Kofax eFlow ePortal
Installation Guide

Version: 2.1.0

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KOFAX

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Preface

This guide provides the installation instructions for the Kofax eFlow ePortal application. The Kofax eFlow ePortal application is an add-on application to the Kofax eFlow platform.

Product documentation

The full documentation set for Kofax eFlow ePortal is available on the Product documentation page.

The documentation set includes the following items:

Name	Description
Kofax eFlow ePortal Installation Guide	Provides instructions for installing the Kofax eFlow ePortal application.
Kofax eFlow ePortal User's Guide	Provides information on the application configuration, connectors, filtering, conversion, collection creation, and acknowledgment.
Kofax eFlow ePortal Release Notes	Details the list of newly added features, resolved issues, known issues with an applicable workaround, and the changes made since the previous release.
Kofax eFlow ePortal Technical Specifications	Describes the prerequisites and the required hardware and software to work with the ePortal application.

Offline documentation

To access the documentation offline, download the KofaxeFlowePortalDocumentation_2.1.0_EN.zip file from the Kofax Fulfillment Site and extract it on a local drive available to your users.

Training

Kofax offers both classroom and online training to help you make the most of your product. To learn more about training courses and schedules, visit the Kofax Education Portal on the Kofax website.

Getting help with Kofax products

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

To access the Kofax Knowledge Base:

1. Go to the Kofax website home page and select **Support**.

2. When the Support page appears, select **Customer Support** > **Knowledge Base**.

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

The Kofax Knowledge Base 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.

  Scroll through the Kofax Knowledge Base home page to locate a product family. Then click a product family name to view a list of related articles. Please note that some product families require a valid Kofax Portal login to view related articles.

From the Knowledge Base home page, you can:

- Access the Kofax Community (for all customers).

  Click the **Community** link at the top of the page.

- Access the Kofax Customer Portal (for eligible customers).

  Click the **Support** link at the top of the page. When the Customer & Partner Portals Overview appears, click **Log in to the Customer Portal**.

- Access the Kofax Partner Portal (for eligible partners).

  Click the **Support** link at the top of the page. When the Customer & Partner Portals Overview appears, click **Log in to the Partner Portal**.

- Access Kofax support commitments, lifecycle policies, electronic fulfillment details, and self-service tools.

  Go to the **General Support** section, click **Support Details**, and then select the appropriate tab.

Installation

This topic provides installation instructions for Kofax eFlow ePortal 2.1.0.

ePortal needs one eInvoicePortalPDF license per ePortal instance. Refer to the Manage licenses section, in the *Kofax eFlow Administrate User Guide* for information on installing licenses.
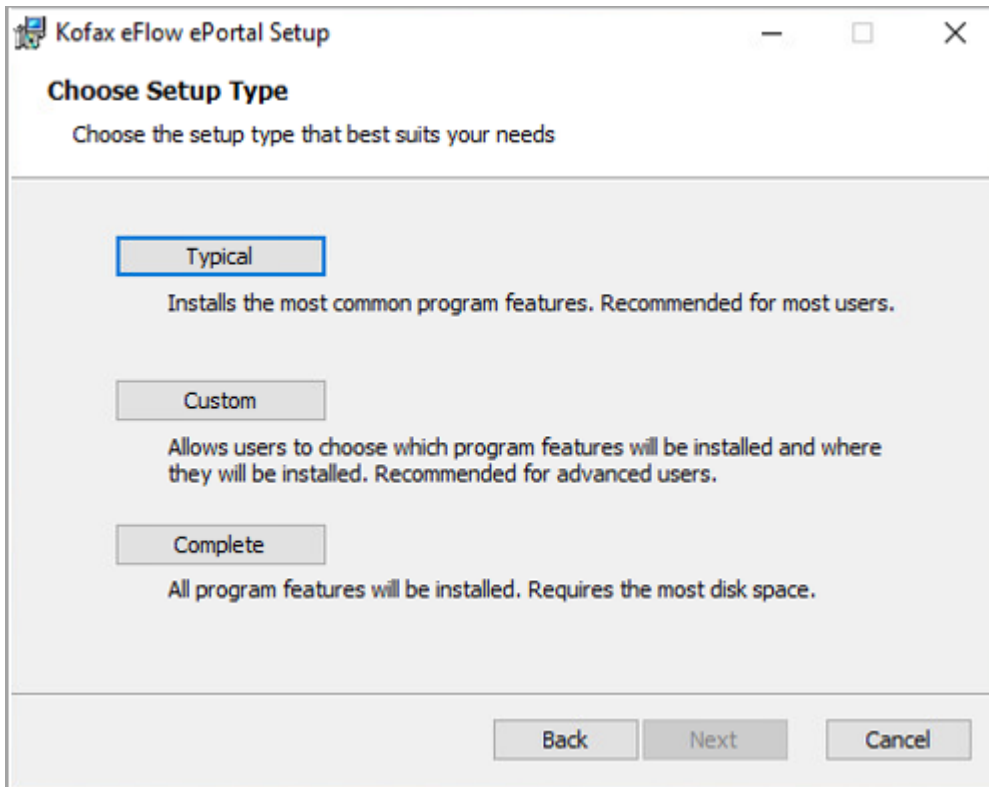
For information on system requirements for Kofax eFlow ePortal 2.1.0, refer to the Kofax eFlow ePortal Technical Specifications.

Installation procedure

1. Download the Kofax_eFlow_ePortal-2.1.0.ZIP on your computer from the Kofax Fulfillment Site.
2. Extract Kofax_eFlow_ePortal-2.1.0.ZIP and run the ePortal21.msi file.
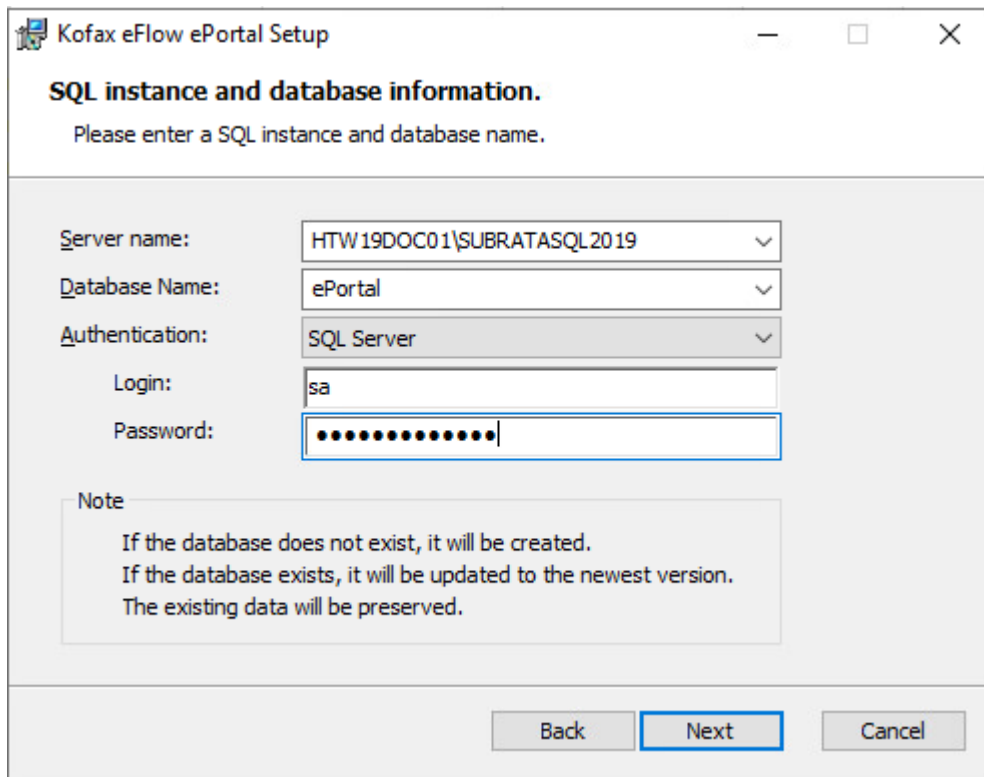   The **Kofax eFlow ePortal Setup** wizard appears.

3. Click **Next**.

4. Read the end-user license agreement, select the check box to accept it, and then click **Next**.

5. Select the setup type and click **Next**.

ⓘ We recommend that you select the **Complete** option, as this will install all the ePortal features. Select the **Custom** option if you want to install specific ePortal features or change the default installation path.
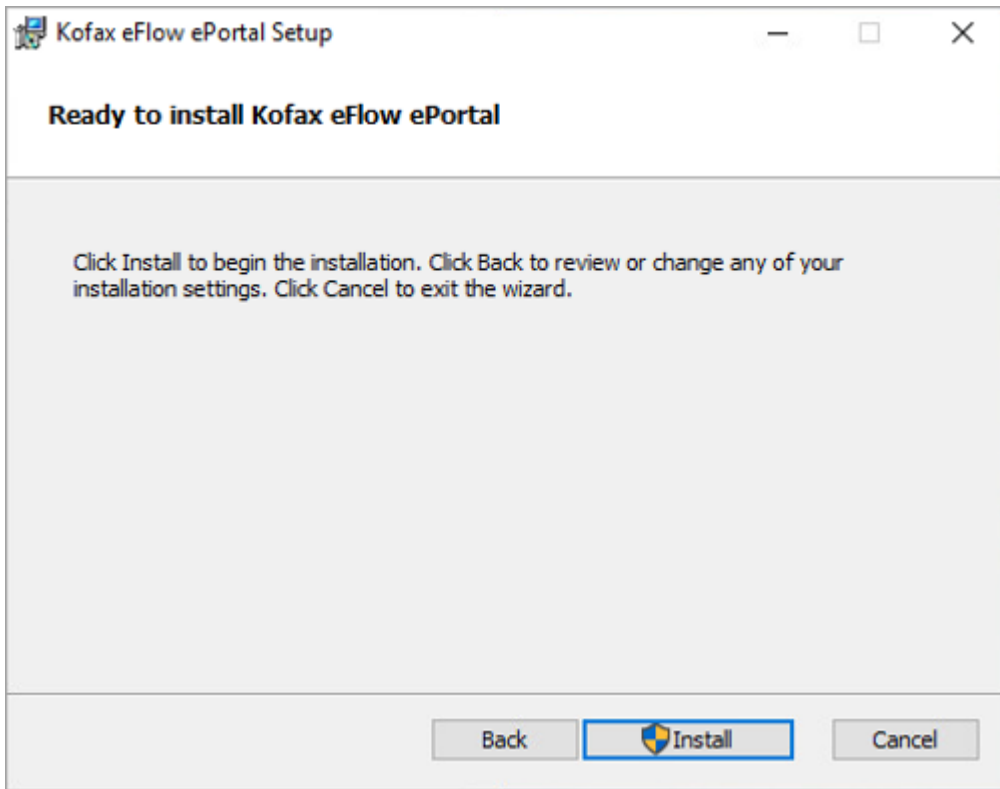
6. Enter the server name and database name, and select the authentication mode. If you select authentication mode as **SQL Server**, enter the login ID and password.

7. Click **Next**.
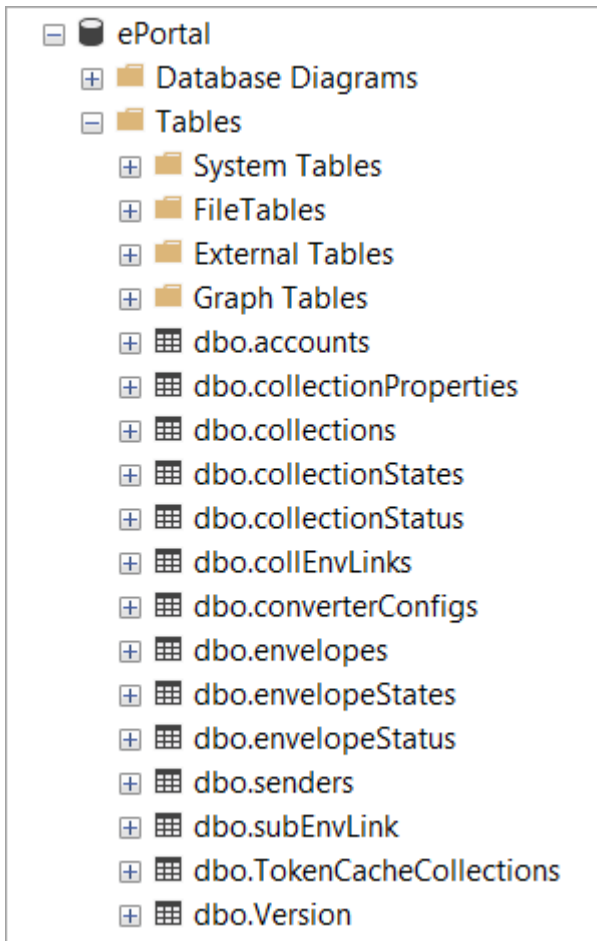   The **Ready to install Kofax eFlow ePortal** screen appears.

8. Click **Install**.

   If the default installation path is not changed, a new folder Kofax eFlow ePortal is created in the `C:\Program Files (x86)\TIS\Kofax eFlow ePortal` folder. This folder contains all the files required to complete the installation, including custom code samples, a testing CAB, and scripts to create the ePortal SQL database. The remaining files (executables and all relevant DLLs) are copied to the Bin folder.

   After a successful installation of ePortal, the following ePortal database is created.

9. After completion of installation, click **Finish** to exit the Setup wizard.

10. Use the eFlow Administrate tool to install the SimpleDemoEPortal.cab demo file, available at `C:\Program Files (x86)\TIS\Kofax eFlow ePortal\Cab`.

11. To add an ePortal station to an existing application, in the Design module, add an auto station and make sure that the following events are set:
    - **On Login Events**: TiS.Import.ePortal.ePortalStation:ePortalStation:OnLogin
    - **OnPreGetCollection**: TiS.Import.ePortal.ePortalStation:ePortalStation:OnPreGetCollections

    If required, refer to the *Kofax eFlow Design User Guide* for information on adding events.

12. If you have added an ePortal station to your application, copy the EPortal.AppConfig file from SimpleDemoEPortal.cab located in the `C:\Program Files (x86)\TIS\Kofax eFlow ePortal\Cab` folder and paste it into the `Setup` folder of your application.

    > ℹ To access EPortal.AppConfig, change the .cab file extension to .zip.

    The following is the path to the `Setup` folder:
    `C:\ProgramData\TIS\eFlow 6\AppData\Server\SimpleDemoEportal\Setup`

> ℹ By default, the name of the application is SimpleDemoEportal. You can use another name for the application.

13. Configure ePortal.AppConfig in the `Setup` folder:

    Use the following procedure to set up a Gmail account using POP3 connectivity.

    a. In ePortal.AppConfig, check that the connection string node, username, and password are correct.

    ```
    <ConnectionString Value="DATA SOURCE=<Your server name>\EFLOW;INITIAL
     CATALOG=ePortal">
        <UserName>sa</UserName>
        <Password>sa</Password>
    ```

    b. In the `<Stations><ActiveAccounts>` section, change the following parameter to the active account you would like to use.

    ```
    <ActiveAccount Id="pop3_oauth_outlook" Enabled="true" />
    ```

    c. In the `<Sections><MailAccounts>` section, add the mail account from the previous section. See the following code for an example.

    ```
    <MailAccount Id = "pop3_oauth_outlook" DisplayName="pop3_oauth_outlook"
     Host="outlook.office365.com" Port="995" SSL="true"
     IgnoreCertificateErrors="false" UserName="abc.xyz@kofax.com"
     Protocol="POP3_OAUTH" TenantID="bcd8ba5f-75e2-4d6c-8aa5-fff6c8baa1ff"
     ClientID="ce82dd43-79c0-4445-957e-54f4e2ce430b"> <MailEncoding>UTF-8</
    MailEncoding> <DefaultCharset>UTF-8</DefaultCharset> <Folders> <Folder>INBOX</
    Folder> </Folders><Filter /> <Impersonate Enabled = "false" /> </ MailAccount
     >
    ```

    Refer to the *Kofax eFlow ePortal User's Guide* for more information on configuration.

Now you should be able to send emails to the email account and process them with the eportal1 or eportal2 station.