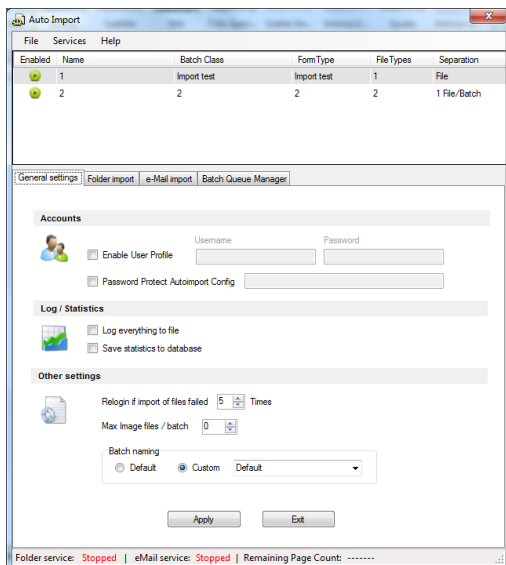


AutoImport 7.6

Installing the AutoImport

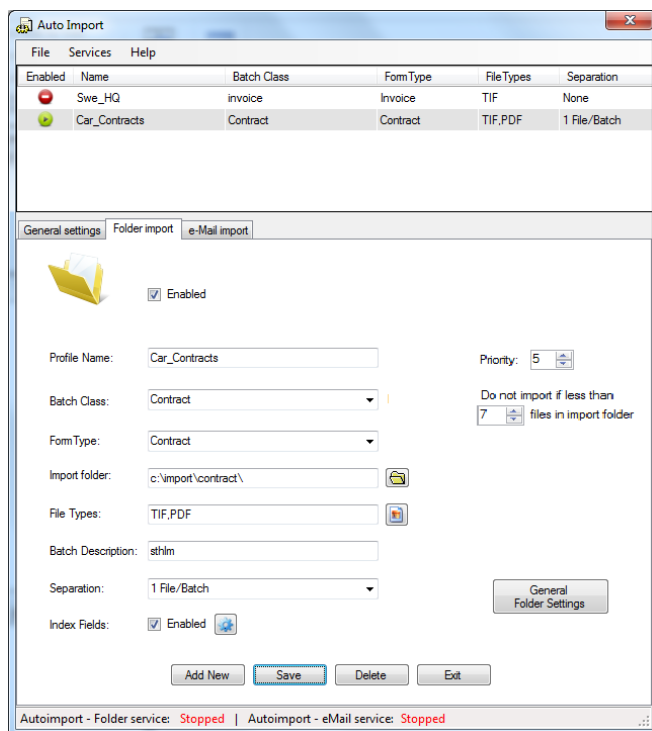
1. Install AutoImport on a PC that has Kofax installed.
2. Run the Autoimport.msi file.
3. Follow the on-screen instruction to complete installation.
4. Once the installation is complete, verify that *Autoimport_Folder service*, *Autoimport_eMail service*, *Autoimport_Batch service* and *Autoimport_Convert service* is installed by viewing the Service manager.
5. If you have files to be imported from a network path, change to a service account, instead of a system account in Service manager.

Configure Auto Import



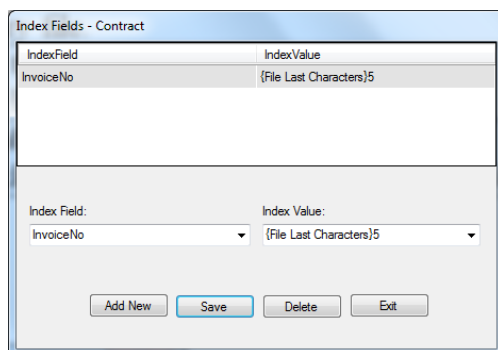
General Settings	Description
Enable User Profile	If you have user profile ON in Kofax, then you have to enable this to be able to login to Kofax and import files.
Username	Username that has access to all Batches
Password	Password
Password Protect Autoimport config	Set a password to protect access to all configurations.
Enable logging to file	Enable this if you have a problem and want to search for the problem. All logs are created in a sub folder called Logs in the Autoimport path. Example: YYYY-mm.log
Save statistics to database	Save all information about the file imported, filename, batchprofil name, page count, date and import folder.
Import Sync time (sec)	This is how often the program import files
Relogin if import of files failed	If Autoimport is unable to import the image files X-times, then Autoimport tries to login to Kofax again.
Max image files / batch	With this setting you can restrict your batch not to contain more than X image/files. It will make a new batch for every X image/file. Set "0" for no limit.

Batch naming	<p>Default is yymmdd{GUID}{OrgFilename}</p> <p>Custom you have below choices</p> <p>{Batch Description}</p> <p>{Batch profilename}</p> <p>{Last folder in importpath}</p> <p>{file owner} this option is only supported with 1 file/batches, the import folder must be on the local Kofax server, otherwise it cannot get the file owner of the file.</p>
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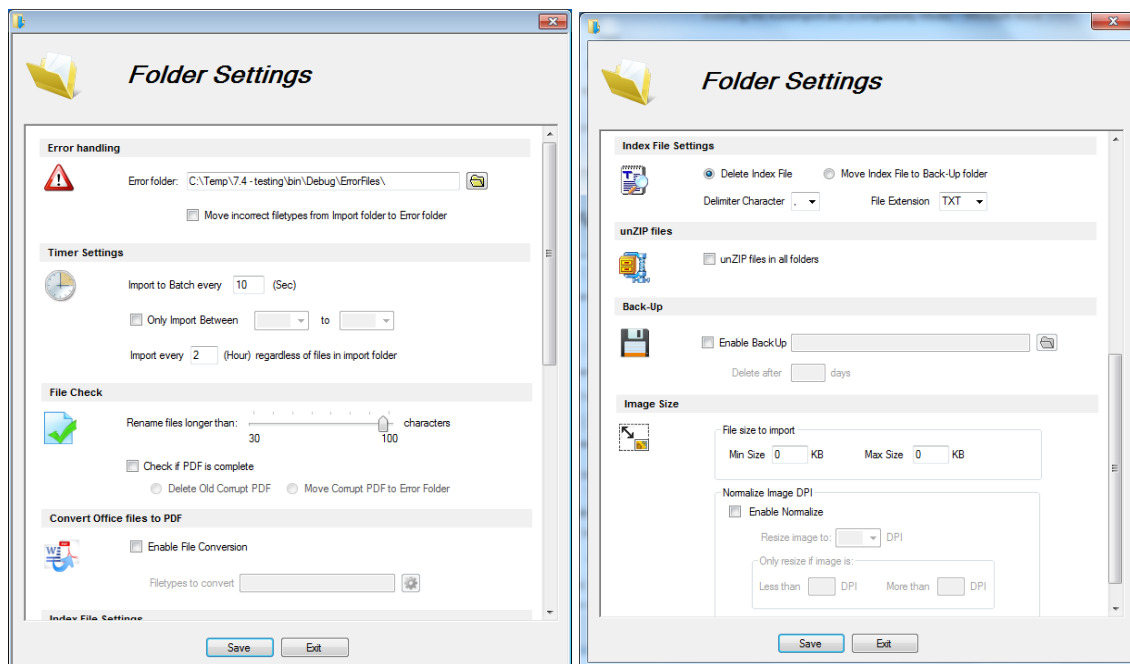
Folder import Settings	Description
Enable	Enable/disable batch
Profile Name	Profile Name for the import configuration. Allowed characters “a-z” and “_”
Batch Class	The combo box is prefilled with all batch classes from Kofax
Form Type	This is prefilled depending of Batch Class choice. You can choose “None” if you have separation to “File”
Import folder	Folder where all files is stored. Click the small button to the right to browse to the folder where you have the files. NOTE: If it’s a network folder use a UNC string instead of a mapped network folder.

File Types	Choose file format under the image button, you can add more file types by adding them to the file type textbox, separated by a comma.
Batch Description	Information field that can be used later in Kofax. For example in a document index field.
Separation	<p>Loose pages: Separations must be done in Kofax</p> <p>File: Each file will be one document.</p> <p>1 File/Batch: This creates a new batch for every file.</p> <p>1 File/Batch - loose pages: This creates a new batch for every file, and do not create any documents</p> <p>AI sepsheet / Fixed page 1: You must use a special AI separator sheet for this separation. You can mix <i>fixed pages 1</i> and a <i>patch code separation</i> in the same job. Autoimport will search for the barcode on the first page, If it finds this special barcode then path code separation is used, otherwise Autoimport will do fixed pages of 1 separation. Note: <i>Separation in Kofax must be set to patch separation, and only TIF is supported.</i></p>
Priority	Set the priority of every batch (1-10). 1=High, 10=low
Do not import if less than X files in import folder	<p>If you want to hold files in import folder until it has reached chosen value.</p> <p>Set a value higher than 1 in this field</p>
Batch Fields	<p>Possible to set values for three Batch Fields.</p> <p>{BatchID_Dec} BatchID in decimal format</p> <p>{BatchID_Hex} BatchID in Hexadecimal format</p> <p>{PadLeft_BatchID_Dec} BatchID with zeros before and max 8 char long "00000300"</p> <p>{PadLeft_BatchID_Hex} BatchID with zeros before and max 8 char long "0000012C"</p> <p>{Full importpath} The full path of importfolder</p> <p>{Last folder in importpath} only the last folder</p>
Index Fields	<p>Enables possibility to add index values.</p> <p>Click the cogwheel to configure index fields.</p>



Index Fields	Index Field from Kofax
Index Value	Index value to set (<i>only change the numbers</i>)
Values	Explanation / Examples
{BatchID_Dec}	e.g. 300
{BatchID_Hex}	e.g. 12C
{DocumentID_Dec}	e.g. 500
{DocumentID_Hex}	e.g. 1F4

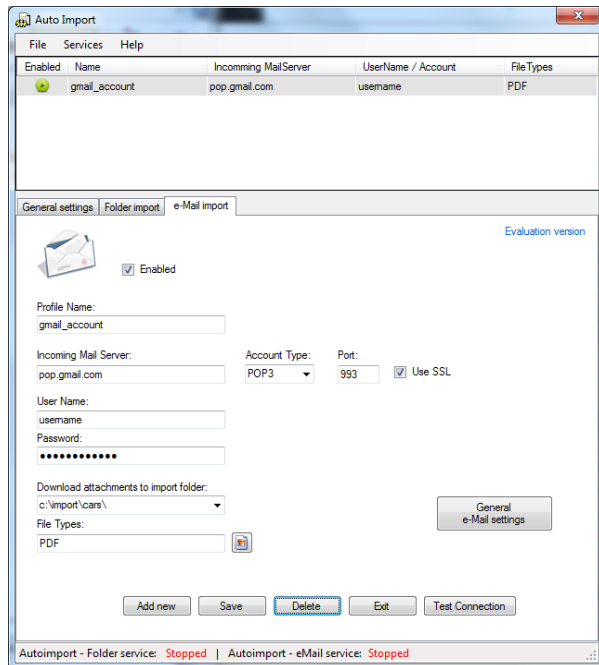
{PadLeft_BatchID_Dec}	e.g. 00000300
{PadLeft_BatchID_Hex}	e.g. 0000012C
{PadLeft_DocumentID_Dec}	e.g. 00000500
{PadLeft_DocumentID_Hex}	e.g. 000001F4
{File Creation Time}	e.g. output "12:45:58"
{File Creation Date}	e.g. output "2012-06-10"
{File Creation Date & Time}	e.g. output "2012-06-10 12:45:58"
{File Name without extension}	Original filename without the extension
{File Name with extension}	Original filename with the extension
{File First Characters}6	First characters of the imported file Sweden_HQ_Invoice.TIF would be "Sweden"
{File Last Characters}7	Last characters of the imported file Sweden_HQ_Invoice.TIF would be "Invoice"
{File Middle Characters}7,2	Middle characters of the imported file Sweden_HQ_Invoice.TIF would be "HQ"
{File Dynamic Split}#,2	This one can take a name that is varied in a file name. We use a split array to accomplish this. In the e.g. to the left we use a # to split the file into strings. If the file is named Paris#invoice#cars.tif the output would be "invoice"
{Full importpath}	e.g. output "c:\import\Paris\invoices\"
{Last folder in importpath}	e.g. output "invoices"
{Comma-separated textfile}2	Reads a comma-separated file (can change delimiter and file extension in configuration) e.g. to the left we take the second position in the text file. e.g. CSV file: Paris,London,New York,Stockholm output "London"



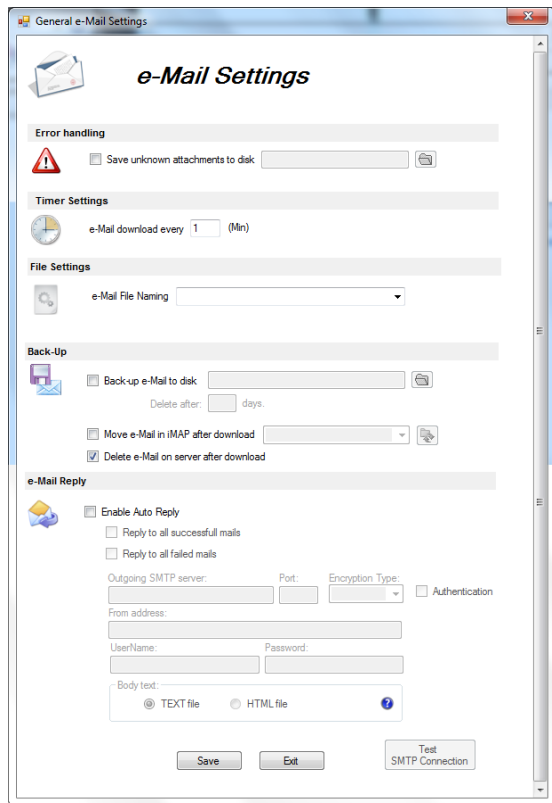
More Folder Settings	Description
Error folder	Move failure, unsupported files like “secured PDF files” or corrupt files to this folder for later manual analyse. A subfolder is created with the name of the profile name.
Move incorrect file types from import folder to error folder	If you want to clear the import folder from unwanted file types, then enable this checkbox. Files are renamed IFT-<GUID> <original filename>
Import to Batch every xx (sec)	Set the time interval to import files
Import every xx (hours) regardless of files in import folder	If you use the function not to import until xx files is in the import folder, then you can set a time to force an import.
Only Import Between	Set a time of day to import files between
Check if PDF is complete	Check if PDF has all pages and ready for importing. Some multi machines create a file and close the file, and reopen again to add more pages.
Rename files longer than	Set a value to shorten filename, if they are very long, Kofax 9 has a limit around 40 characters
Delete or Move PDF	If PDF is corrupt we can delete the file or move the file (value is 1 day)
Enable file conversion	Enables to convert MS Office files to PDF
File types to convert	Click the button to select witch file types to convert. Different type of Word, Excel and PowerPoint is working.
Index file settings	If you have index file selected under index values then you can configure behaviour.
Delimiter Character	A delimiter to use when you want to split index file values.
File Extension	Extension of the index file. (TXT or CSV) the index file must have the same name as the image file to be able to read the correct file.
UnZIP files	Enable decompression of ZIP files, It decompress all files and after that deletes the ZIP file.
Enable Back-Up	Check this and select path where to save all imported files.
Delete after X times	Choose number of days to keep backup files.
Min File Size to import	Set min file size in Kilobytes to import. If file is smaller than xxx KB it is moved to the error folder. Set “0” for no limit.
Max File Size to import	Set max file size in Kilobytes to import. If file is larger than xxx KB it is moved to the error folder. Set “0” for no limit.
Enable logging to file	Enables logging to a monthly file in the subfolder logs, it logs time, action and filename of files being imported.
Enable Normalize DPI	Change DPI of image, TIF,JPG,BMP,PNG,GIF can be normalized
Only resize if image is	Set the min and max value to normalize image. All images in-between min and max value are not affected.
Resize image to	Set the DPI setting to normalize image to xx DPI.

e-Mail import

Downloads attachments via POP3 or iMAP, and saves those to a folder. To have this working you must have a folder import configured first. Because e-mail import saves files in the Folder import and then Folder import, imports this to Kofax.



e-Mail import Settings	Description
Enable	Enable/Disable profile from downloading images.
Profile Name	A Profile Name for the import configuration. Allowed characters “a-z” and “ ”
Incoming Mail Server	Server to download e-mails from
Account Type	Choose between POP3 or iMAP
Port	Type in correct port to use. Hold mouse over the text field to see all default ports.
Use SSL	Mark this if you must use SSL connection.
User Name	e-mail account username
Password	e-mail account password
Download attachment to import folder	Folder to import attachments to, choose a folder from dropdown, save files in the correct import folder for desired batch.
File Types	Choose file format under the image button, you can add more file types by adding them to the file type textbox, separated by a comma.



More Settings	Description
Save unknown attachments to disk	Saves all other attachments that you don't have specified to disk. A subfolder is created with the name of the profile name.
e-Mail download every xx (Min)	Set time interval to download e-Mails.
e-Mail File Naming	Name the e-mail attachments with a custom name to use later as an index value. Adds this variable and “#” before the original filename. Then you can use the dynamic split to get the value to an index field. {Default} {All After @} {All Before @} {Email Subject} {Full email address} {All Before @}#{All After @}
Back-up e-mail to disk	Saves e-mail to disk as an EML file. A subfolder is created with the Profile Name.
Delete after XX days	Days to keep the EML file before it's getting deleted, 0 = Never delete.
Move e-mail in iMAP after download	This moves the iMAP e-mail to a different folder. If you have this enabled, delete mail on server is ignored. When you click checkbox it tries to get the subfolder from your mailbox. You can click on the refresh button to get all subfolders.
Delete mail on server after download	Removes e-mail from server
Enable Auto Reply	Reply to e-mail that is downloaded
Reply to all successful mails	Reply to e-mail that has a correct attachment that you

	have specified. Modify text in <i>success.txt</i> or html version <i>success.htm</i> .
Reply to all failed mails	Reply to email that has no attachment or wrong attachment. Modify text in <i>failure.txt</i> or html version <i>failure.htm</i> .
Outgoing SMTP server	SMTP relay server
Port	SMTP port
Encryption Type	If SMTP server requires any encryption.
Authentication required	If server requires a login
From address	From address that will be in the autoreply e-mail.
Username and Password	Username and password for sending SMTP e-mail via SMTP relay server.
Body text	Choose between a simple TEXT file or a more fancy HTML file for your body text. Press question mark for link to HTML editor. The files are located under install directory <install directory>\BodyText
Test SMTP connection	Test if your SMTP connection is working.




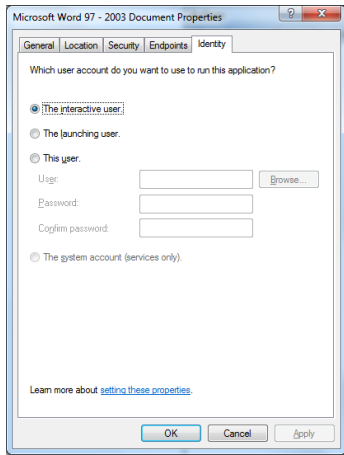
Autoimport – Convert

To be able to convert Office files like Word, Excel or PowerPoint to PDF. You must first install Microsoft Office 2010 (Word, Excel, PowerPoint) on the same computer as Kofax and Autoimport.

Start all applications (Word, Excel, PowerPoint) at least once and respond to the initial prompts.

Note: Customers are responsible for providing appropriate licenses for third-party software

You have to configure some settings on the computer to get this to work.

(64 bit OS + 64 bit Office) or (32 bit OS + 32 bit Office)	64 bit OS with 32 bit Office
<ul style="list-style-type: none"> • Start • Run • Type dcomcnfg • Console Root • Component Services • Computers • My Computer • DCOM Config 	<ul style="list-style-type: none"> • Start • Run • Type mmc -32 • File • Add Remove Snap-in • Component Services • Add • OK • Console Root • Component Services • Computers • My Computer • DCOM Config
<p>Right click on each component and choose Properties</p> <p>  Microsoft PowerPoint Slide  Microsoft Excel Application  Microsoft Word 97 - 2003 Document </p>	
<p>Change to The interactive user and click OK</p> 	

Start *Autoimport – Convert* service and configure the service to start automatically.

Autoimport – Convert is checking for new Office files every 20 second, in every import folder for all batches that you have configured, and is enabled.

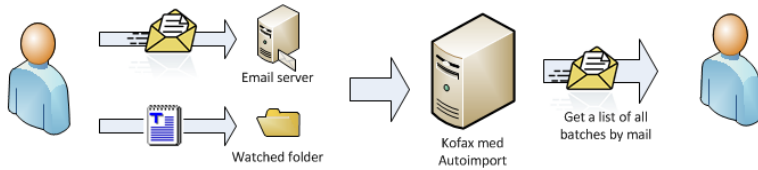
Remote Batch Management

With Remote Batch Management you can have the Batch Queue list mailed to you.
Or you can remotely delete batches. This is great if you don't have access to the Batch Manager.
This could be if you only work with web validation and

Batch Queue mailed to you:

Type your email address in a textfile and name it **BatchList.txt**

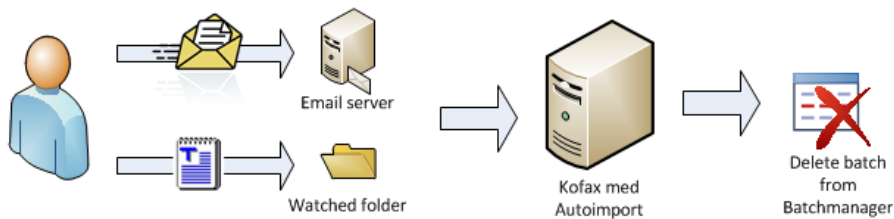
You have two choices, mail the textfile to any email profile, or save the file to the watched folder.



Delete batch or batches:

Type the batch name of the batch you want to delete in a textfile and name it **BatchDelete.txt**

You have two choices, mail the textfile to any email profile, or save the file to the watched folder.



Note: You have to have the service *Autoimport_Convert* running.

Event ID codes

Below is a list of all event ID errors that can be found in the Event viewer.

Event ID	Problem description
7001	[Auto Import] Problem when loading app, and pass in user data.
7002	[Auto import] Problem when stopping service.
7003	[Auto import] Problem when renaming files.
7004	[Auto import] Problem delete old files.
7005	[Auto Import] Problem to close the batch.
7006	[Auto Import] Problem with MDB database.
7007	[Auto Import] Problem with deleting files after import.
7008	[Auto Import] Problem with moving files to backup folder.
7009	[Auto Import] problem with importing files into Kofax.
7010	[Auto Import] License problem.
7011	[Auto Import] Problem to import files to batch.
7012	[Auto Import] Problem with moving files when import failure.
7013	[Auto Import] Auto restart of service after count reached.
7014	[Auto Import] Error to normalize image DPI settings.
7015	[Auto Import] Problem to Encode/Decode password.
7016	[Auto Import] Problem to write to logfile.
7101	[Configuration] Problem to login to Kofax.
7102	[Configuration] Problem when exit program.
7103	[Configuration] Error get registry values.
7104	[Configuration] Problem to save record in folder tab in MDB.
7105	[Configuration] Problem to delete record in folder tab in MDB.
7106	[Configuration] Problem to save record in email tab in MDB.
7107	[Configuration] Problem to delete record in email tab in MDB.
7108	[Configuration] Problem to Encode/Decode password.
7109	[Configuration] Problem to delete indexfield.
7109	[Configuration] Problem to load indexfields.
8001	[Configuration] Problem to get info from MDB when click e-mail import tab.
8002	[eMail import] Problem with connection to MDB
8003	[eMail import] Problem with POP3 connection/download.
8004	[eMail import] Problem with iMAP connection/download.
8005	[eMail import] Problem to delete files in backup folder.
8006	[eMail import] Problem sending SMTP mail.
8007	[eMail import] Problem to Encode/Decode password.

Configuration (Separation = “None”)

When choosing separation “None”, formtype is greyed out and cannot be selected.

And if you have one formtype then Kofax choose that automatic, and if you have more than one, then Kofax just numbers the documents 1,2,3,..... and you have to do some sort of separation in Kofax.

Auto Import Features

- Auto Import removes empty documents in the batch before closing the batch.