

Kofax Copitrak

iManage Connector Installation and Configuration Guide

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The KOFAX logo is displayed in a bold, blue, sans-serif font. The letters are thick and closely spaced, with a consistent weight throughout the word.

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Table of Contents

1.	Prerequisites	2
	Configuration steps.....	2
2.	iManage Scan Connector	3
	Install iManage Scan Connector	3
	Configure iManage Scan Connector	3
	Login Methods.....	3
	Configure DMS Server	4
	Configure DMS Route in Scantrak.....	5
	Configure DMS Route Prompts on Eclipse	5
	Configure iManTools.exe file	9
	Configure iManHelper.dll file.....	10
	Configure Client-Matter Formula.....	11
3.	iManage Print Connector	13
	Install and Uninstall Print Connector	13
4.	Configure REST API.....	15
5.	Scanning Modes.....	16
	Workspace Mode	16
	My Matters Mode.....	17
	Flatspace Mode.....	17
	Top-level directories mode	18
	All directories mode	19

1. Prerequisites

The Kofax Copitrak iManage Connector is used to communicate with the iManage Server. The iManage server can be a cloud server or a local server hosted on a Windows machine.

The iManage Connector supports two different mechanisms to communicate with iManage Server:

1. COM interface to communicate with iManage server using iManage Client (commonly known as iManage DeskSite/WorkSite).
2. REST API to communicate with iManage Server directly via REST calls.

Before starting the configuration, confirm the following information with iManage:

1. iManage server name or IP address.
2. Database name for iManage cloud server.
3. Login credentials to the iManage cloud server.
4. The destination port of the cloud server if the connection is established to a cloud server.
5. To communicate with iManage cloud server, the iManage.dll (x86) 9.3.x must be registered. The installation of the worksite automatically registers the iManage.dll. If worksite 9.3.x(DeskSite 9.3.x(x86) or FileSite 9.3.x(x86) etc.) is installed, iManage.dll is registered automatically.
6. Copitrak CSS Server 700R2 SP2.17 or 700R3 is required to run this configuration.
7. IManHelper.dll version 1.1.15.0 and iManTools.exe version 1.5.1.0 or newer versions are required.

Configuration steps

1. Configure the server name and the database. Log in Copitrak Config File Manager, go to the Scantrak configuration page, and configure the Server and the database name as shown below.
2. Update the iManTools.exe.Config for the iManage cloud server and the database.

Here is a sample configuration for the server and the database.

```
<add key="Server" value="sdksandbox.goimanager.com" />
<add key="Database" value="TPSDK" />
```

3. Configure the port to communicate with the server.

Note: If the ports in use to communicate are not the default ports (1080 and 1081), they must be changed. For example, if the server is using port 1090, you need make the following change from the registry to use port 1090 as shown. Copy the script below into a text file named changeport.reg, and execute changeport.reg.

```
Windows Registry Editor Version 5.00
[HKEY_LOCAL_MACHINE\SOFTWARE\WOW6432Node\Interwoven\WorkSite\8.0\Com
mon\Options] "Use Hosted DM"="Y"
```

"Hosted DM ServicePort"=dword:00000442

"Enable Hosted DM SSL"="Y" "Use SSL Compression"="Y"

2. iManage Scan Connector

Required Files for iManage Scan Connector:

- LCWIN 2019.0.139 or above
- DmsPlugin.dll v1.x.x.x
- Imanhelper.dll v1.x.x.x
- Imantools.exe v1.x.x.x
- Interop.Imanage.dll

Install iManage Scan Connector

1. Run the installer on the system where Copitrak Server is already installed. The installer shows progress as it deploys the files.

To install in silent mode, run the following command from an administrator command prompt:

```
msiexec /i iManScanInstaller.x.x.x.x.msi /qn
```

The installer performs the same way, whether it is executed in normal mode or silent mode. It finds the path to CSS installation (usually `c:\ers`) and deploys files under the DMS subfolder. If an older manually deployed version of this connector is found, installer makes a backup copy of it before proceeding.

When the scan connector is installed, it appears in Control Panel, Programs and Features as Kofax iManage Scan Connector.

Configure iManage Scan Connector

Login Methods

1. Global Impersonation
Uses NetworkID value from ERS and global impersonation password from the `imanhelper.dll.config` file.
2. Admin User
Grants access to all workspaces. This is non-trusted authentication
User and Password are hardcoded in `imanhelper.dll.config` and `imantools.exe.config` files.

```
<add key="User" value="UserName" />  
<add key="Password" value="6wwwn0TL2g=" />
```
3. Admin User

Grants access to all workspaces. This is a trusted authentication
 Uses service account credentials from pmkserviceman service.

Services (Local)					
Name	Description	Status	Startup Type	Log On As	
PmkServiceMan	ERS Servic...	Started	Automatic	copitrak@chs.choate.com	

Configure DMS Server

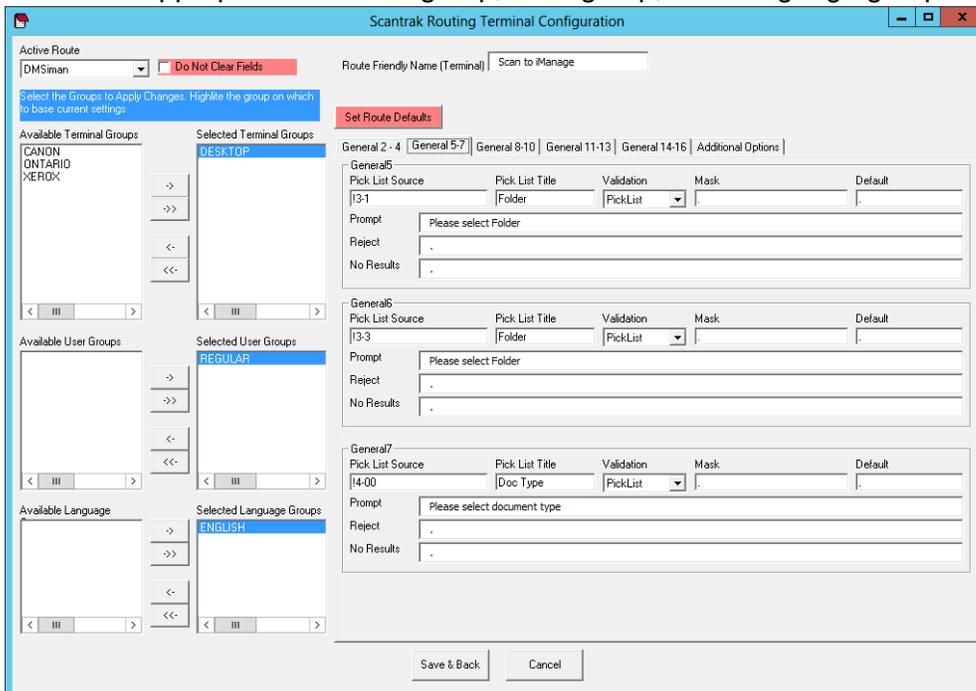
1. Open Config File Manager.
 2. Press the Scantrak button.
 3. Choose DMS System.
 4. Enter the DMS server name.
 5. Enter Default Database Name.
 Only required when not prompting for database at Eclipse terminal. Useful for sites that only have a single database selection.
 6. Do not select Trusted Connection when using these login methods:
 Global Impersonation
 Admin User (Non-Trusted)
 7. Open Imantools.exe.config file from "ERS\DMS\iManage\Imantools\" with Notepad or another text editor.
 8. Modify the server value in the configuration file (iManTools.exe.Config). In the section <appSettings>, type <add key="Server" value="your DMS server name" />.
 9. Save and close the file.
 10. Open a Command Prompt.
 11. Browse to the "ERS\DMS\iManage\Imantools" folder.
 12. Type the following command to encrypt the global password.
 imatools -pwd PASSWORD
- Note: Disregard the error message. If you use REST API configuration, run
 imatools -pwd PASSWORD -client_id YOUR_REST_CLIENT_ID -client_secret YOUR_REST_CLIENT_SECRET.
13. Open imantools.exe.config from ERS\DMS\iManage\Imantools\with an editor. You can see an encrypted password.
 14. Copy the entire password line to the clipboard.
 15. Open imanhelper.dll.config from ERS\DMS\iManage\Imantools\.
 16. Paste the Password line from the clipboard into the "AppSettings" section. Save and close the file. In the section <appSettings>, type <add key="Password" value="your encrypted password" />.

Configure DMS Route in Scantrak

1. Open Config File Manager.
2. Press the Scantrak button.
3. Press the “XML Routing” button.
4. Add a Route.
Typically DMS is used for the description
Action is EXE-“D:\ers\dms\iManage\imantools\imantools.exe”. Drive letter must correspond to your setup.

Configure DMS Route Prompts on Eclipse

1. Open Config File Manager.
2. Press the “Terminal/User Options” button.
3. Expand the default User group.
4. Set “General1PickXX” to value “1”.
5. Set “General1Pick0” to value “DMS%%Scan to iManage”.
6. Press Close.
7. Press the Scantrak button.
8. Press “XML Routing”.
9. Press the “Terminal Setup” button.
10. Select Active Route “DMS”.
11. Select the appropriate Terminal group, User group, and Language group.



Scantrak Routing Terminal Configuration

Active Route: Do Not Clear Fields

Route Friendly Name (Terminal):

Select the Groups to Apply Changes. Highlight the group on which to base current settings.

Available Terminal Groups: CANON, ONTARIO, XEROX

Selected Terminal Groups: DESKTOP

Available User Groups:

Selected User Groups: REGULAR

Available Language:

Selected Language Groups: ENGLISH

Set Route Defaults

General 2 - 4 | General 5-7 | **General 8-10** | General 11-13 | General 14-16 | Additional Options

General8

Pick List Source	Pick List Title	Validation	Mask	Default
4.99D	SubType	PickList	.	.
Prompt: Please select Document subtype				
Reject: .				
No Results: *				

General9

Pick List Source	Pick List Title	Validation	Mask	Default
.	.	Default	.	.
Prompt: .				
Reject: .				
No Results: *				

General10

Pick List Source	Pick List Title	Validation	Mask	Default
4.98	Author	PickList	.	.
Prompt: Please select Author				
Reject: .				
No Results: .				

Save & Back | Cancel

Scantrak Routing Terminal Configuration

Active Route: Do Not Clear Fields

Route Friendly Name (Terminal):

Select the Groups to Apply Changes. Highlight the group on which to base current settings.

Available Terminal Groups: CANON, ONTARIO, XEROX

Selected Terminal Groups: DESKTOP

Available User Groups:

Selected User Groups: REGULAR

Available Language:

Selected Language Groups: ENGLISH

Set Route Defaults

General 2 - 4 | General 5-7 | General 8-10 | **General 11-13** | General 14-16 | Additional Options

General11

Pick List Source	Pick List Title	Validation	Mask	Default
X	.	Default	.	.
Prompt: .				
Reject: .				
No Results: .				

General12

Pick List Source	Pick List Title	Validation	Mask	Default
X	.	Default	.	.
Prompt: .				
Reject: .				
No Results: .				

General13

Pick List Source	Pick List Title	Validation	Mask	Default
X	.	Default	.	.
Prompt: .				
Reject: .				
No Results: .				

Save & Back | Cancel

Scantrak Routing Terminal Configuration

Active Route: **DMSiman** Do Not Clear Fields

Route Friendly Name (Terminal): **Scan to iManage**

Select the Groups to Apply Changes. Highlight the group on which to base current settings

Set Route Defaults

Available Terminal Groups: CANON, ONTARIO, XEROX

Selected Terminal Groups: **DESKTOP**

Available User Groups: (empty)

Selected User Groups: **REGULAR**

Available Language: (empty)

Selected Language Groups: **ENGLISH**

General 2 - 4 | General 5-7 | General 8-10 | General 11-13 | **General 14-16** | Additional Options

General14

Pick List Source	Pick List Title	Validation	Mask	Default
X	.	Default	.	.

Prompt: .
Reject: .
No Results: .

General15

Pick List Source	Pick List Title	Validation	Mask	Default
.	.	Default		.

Prompt: .
Reject: .
No Results: .

General16

Pick List Source	Pick List Title	Validation	Mask	Default
.	Doc Description	Open	.	mydocument

Prompt: Please enter document name
Reject: .
No Results: .

Save & Back Cancel

Scantrak Routing Terminal Configuration

Active Route: **DMSiman** Do Not Clear Fields

Route Friendly Name (Terminal): **Scan to iManage**

Select the Groups to Apply Changes. Highlight the group on which to base current settings

Set Route Defaults

Available Terminal Groups: CANON, ONTARIO, XEROX

Selected Terminal Groups: **DESKTOP**

Available User Groups: (empty)

Selected User Groups: **REGULAR**

Available Language: (empty)

Selected Language Groups: **ENGLISH**

General 2 - 4 | General 5-7 | General 8-10 | General 11-13 | General 14-16 | Additional Options

Route Specific Options

Account Validation: Validated (Open Com Fail)

Account Default: .

Non Preview Route

Menu Key on Enablement Screen

Show Next File Key
Next File Text: .

Preview Next Job Key Auto Next/Menu/Back

Show Bates General 2

Show Bates General 3

Show Bates General 4

Show Bates General 5

Show Bates General 6

Show Bates General 7

Show Bates General 8

Show Bates General 9

Show Bates General 10

Show Bates General 11

Show Bates General 12

Show Bates General 13

Show Bates General 14

Show Bates General 15

Show Bates General 16

Save & Back Cancel

12. Make changes based on the selected mode: workspace, flat space or my matters mode.

Picklist Source	Description
!0	Server Selection. Returns a list of available servers from iManage. *Not required when only one server exists. Reads default server from winers.ini
!1	Database Selection. Returns a list of available databases on the server selected.
!2	Workspace Selection. Returns all available workspaces for selected client-matter
!2-1	My Matters Mode. Returns all folders/Workspaces/shortcuts in selected users My Matters container from iManage. *This mode requires to be used with user impersonation login.
!2-2	Flatspace (prompt is auto skipped since result list always contains 1 item)
!2-XXD	Any of the above modes with default database read from winers.ini section: [DMS SERVER OPTIONS] Database=XXX Ex: !2-00D , !2-01D, !2-02D *!2-00 is the same as !2
!2-00DXXX	Workspace Selection with default database. Replace XXX with database name. ex: !2-00DACTIVE Active is database name in above example.
!3	Folder Search. This search returns all available folders within the workspace. If a folder contains subfolder it is displayed as: folder\subfolder
!3-1	Folder Selection. Returns all root folders within a workspace. Flatspace Mode: In Flatspace mode (!2-2) this list always contains 3 results.
	 <p>The screenshot shows a software interface with a dark red header bar containing the text 'Worksite (1 - 3)' and a dropdown arrow. Below the header is a navigation bar with left and right arrows. The main content area is divided into three sections: 'Worklist' with a yellow folder icon, 'My Folders' with a blue folder icon, and 'Other Folders' with a blue folder icon. Each section is separated by a dotted line.</p>

Picklist Source	Description
!3-2	Search from Root folder selected in previous general field (!3 or !3-1).
!3-3	Search from Root folder selected in previous general field (!3 or !3-1). This prompt only displays subfolders within the Root folders. Also allows the user to drill down to any folder within the tree. Prompt is reused to display the new folders within the previous selected folder. **When in Flatspace mode, if the worklist is selected, it indicates to profile to Document Worklist in iManage and auto skips this prompt.
!4-00	Document Class (displays a picklist of all the available Classes that can be used on the Document profile) Optional parameters: !4-00D (Indicates to use default class if one is profiled on the selected destination folder.)
!4.99	Document Sub Class displays a list of any available Documents sub classes based on the previously selected class. Optional parameters: !4-99D (Indicates to use default sub class if one is profiled on the selected destination folder.)
!4.XX	Additional Properties required for Profiling. Replace XX with the Custom Field value in iManage. This can be obtained from a PRM file when printing a document. Ex: Department is usually Custom3 (!4.03)
!4.98	Author. Displays a list of all the available Author values from iManage.

Configure iManTools.exe file

When you run iManTools.exe from command line, it encrypts your REST client id and REST client secret. It also updates imantools.exe.config file with the encrypted values.

1. Open imantools.exe.config file from "ERS\Winers\Imantools" folder.
2. Edit all values to reflect the corresponding General Field values as shown below.

```
<appSettings>
  <add key="Trusted" value="false" />
  <add key="Server" value="YOUR_IMANAGE_SERVER_NAME" />
  <add key="WorkSpace" value="GENERAL4" />
  <add key="WorkFolder" value="GENERAL5" />
  <add key="Author" value="GENERAL10" />
  <add key="MatterOnly" value="false" />
  <add key="Client" value="Client" />
</appSettings>
```

```

<add key="Matter" value="Matter" />
<add key="ClientCode" value="true" />
<add key="ClientMatterSplitter" value="-" />
<add key="Description" value="GENERAL16" />
<add key="DocType" value="ACROBAT" />
<add key="Database" value="GENERAL3" />
<add key="DocClass" value="GENERAL7" />
<add key="DocSubClass" value="GENERAL8" />
<add key="imProfileCustom3" value="GENERAL9" />
<add key="DocSecurity" value="" />
<add key=".pdf" value="ACROBAT" />
<add key=".tif" value="TIFF" />
<add key=".rtf" value="WORD" />
<add key=".doc" value="WORD" />
<add key=".docx" value="WORD" />
<add key=".jpg" value="JPEG" />
<add key="Retries" value="1" />
<add key="DocSource" value="TERMTYPE" />
<add key="Smtphost" value="" />
<add key="Subject" value="Your scan has been profiled" />
<add key="BodySuccess" value="" />
<add key="BodyFailed" value="" />
<add key="DocNumberNRI" value="true" />
<add key="ClientSettingsProvider.ServiceUri" value="" />
<add key="Password" value="qmD6lAX6JkbelXHVlS9uZw==" />
<add key="PreventFlatSpaceFiling" value="true" />
<add key="ignore_ssl" value="true" />
<add key="rest_client_id"
value="YOUR_ENCRYPTED_REST_CLIENT_ID" />
<add key="rest_client_secret"
value="YOUR_ENCRYPTED_REST_CLIENT_SECRET" />
</appSettings>

```

3. Save and close.

Configure iManHelper.dll file

1. Open imanhelper.dll.config file from "ERS\DMS\iManage\iManHelper" folder.
2. Edit all values to reflect the corresponding General Field values from below.

```

<appSettings>
<add key="server" value="YOUR_IMANAGE_SERVER_NAME" />
<add key="Trusted" value="false" />
<add key="ClientMatterSplitter" value="-" />
<add key="Client" value="Client" />
<add key="Matter" value="Matter" />
<add key="Mode" value="1" />
<add key="PreferredDatabase" value="false" />
<add key="MaxRowsForSearch" value="32" />
<add key="WorkspaceSearchType" value="Absolute" />

```

```

<add key="ignore_ssl" value="true" />
<!-- <add key="MatterLength" value="6" /> -->
<!-- <add key="ErsMode" value="ture" /> -->
<!-- <add key="ClientAttributeID" value="imProfileCustom3" /> -->
<!-- <add key="MatterAttributeID" value="3" /> -->
<!-- <add key="Encoding" value="10008" /> -->
<add key="ClientSettingsProvider.ServiceUri" value="" />
<add key="Password" value="qmD6lAX6JkbelXHVlS9uZw==" />
<add key="rest_client_id" value=" YOUR__ENCRYPTED_REST_CLIENT_ID"
/>
<add key="rest_client_secret"
value="YOUR__ENCRYPTED_REST_CLIENT_SECRET" />
</appSettings>

```

Note: If you use REST API, continue with the next step.

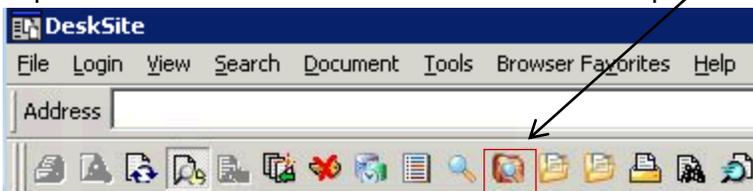
3. Copy rest_client_id and rest_client_secret from iManTools.exe.config file to iManHelper.dll.config file.

Configure Client-Matter Formula

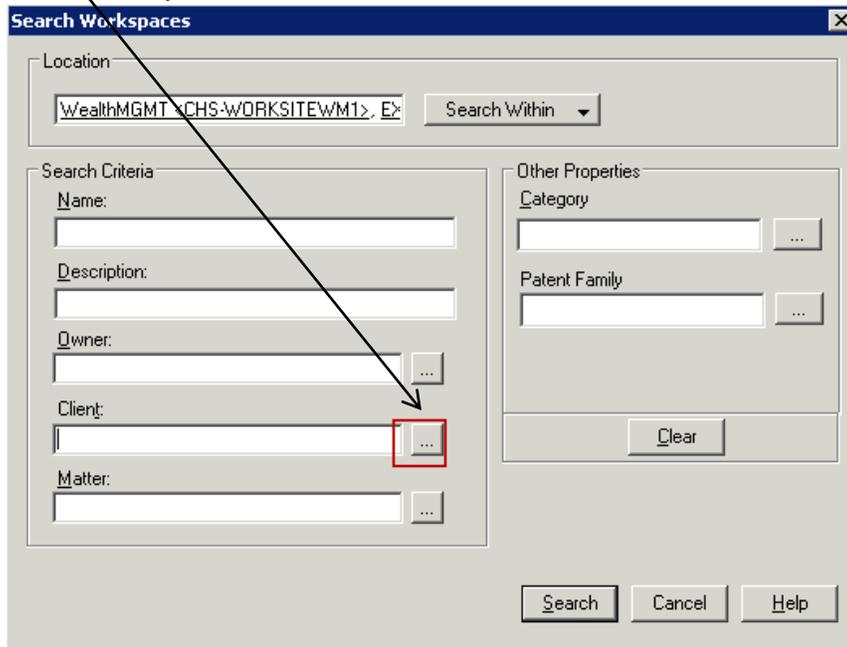
1. Verify the current client-matter structure in ERS.

Account to Validate	Account to Bill
2008021-0000	2008021-0000

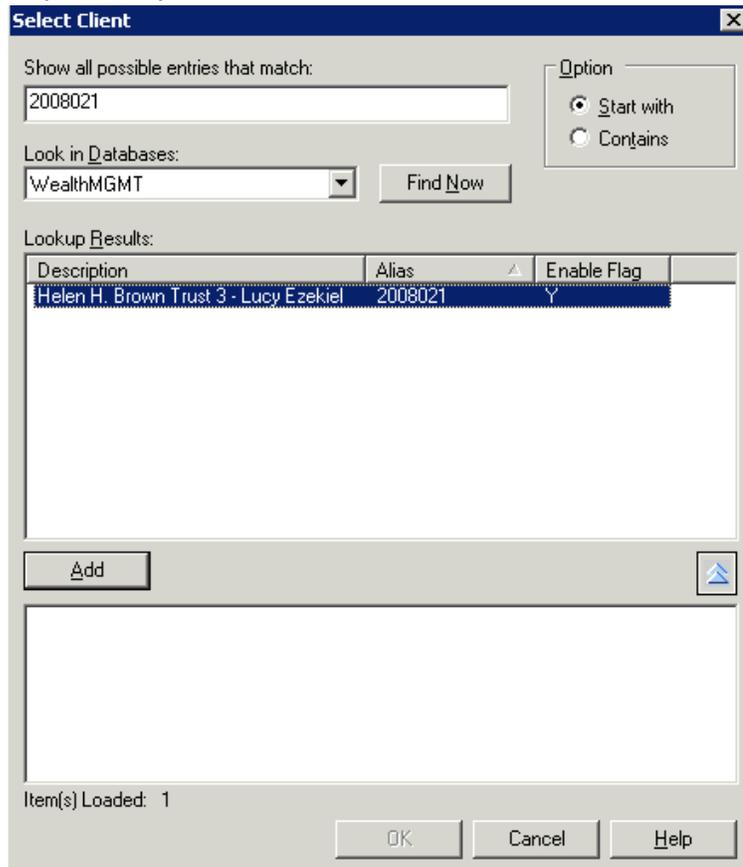
2. Verify client-matter structure in Desksite/Filesite.
3. Open Desksite/Filesite and choose "search workspaces."



- Press the ellipsis button.



- Search for client "2008021" and click "Find Now". Verify that format is the same as ERS. Repeat the process for Matter.

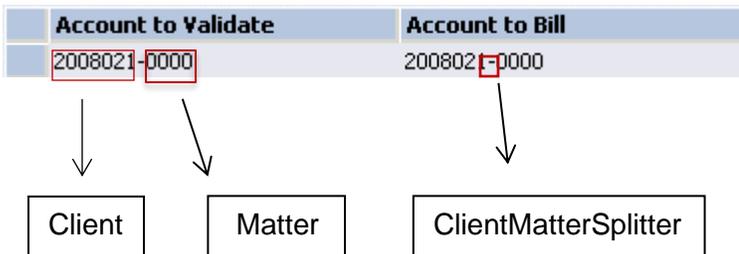


- Open `imantools.exe.config` and modify the Client Matter formula as needed.

```

iManTools.exe.Config - Notepad
File Edit Format View Help
<?xml version="1.0" encoding="utf-8"?>
<configuration>
  <configSections>
    <section name="log4net" type="log4net.Config.
    <section name="IManProfileAttributes" type="i
  </configSections>
  <appSettings>
    <add key="Server" value="CHS-WORKSITEWM1" />
    <add key="DataBase" value="GENERAL4" />
    <add key="workspace" value="GENERAL5" />
    <add key="workFolder" value="GENERAL7" />
    <add key="Author" value="GENERAL10" />
    <add key="Client" value="Client" />
    <add key="Matter" value="Matter" />
    <add key="ClientMattersplitter" value="-" />
  </appSettings>
</configuration>

```



Example Configuration:

If you have the following values on desksite:

Client=2008021

Matter=2008021-0000

Configure file values are the following.

```

<add key="Client" value="Client" />
<add key="Matter" value="Client+ClientMattersplitter+Matter" />
<add key="ClientMattersplitter" value="-" />

```

3. iManage Print Connector

Install and Uninstall Print Connector

- Run the installer. Make sure that Copitrak Desktop is already installed. The installer deploys files under the existing desktop client folders. If the desktop client is not installed, the installer displays an error.

To install iManage Print Connector in silent mode, run the following command from administrator Command Prompt:

```
msiexec /i iManPrintInstaller.x.x.x.x.msi /qn
```

Uninstall Print Connector

1. Find Kofax iManage Print Connector on the list of installed program in Control Panel > Programs and Features.
2. Select it and right-click, and then click Uninstall.

Note: The Print Connector must be uninstalled while Copitrak Desktop is still installed. If Copitrak Desktop is uninstalled first, the Print Connector cannot be removed.

Configure Print Connector

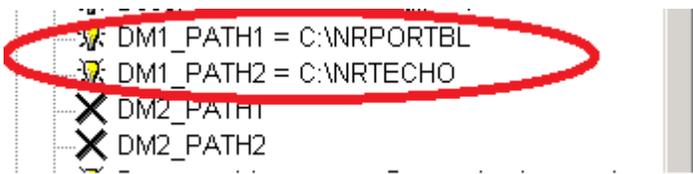
Required Files:

Imantools.exe
Interop.Imanage.dll

1. Open Config File Manager and select DMS Intergration.
2. Set DM System Type as “Imantools”.
Set Field Pickups accordingly as per the sample screen below.
Set Account to “B-C” or according to the fields used in the above step.

Field	DM System Type	Field	Account
A	Imantools	User	<input type="checkbox"/>
B		Account	<input checked="" type="checkbox"/>
C		Lawyer	<input type="checkbox"/>
D		General	
E		Description	
F		Document	
G			
H			
I			
J			

3. Select Detailed View in Config File Manager.
4. Set DM1 and DM2 Path accordingly.
DM1_PATH1=C:\NRPORTBL
DM1_PATH2=C:\NRTECHO



Example LT2005_Settings.ini section:

```
[AUTOVALIDATION]
DocumentManagementSystem1=IMANTOOLS
DM1_PATH1=C:\NRPORTBL
DM1_PATH2=C:\NRTECHO
FormulaBType=D
FormulaBField=Client
FormulaCType=D
FormulaCField=Matter
AccountFormula=B-C
```

Notes: When you launch Copitrak Desktop, it automatically copies Imantools to the local installation folder of the user as Itiman0.exe when using DM1 System, or Itiman1.exe when using DM2 System. Imantools must always be configured as DM1 System.

Debugging:

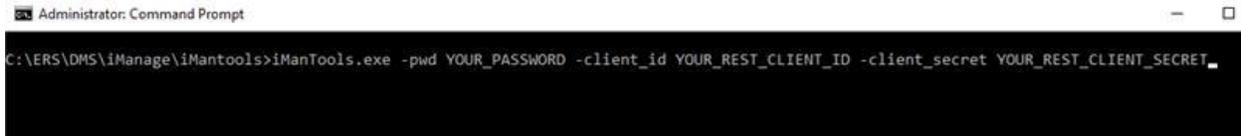
The following files are included with the Copitrak Desktop package in Debug for Imantools folder:

- Imantools.exe (debugging only version)
 - log4net.dll
 - LTIMAN.EXE.config
1. To enable debugging, copy the above files to the local Copitrak Desktop install folder on the user PC.
 2. Rename Imantools.exe to LTIMAN0.exe and rename config file to "LTIMAN0.EXE.config".
A log file is written to the DATA folder of Copitrak Desktop.

4. Configure REST API

To use the REST API instead of COM API, rest_client_id and rest_client_secret are required in both imanhelper and imantools configurations. Ignore_ssl key is set to true if iManage server uses self-signed or otherwise, invalid certificates with https– without ignore_ssl, the connection to the server is not established.

To set rest_client_id, rest_client_secret and password keys in configuration files, run imantools.exe:



```
Administrator: Command Prompt
C:\ERS\DMS\iManage\iMantools>iManTools.exe -pwd YOUR_PASSWORD -client_id YOUR_REST_CLIENT_ID -client_secret YOUR_REST_CLIENT_SECRET
```

This command encrypts the values passed to it and writes them to `imantools.exe.config`. Copy these values to `imanhelper.dll.config`.

5. Scanning Modes

iManage Scan Connector has the following modes:

- Workspace mode
- My matters mode
- Flatspace mode

The scan workflow proceeds as follows: pick client-matter, pick database, workspace, folder (and subfolder if applicable), document type (and subtype if applicable), author, (any other custom fields), then file description. The steps of picking workspace and folders are different across the configuration modes. See relevant sections for details on each mode.

At each stage, results can be filtered by typing into the text box on the right. Results are displayed 8 at a time, and you can switch between pages of results using the left and right arrows at the top of the list. The arrows are shown as white when you can move forward/backward.

Workspace Mode

Workspace mode has the following workspace selector values = !2 or !2-00.

In Workspace mode, workspaces matching the supplied client-matter account are displayed. Choosing different client-matter accounts results in different workspaces being displayed. Workspaces can be filtered by name.

There are different configurations for displaying folders:

- Top-level directories mode (folder and subfolder selectors = !3-1, !3-3): folders are selected similarly to browsing through a file system. Top-level directories are shown, and if a folder is selected that has subfolders, then that folder is expanded to show its subfolders. Folder results can also be filtered by name at any step in the process.

Note: Make sure that `imantools.exe.config` `WorkFolder` value is pointing to the general field of !3-3 (Usually General 6).

- All directories mode (folder and subfolder selectors = !3, X): there is no browsing through folders to get to subfolders – every folder is displayed initially. Top-level folders are displayed as their name, and all subfolders are displayed as <parent name>\<child name>. Selecting a folder that has subfolders does not expand it to show subfolders, but selecting any folder is the final decision for where to scan the document.

Note: Make sure that imantools.exe.config WorkFolder value is pointing to the general field of !3 (Usually General 5).

My Matters Mode

My Matters mode (workspace selector = !2-1)

In My Matters mode, workspaces that a user has added to “my matters” through iManage are displayed. The workspaces can be directly in “my matters”, or can be inside categories (which can themselves be directly in “my matters”, or inside other categories). Categories and workspaces cannot have documents saved to them, but workspaces contain folders, which can be saved to. A user’s “my matters” container is held on one database, so database selection does not matter for this mode. In fact, “my matters” just stores shortcuts to workspaces, and these shortcuts can link to different databases.

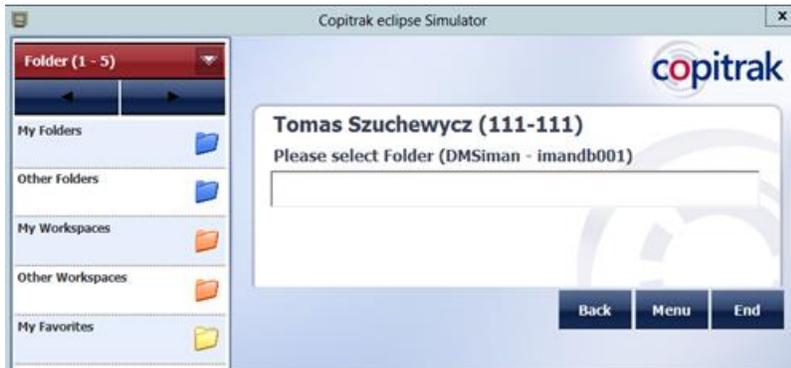
For folder display, My Matters mode has two submodes: top-level directories mode and All directories mode. See [Workspace Mode](#) for a description of the two modes.

Flatspace Mode

Flat Space mode (workspace selector = !2-2). You can see the selector values for the general fields in the Scantrak configuration below.

General Field	Picklist Source	Description
General3	!1	Database Selection
General4	!2-2	Flatspace (prompt is auto skipped since result list always contains 1 item)
General5	!3-1	Folder Selection (in Flatspace mode this list always contains 3 results) 
General6	!3-3	Folder Selection (this prompt displays all available folders from previous selected location) **If worklist is selected, it indicates to profile to Document Worklist in iManage and auto skips this prompt.
General7	!4-00	Document Class (this displays a picklist of all the available Classes that can be used on the Document profile).

When Scantrak is configured, you can log in and see the different selections as shown below.



“My Folders” shows a list of folders whose owner is the currently logged-in user.

“Other Folders” shows a list of folders whose owner is not the currently logged-in user.

“My Workspaces” shows a list of workspaces whose owner is the currently logged-in user.

“Other Workspaces” shows a list of workspaces whose owner is not the currently logged-in user.

“My Favorites” contains categories, workspace shortcuts, and folder shortcuts that have been added to the currently logged-in user’s “My Favorites” in iManage. My Favorites just holds shortcuts, so you cannot scan directly to it, but you can scan to folders that have been added to My Favorites.

Note: Flat space mode initially shows a hard-coded list of containers, which cannot be filtered.

Top-level directories mode

Top-level directories mode (folder, subfolder selectors = !3-1, !3-3)

Note: Make sure that imantools.exe.config WorkFolder value is pointing to the general field of !3-3 (Usually General 6).

My/Other Folders

My/Other Folders mode shows the folders owned by the user (would be not owned by the user for Other Folders). Results are displayed as <workspace>\<folder> in order to disambiguate between top-level folders with the same name in different workspaces (and since iManage workspace and folder creation can be done using templates, this is a likely scenario). Browsing through folders is the same as in other modes – clicking a folder with subfolder expands the folder to show its subfolders.

My/Other Workspaces

This workflow is the same as “workspace mode”, except that instead of showing workspaces matching client-matter, workspaces matching/not matching the current user are shown. Selecting workspaces expands them to show their folders, and selecting folders with subfolders expands them to show subfolders.

All directories mode

All Directories mode (folder, subfolder selectors = !3-1, !3-2)

Note: Make sure that imantools.exe.config WorkFolder value is pointing to the general field of !3-2 (Usually General 6).

My/Other Folders

All folders and their subfolders are displayed, provided the owner is/is not the logged-in user. Top-level folders are shown as <workspace>\<folder>, and subfolders are shown as <parent>\<child>. Selecting a folder is final; there is no file system-like browsing in this mode.

My/Other Workspaces

For every workspace whose owner is/is not the logged-in user, all folders and subfolders are displayed. Top-level folders are shown as <workspace>\<folder>, and subfolders are shown as <parent>\<child>. Selecting a folder is final; there is no file system-like browsing in this mode.