

TECHNICAL TRAINING LAB INSTRUCTIONS

In this lab you will learn how to configure other “Capture Services” or input methods to the Capture Applications process. We will look at how to configure import connectors including email and watched folders.

Lab 16-1

Import Connections (Email & Folder)

Configure a New Import Connection

You can configure Kofax TotalAgility to *receive* documents through POP3, IMAP, Fax, File, and Exchange Web Services. Each external system has configuration settings that can be configured to create Kofax TotalAgility processes when messages with attached documents are received. For this lab exercise, we will be setting up a connection to a POP3 mailbox.

1. From the **Main** menu navigate to **Integration > Import settings**, and click **New**.
2. Enter **Email and Watched Folder** for the import connection **Name**.
3. Note that the **Message connector URL** is automatically set to **http://localhost:25086/**

New import connection

** indicates a required field*

Name*

Description

Active ☒

Message connector URL*

Process password

Administrator password

Enable SMTP server ☐

Enable FOIP server ☐

Import sources

Import Source Settings for a POP3 Mailbox

4. Click the **+** icon next to the **Import sources** section. **POP3** is the default type.
5. Configure the settings as shown below:

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New import source *

* indicates a required field

Type	POP3
Display name*	TotalAgility Mailbox
Active	<input checked="" type="checkbox"/>
Normalize images and create pages	<input checked="" type="checkbox"/>
Create document from body	<input type="checkbox"/>
Import content	Body first and attachments
Body with message header	Exclude message header
Poll cycle in seconds	5
Host*	localhost
SSL	Never
Port	110
Username	TotalAgility@kofax.com
Password	*****

[Test mailbox](#)

Notes: (i) The Password=**W**orkstation! (Capital W and then a zero).

(ii) If **Normalize document and create pages** is unchecked, only the source document is imported, and the document would have to go through Document Conversion or Image Processing. In this class we will check the option so that pages are automatically created and the document can be classified.

6. Click **Test mailbox** to ensure a good connection.
7. Scroll to the bottom and configure the **Associated action(s)**:

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 ×	✎

Cancel Save

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Notes: (i) From the **Scan Operator** dropdown, select the **Metadata** field called **Import Source Type** (EMAIL).

(ii) From the **Scan Date** dropdown, select the **Metadata** field called **Message Reception Time Created** (the date and time when the message was retrieved).

(iii) From the **Location** dropdown, select the **Metadata** field called **From** (who sent the email).

8. Click **Save** (leave the Import Connection screen open for the next part).

Import Source Settings for Folder/File (Watched Folder)

Kofax TotalAgility can also monitor a folder on the filing system for incoming files. On the **C:** of your training PC, a folder called **WatchedFolder** has been created. This folder will be monitored for new documents via the Watched folder Import Connection Settings. You will add an additional import source to the same connection.

9. Click the **+** icon next to the **Import sources** section.

10. From the **Type** dropdown, select **FILE** and configure the settings as shown below:

** indicates a required field*

Type	FILE
Display name*	Watched Folder
Active	<input checked="" type="checkbox"/>
Normalize images and create pages	<input checked="" type="checkbox"/>
Create document from body	<input type="checkbox"/>
Import content	Body first and attachments
Body with message header	Exclude message header
Poll cycle in seconds	5
File detection mode	<input checked="" type="radio"/> File not modified since <input type="radio"/> Use trigger
File not modified since	60 Seconds
Delete folder tree after importing files	<input checked="" type="checkbox"/>
Watched folder	C:\WatchedFolder
Process subfolders	<input type="checkbox"/>
File mask (eg: '*.txt;*.docx;...')	*,*
Username	Trainee
Password	*****

[Test file import](#)

Notes: (i) Use the Password: **W0rkstation!** (Capital W followed by zero).

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(ii) The **WatchedFolder** already exists on your training environment. If you are completing on demand training ensure that you have completed Lab 1.

11. Click on the **Test file import** link, and ensure that a successful connection is established.

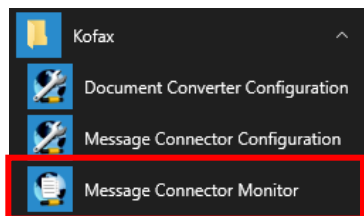
12. Scroll to the bottom and configure the Associated action(s) as follows:

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	File Path	

Note: **Import Source Type** will be the value **FOLDER**. **File Path** value will be **C:\WatchedFolder**.

13. Click **Save** to save the import source, and **Save** again to save the Import connection.

14. Let's make sure the **Kofax Import Connector Message Connector** is configured and ready to be used. Open it up by going to **Start > Kofax > Message Connector Monitor**.



15. Then click on the **License** link under the **Component > Status** panel.

FoIP	SMTP	Web Service	Fax Server	Mailbox	Folder	Last Updated	Mode	Command
●	●	●	●	●	●		No License	[Activate Test Mode]

Note: You may have to click **Activate Test Mode** in the **Command** column if you have installed TotalAgility on your own environment or are using an evaluation license.

16. Close the **Message Connector** window.

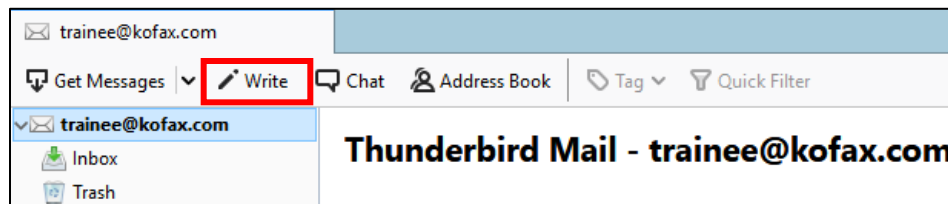
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Test Import Connection and Sources

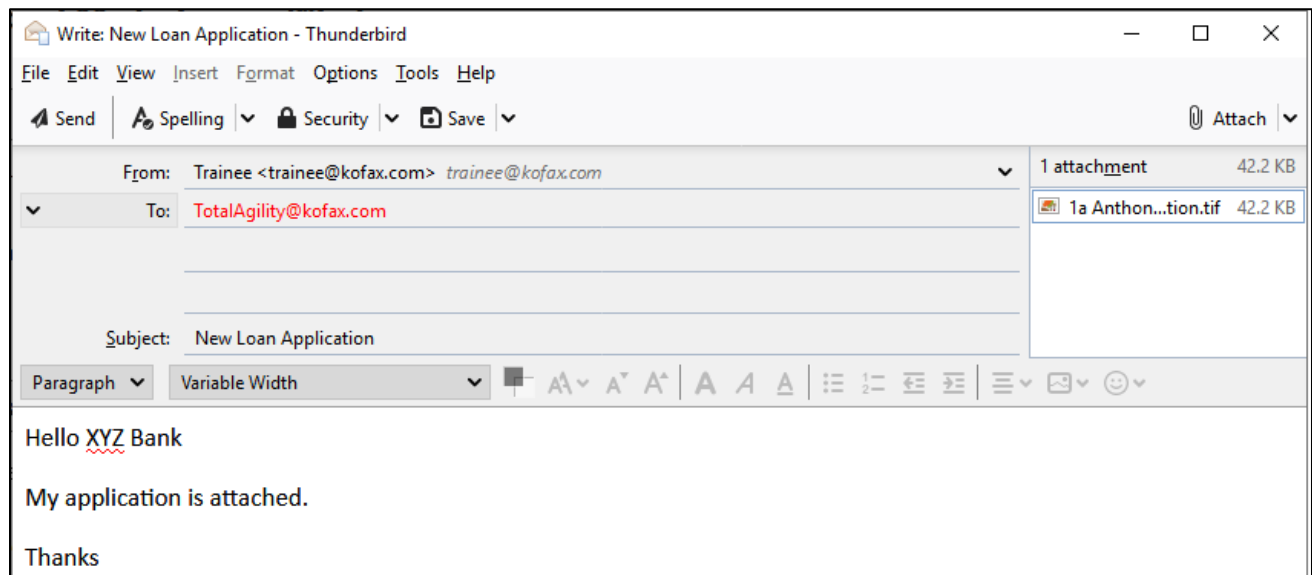
Test Import Connection for POP 3 Mailbox and Watched Folder

In this part, you will test the import connection and sources by sending an email to the POP 3 mailbox, and by copying and pasting a file into the watched folder.

1. Open up **Mozilla Thunderbird** (shortcut on Taskbar), and create a new email as shown here using the **trainee@Kofax.com** account (select this account).



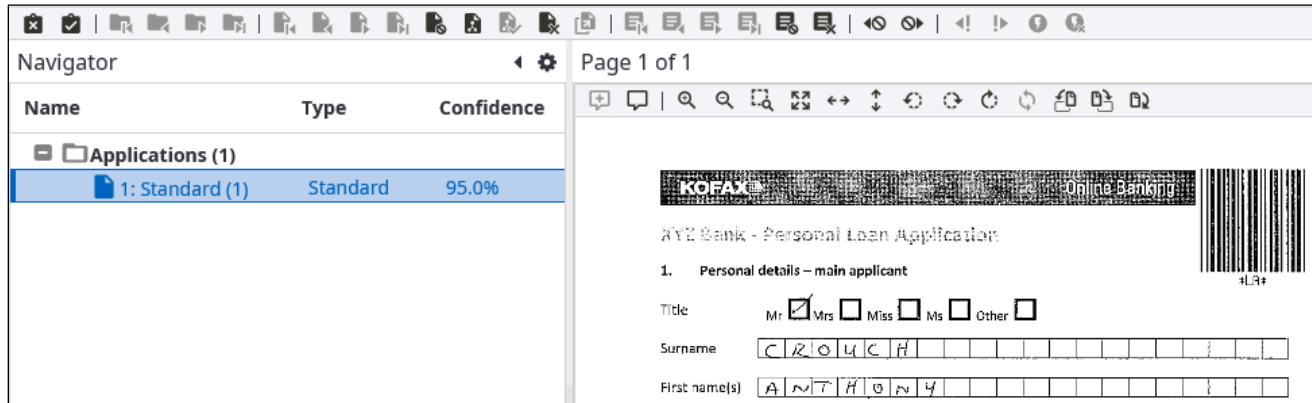
2. Click **Write**. Create the email as follows:



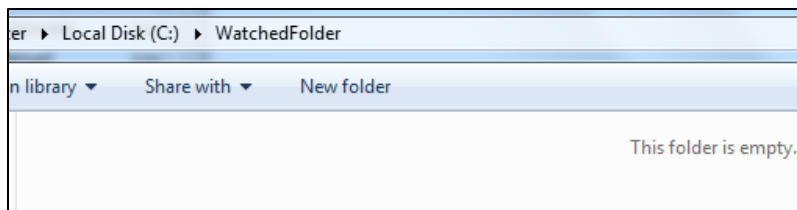
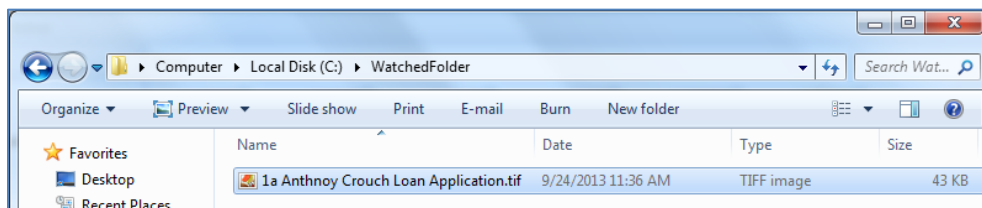
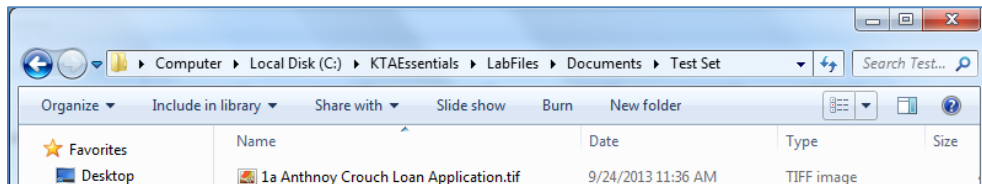
3. Click the **Attach** icon in the toolbar and attach **Anthony Couch Loan Application.tif** from the C:\KTAEssentials\LabFiles\Documents\Test Set.
4. Click **Send** and the email will be delivered to the TotalAgility@kofax.com email account and the email will be processed by the Import Connector based on its polling cycle.
Note: It can take up to one minute before a document is ingested into TotalAgility.
5. Click on the **xyzbank** workspace shortcut in the **browser** and logon as **pblack**.
6. The job should be pending at the **Document Review** activity.

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7. Select **To Do > Work Queue** and take the **Document Review** activity. Anthony's loan application (the attachment in the email) is displayed for review.



8. Click **Yes** to complete the activity.
9. To test the **Watched Folder** Import Source, run **Job clear down** option in **System settings**.
10. Copy one of the Applications from **C:\KTAEssentials\LabFiles\Documents\Test Set** to the **C:\WatchedFolder** and it will quickly be imported into Kofax TotalAgility.



11. Select **To Do > Work Queue**.
12. The **Document Review** activity should be pending.
13. Take the **Document Review** activity and ensure that the document that was added to the WatchedFolder is the document displayed on screen.
Notes: (i) A processed file is **deleted** from the Watched Folder.

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(ii) You can choose to **archive** the processed document to a different folder using the **Archive folder** option when configuring the Watched Folder settings.

14. **Cancel** the activity.

Lab Notes

IMAP

1. Selecting **IMAP** as the Type provides the option to **Keep message on server**. Use the same configurations settings as above, change only **Port** to **143**. Note that you can process messages from a different folder other than the Inbox.

Other Import Settings

2. You can also choose to import the complete message as an **EML** and/or **MSG** file type. Additional options are available for **Document normalization**, **VRS processing**, **Document archiving**, **Notification settings**, and **XML processing**. You will not configure these options in this class. Search for Import Settings in the online help if you wish to learn more about these settings.

Revision Questions

1. Give two examples of a passive import source?

2. Give two example of an active import source?

3. A designer who is testing an import source (IMAP mailbox) has raised a support ticket indicating that that new mail messages with attachments are not being picked up by TotalAgility. The mailbox connection has been tested and is working as expected. What additional checks should be carried out?

4. Is it possible to monitor a mailbox folder other than the Inbox?

5. Several files are copied to a watched folder. Using default settings will TotalAgility process all the files as one batch or will it process each one individually?

6. Can you apply a Scan / VRS profile to a file that has been added to a Watched folder?
