex	Used to obtain a target value from a source value that matches a regular expression.
PowerShell	Used to specify a script to generate a target value from the source value.
Coalesce	Used to generate a target value by combining one or more source values in a specified order. As an alternative to the PowerShell solution, this method picks the first source field that is not null and stores it in a field of the destination. If all source values are null, the specified default value is stored instead.

6. On the **Source Filtration** page, you can configure filter parameters that limit what data is transferred. As an example, when configuring data transfers from Equitrac to Copitrak, you can configure the "trxsubtype" filter parameter to transfer data for print transactions while excluding scan transactions.

   Some Source Filtration parameters are mandatory and cannot be removed. For example, when configuring data transfers from Equitrac to Copitrak, there are two mandatory parameters to determine the end of the data transfer:

   - trxminage_seconds – Data transfer ends when the program finds transactions younger than trxminage_seconds (such as 60 seconds).

- consider_escrow – Data transfer ends when the program finds transactions that are not yet completed ("escrow" transactions).

7. To finish the customization, click **Finish**.

Execute the data transfer

After configuring the parameters for the data transfer, run the command as in the example below.

```
C:\Program Files\Kofax\Shared Services\DataTransfer\DataTransfer.exe Custom
\Config\{ConfigurationName} TargetServer={ServerName}
```

Where:

- `{ConfigurationName}` – the name of the configuration customized in Cost Recovery Configuration.
- `TargetServer` – only required when the target server is not on the same system where the Cost Recovery Connector is installed.

DataTransfer.exe can be scheduled to execute the transfer at regular intervals. You can use Windows Task Scheduler or ControlSuite Equitrac Scheduler to set the frequency that works best for your organization.

When data transfer is executed, the following outputs are created:

- A log file is created in the C:\ProgramData\Kofax\ControlSuite\Logs\DataTransfer\{ConfigurationName} folder.

  The name of the log file indicates the date and time of the transfer.

  > Logging configuration is available here: C:\ProgramData\Kofax\ControlSuite\Config\CommonSettings.config

- The result of the execution (success/failed/error) is logged as an information or an error in the Event Log under the source CS DataTransfer.

Execute a new transfer after editing data

It is possible to edit user names and user IDs in Copitrak but not in ControlSuite. If you edit a value in Copitrak and then execute a new transfer to export it, both the old and the new values are displayed in the ControlSuite database.

There are two workarounds to this situation:

- In Copitrak, delete the original user name, and create a new one. Then execute the transfer. This exports the new user and deletes the old user from ControlSuite.
- After the second transfer, which results in the new user appearing next to the old one, manually delete the old user from ControlSuite.