

Configure Email and Watched Folder as Capture Input Sources

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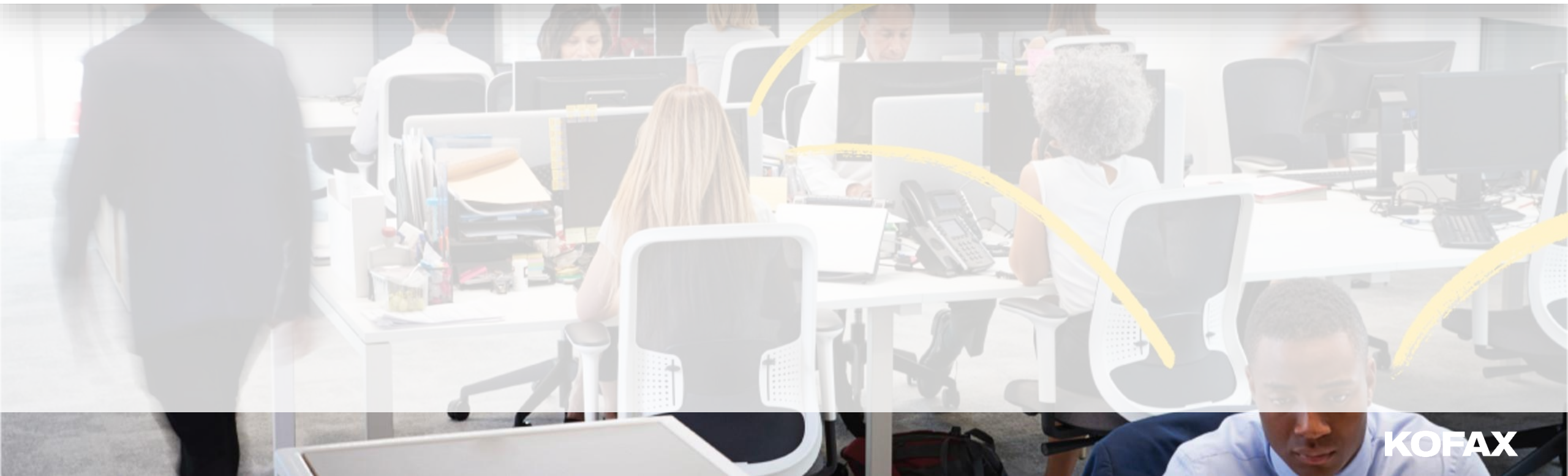
KOFAX

Overview of Multi Channel Capture (MCC)



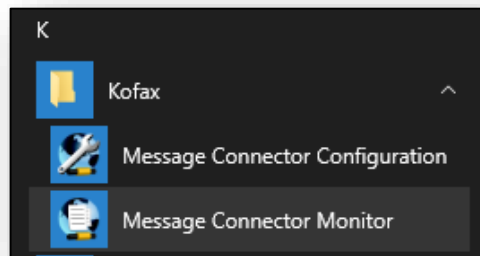
- Documents can be ingested through multiple mechanisms e.g.
 - Scan
 - Email
 - Watched Folders
 - Multi-Functional Peripheral (MFP)
 - Fax
 - Mobile

Kofax Import Connector (KIC)

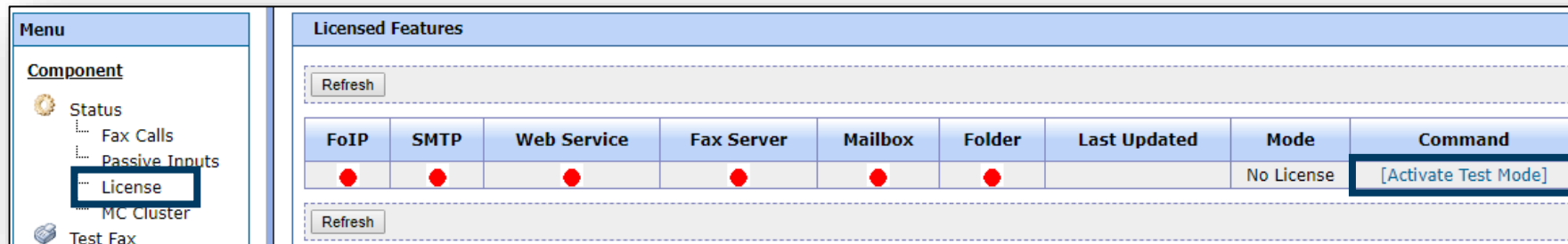


Kofax Import Connector

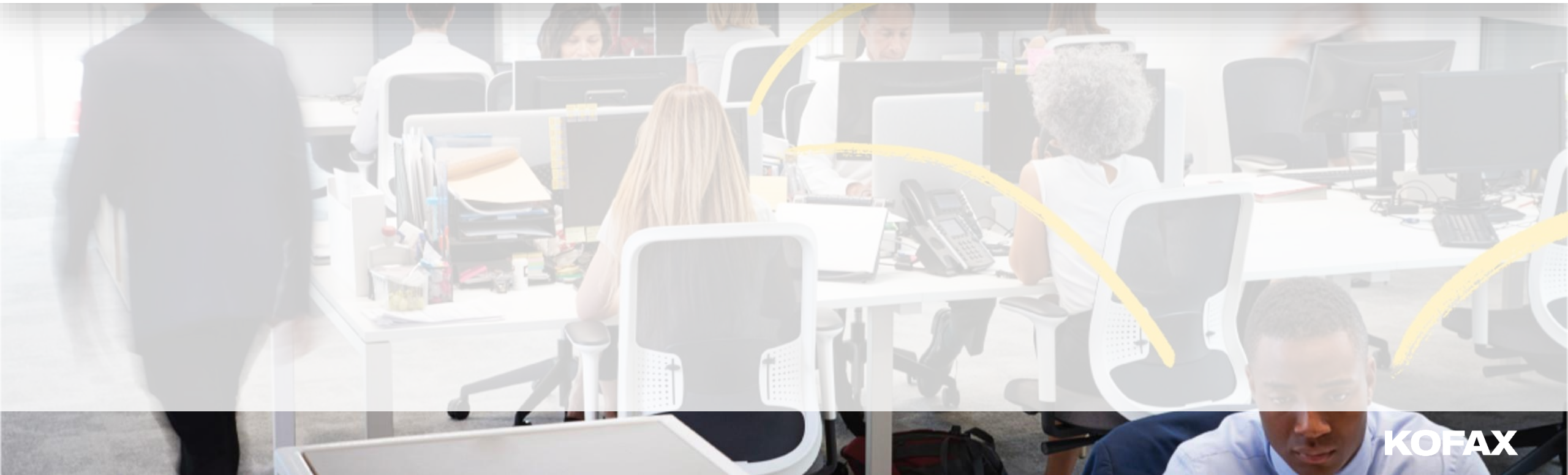
- Mailbox monitoring and watched folders use the **Kofax Import Connector (KIC)**
 - You can open the KIC website by going to **Start > Kofax > Message Connector Monitor**
 - You can also enter the KIC **URL** into a browser:
<http://localhost:25086>



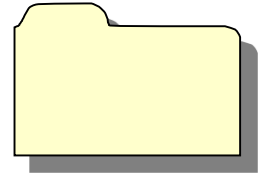
- If you are using an evaluation license you will need to navigate to the **License** menu and **Activate Test Mode**



Email and Watched Folders as Input Sources



Mailbox Monitoring and Watched Folders



- **Monitor a Mailbox or File Location**
- From the **Main** menu navigate to **Integration > Import settings** and click **New**
- Can automatically **Create a new job** when an email arrives
 - Folder of attachment(s) is automatically passed into the job
 - From, Subject, Body etc. can be mapped into the job
- Can automatically Create a new job when a document(s) is added to a watched folder
- Additionally the email body can be created as a document, this will become the first document in the folder in the new job

Folders, Email, FAX

- Use **Integration > Import settings** to define settings to integrate with external applications and services
- You can configure Kofax TotalAgility to receive documents through a variety of Active and Passive import sources
- Each external system has configuration settings that create Kofax TotalAgility processes when messages with attached business documents are received



Email import settings are only available for Kofax TotalAgility on-premise; Email import settings are not available in the Azure environment unless via the on-premise Integration Server

Active Import Sources

- Active import sources include:
 - Simple Mail Transfer Protocol (SMTP)
 - Fax Over Internet Protocol (FoIP)
- The active import sources run as services within Kofax TotalAgility that accept message sent from external systems.



Only one import source type can be configured for each import connection

Passive Import Sources



- Passive import connection settings include:
 - Post Office Protocol (POP3)
 - Internet Message Access Protocol (IMAP)
 - Exchange Web Services (EWS)
 - Fax
 - File
- Passive import connections are polled by Kofax TotalAgility to retrieve messages

Configure Import Source Settings For POP3

Update import connection

* indicates a required field

Name*

Description

Active ☒

Message connector URL*

Process password

Administrator password

Enable SMTP server ☐

Enable FOIP server ☐

Import sources

+ ✎ 🗑

Name	Type	Active	Target pr
TotalAgility Mailbox	POP3	✓	Capture A
Watched Folder	FILE	✓	Capture A

Update import source

* indicates a required field

Type

Display name*

Active ☒

Import content

Poll cycle in seconds

Host*

SSL

Port

Username

Password

[Test mailbox](#)




Configure Import Source Settings For POP3

Associated action(s)

Job type Create new job ▼

Process Capture Applications (Process) × ▼

Initialization variables

Name	Type	Mapping	XML expression
Applications Folder	Folder		
Applications Folder.Scan Det...	String	Import Source Type × ▼ 	
Applications Folder.Scan Det...	Date	Message Reception Time Created × ▼ 	
Applications Folder.Scan Det...	String	From × ▼ 	

Configure Import Source Settings For File (Watched Folder)

Update import connection

* indicates a required field

Name*

Description

Active ☒

Message connector URL*

Process password

Administrator password

Enable SMTP server ☐

Enable FOIP server ☐

Import sources

+ ✎ 🗑

Name	Type	Active	Target process
TotalAgility Mailbox	POP3	✓	Capture Applications
Watched Folder	FILE	✓	Capture Applications

Update import source

* indicates a required field

Type

Display name*

Active ☒

Normalize images and create pages ☒

Create document from body ☐

Import content

Body with message header

Poll cycle in seconds

File detection mode ☒ File not modified since ☐ Use trigger




Configure Import Source Settings For File (Watched Folder)

Associated action(s)

Job type Create new job ▼

Process Capture Applications (Process) × ▼

Initialization variables

Name	Type	Mapping	XML expression
Applications Folder	Folder		
Applications Folder.Scan Det...	String	Input Source Type × ▼ 	
Applications Folder.Scan Det...	Date	Message Reception Time Created × ▼ 	
Applications Folder.Scan Det...	String	File Path × ▼ 	

Configure Import Source Settings For FAX

New import source *

* indicates a required field

Type: External fax server

Display name*: RF1

Active: ☒

Normalize images and create pages: ☒

Fax server type: RightFax

Poll cycle in seconds: 5

Host: localhost

Username: Trainee

Password:

Associated action(s)

Job type: Create new job

Process: Capture Applications (Process) x

Initialization variables

Name	Type	Mapping	XML expression
Applications Folder	Folder		
Applications Folder.Scan Det...	String	Fax User x	
Applications Folder.Scan Det...	Date	Message Reception Time Created x	
Applications Folder.Scan Det...	String	From Fax Number x	

Other Import Settings

- Include message as EML or MSG
- Document Normalization & VRS Processing
- Archive Folder & Notification Settings
- XML Processing

Include complete message as EML File	<input type="checkbox"/>
Include complete message as MSG File	<input type="checkbox"/>
Skip import for extensions (eg: .txt;.docx;...)	<input type="text"/>
Skip import for files of size(bytes) less than	0 <input type="button" value="v"/> <input type="button" value="^"/>
Extract PDF portfolio content	<input type="checkbox"/>
Document normalization	
Normalize non-PDF eDocuments to PDF/A	<input type="checkbox"/>
Normalize incoming PDF documents to PDF/A	<input type="checkbox"/>
Flatten XFA forms to PDF/A documents using Adobe Experience Manager	<input type="checkbox"/>
Import exception page for failed preparation	<input type="checkbox"/>
VRS processing	
Scan / VRS profile	<input type="text"/>
Extract text from PDF	All text <input type="button" value="v"/>
Word separation characters	/:()-# <input type="text"/>
Apply scan/VRS profile to eDocuments	<input type="checkbox"/>

Document archiving	
Archive folder	<input type="text"/>
	Test archive folder
Notification settings	
Reject notification recipient list (delimited by ';')	<input type="text"/>
Send email to originator	<input type="checkbox"/>
Include complete email message as attachment	<input type="checkbox"/>
Message from	no-reply@kta.import <input type="text"/>
	Send a test notification email
XML processing	
Kofax XML import mode	Do not map XML fields to TotalAgility fields <input type="button" value="v"/>
Kofax XML page tag processing level	Page <input type="button" value="v"/>

eDocuments

- MS Office Documents

Document normalization
Normalize non-PDF eDocuments to PDF/A ☐
Normalize incoming PDF documents to PDF/A ☐
Flatten XFA forms to PDF/A documents using Adobe Experience Manager ☐
Import exception page for failed preparation ☐