

Kofax Copitrak

LEAP Connector Installation Guide

Version: 1.1.0

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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 slight shadow effect on the right side of the letters, giving it a three-dimensional appearance.

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1. Installation

The Kofax Copitrak LEAP Connector is a tool to upload billing files to the [LEAP Legal system](#) through the cloud client. You can also use the tool to download a Matter list.

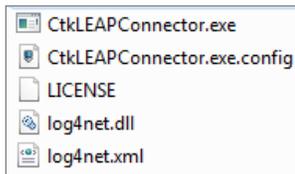
The tool can be used by the Equitrac EP5 or Copitrak CSS700 Cost Recovery Systems.

1.1 Prerequisites

- The Copitrak LEAP Connector requires **Microsoft .NET Framework 4.5** to be installed.
To download: <http://www.microsoft.com/en-ca/download/details.aspx?id=30653>
- LEAP Cloud Client software

1.2 Install LEAP Connector

An installation file (.msi, .exe) is not used. Begin by extracting the ZIP file (CtkLEAPConnector_n.n.nn.n.zip) into the preferred location, such as C:\CtkLeap. When extracted, the files are similar to the following list.



1. Launch the installer on the system where Copitrak Server is already installed. Follow the prompts and update the destination folder if necessary. Default destination folder: C:\Program Files (x86)\Kofax\Copitrak\LEAP Connector Service\
2. To install in silent mode, run the following command from an administrator Command Prompt window: `msiexec /i Copitrak-LEAP-ConnectorService-[version].msi /qn`

When the LEAP Connector is installed successfully, the connector appears in **Control Panel > Programs and Features** as **Kofax Copitrak LEAP Connector Service**.

1.3 Uninstall LEAP Connector

1. In **Control Panel > Programs and Features**, select **Kofax Copitrak LEAP Connector Service**.
2. Right-click and select **Uninstall**.

1.4 Configure CtkLeapConnector.exe.config

Application Settings section:

```
<applicationSettings>
  <Copitrak.LEAP.CtkLEAPConnector>
    <setting name="DataPath" serializeAs="String">
      <value>C:\CtkLEAP\Data</value>
    </setting>
    <setting name="MattersFile" serializeAs="String">
      <value>C:\CtkLEAP\Data\Matters.txt</value>
    </setting>
    <setting name="LeapAPIKey" serializeAs="String">
      <value>d9b9f342-629a-468e-a433-1e159879ba14</value>
    </setting>
    <setting name="LeapMattersUrl" serializeAs="String">
      <value>https://api-liveb.leapaws.com.au/4daction/api/matter/list.json?current=true</value>
    </setting>
    <setting name="LeapCostRecoveryUrl" serializeAs="String">
      <value>https://api-liveb.leapaws.com.au/4dACTION/API/recovery/list.json</value>
    </setting>
    <setting name="LeapPOSTChunkSize" serializeAs="String">
      <value>250</value>
    </setting>
    <setting name="LeapPOSTRetries" serializeAs="String">
      <value>3</value>
    </setting>
    <setting name="LeapPOSTRetriesInterval" serializeAs="String">
      <value>30</value>
    </setting>
  </Copitrak.LEAP.CtkLEAPConnector>
</applicationSettings>
```

Setting	Description	Default Value
<setting name="DataPath" serializeAs="String">	Sets the location of the Data folder and creates the following subfolders: <ul style="list-style-type: none"> Archive Config In Processing 	C:\CtkLEAP\Data
<setting name="MattersFile" serializeAs="String">	Sets the path and given name for the file containing Matter (Accounts) information.	C:\CtkLEAP\Data\Matters\Matters.txt
<setting name="LeapAPIKey" serializeAs="String">	Supplied by LEAP.	The default supplied in the .xml file is for the LEAP live test servers, and may differ for a live environment.
<setting name="LeapMattersUrl" serializeAs="String">	Supplied by LEAP.	The default supplied in the .xml file is only for the LEAP live test servers, and for testing purposes only.
<setting name="LeapCostRecoveryUrl" serializeAs="String">	Supplied by LEAP.	The default supplied in the .xml file is intended for LEAP live test servers, and for testing purposes only.
<setting name="LeapPOSTChunkSize" serializeAs="String">	Uploading Data package (records) size	250
<setting name="LeapPOSTRetries" serializeAs="String">	Number of attempts to transmit data when a communication problem occurs.	3

Setting	Description	Default Value
<code><setting name="LeapPOSTRetriesInterval" serializeAs="String"></code>	Time between retries, in seconds	30
<code><add key="PollIntervallInSeconds" value="3600"/></code>	Time interval for partial sync in seconds. If the value is 3600, LEAP downloads and syncs the updated and deleted matter list every 3600 seconds.	
<code><add key="FullSyncPollIntervallInHours" value="24"/></code>	Time interval for full sync in hours. If the value is 24, LEAP downloads and syncs the complete list every 24 hours.	
<code><add key="FullSyncStartTime" value="02:00am"/></code>	Determines when full sync occurs.	
<code><add key="FullSyncMatterDTSX" value="FullSyncDTSX"/></code>	Specifies the name of complete list dtsx file.	
<code><add key="UpdateMatterDTSX" value="UpdateDTSX"/></code>	Specifies the name of updated list dtsx file.	
<code><add key="DeleteMatterDTSX" value="DeleteDTSX"/></code>	Specifies the name of deleted list dtsx file.	
<code><add key="ImporterTimeOutInSeconds" value="90"/></code>	Timeout limit for importer to run. If the value is 90, importer has 90 seconds to complete execution.	

1.5 Logging Information section

```

<log4net>
  <appender name="LogFileAppender" type="log4net.Appender.RollingFileAppender">
    <param name="File" value="C:\CtkLEAP\Data\CtkLEAPConnector_" />
    <param name="AppendToFile" value="false" />
    <param name="RollingStyle" value="Date" />
    <param name="StaticLogFileName" value="false" />
    <datePattern value="yyyy-MM-dd_hh-mm-ss'.log'" />
    <layout type="log4net.Layout.PatternLayout">
      <param name="ConversionPattern" value="%d %-5p %c [%x] - %m%n" />
    </layout>
  </appender>

  <root>
    <level value="INFO" />
    <appender-ref ref="LogFileAppender" />
  </root>
</log4net>

```

Setting	Description	Default Value
param name="File"	Enter the complete file path, followed by the desired file name ending with an underscore, but no extension	C:\CtkLEAP\Data\Debug\CtkLEAPConnector_
param name="RollingStyle"	New Log file will get created based on Date	Date
param name="StaticLogFileName"	Specifies if Log file name is always the same or not True: Same Log File False: New file	False
datePattern	New Log file will get created with following date format (yyyy-MM-dd_hh-mm-ss) appended to filename specified in "File" setting. Example: CtkLEAPConnector__2014-06-27_01-24-03.log	_yyyy-MM-dd_hh-mm-ss'.log'
param name="ConversionPattern"	Default Log4Net value	%d %-5p %c [%x] - %m%n
level value=	Debug Level. Possible values: OFF ERROR INFO DEBUG ALL	INFO

2. Running CtkLEAPConnector

CtkLEAPConnector.exe has three (3) command line switches:

```
/CREDS
/GETMATTERS
/POSTTRANS
```

1. Go to the following path: C:\Program Files (x86)\Kofax\Copitrak\LEAP Connector Service
2. Double-click LeapConnectorCP to start the Leap Connector. Enter the credentials and click Sign In.

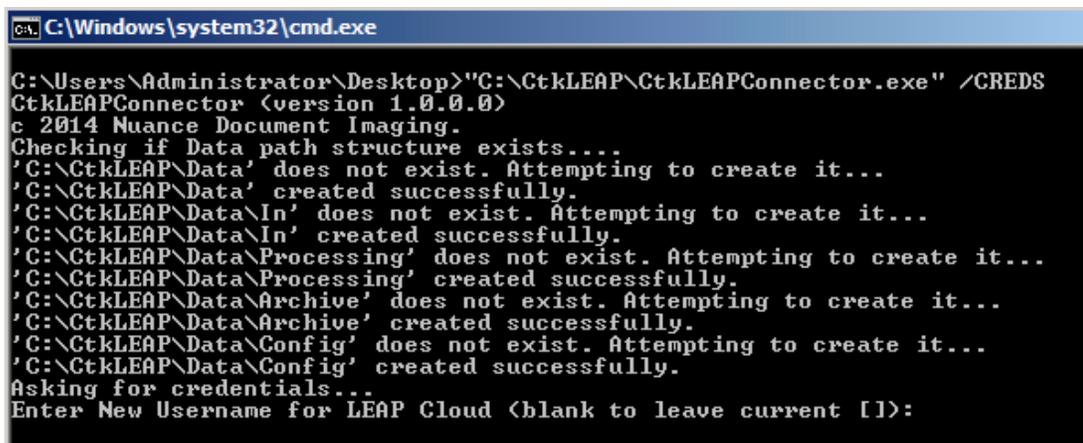
Note: To manually trigger Full Sync, you have two options. The first option is to go to path: \ProgramData\Kofax\Copitrak\LeapConnector, and delete the file MatterParameters.txt. The second option is to edit the file to have content: lastRowVersion-0. This allows Full Sync to occur at the next partial sync update.

The log files for Leap Connector are created in the following path:
C:\ProgramData\Kofax\Copitrak\LeapConnector\LogFiles

2.1 CtkLEAPConnector.exe /CREDS

- a. Creates the Data folder (in location specified for **DataPath** in CtkLEAPConnector.exe.config), and also creates the subfolders **Archive**, **Config**, **In**, and **Processing**.
- b. Once Data folders are created, you are prompted for LEAP credentials (username and password).

Important: You must run this command line switch the first time before anything else, to set LEAP credentials. Credentials are saved to \Data\Config\credentials.xml, and are subsequently read from that location. Whenever LEAP credentials change for any reason, you must run the program again with the same command line switch, to enter new credentials.



```
C:\Windows\system32\cmd.exe
C:\Users\Administrator\Desktop>"C:\CtkLEAP\CtkLEAPConnector.exe" /CREDS
CtkLEAPConnector (version 1.0.0.0)
© 2014 Nuance Document Imaging.
Checking if Data path structure exists....
'C:\CtkLEAP\Data' does not exist. Attempting to create it...
'C:\CtkLEAP\Data' created successfully.
'C:\CtkLEAP\Data\In' does not exist. Attempting to create it...
'C:\CtkLEAP\Data\In' created successfully.
'C:\CtkLEAP\Data\Processing' does not exist. Attempting to create it...
'C:\CtkLEAP\Data\Processing' created successfully.
'C:\CtkLEAP\Data\Archive' does not exist. Attempting to create it...
'C:\CtkLEAP\Data\Archive' created successfully.
'C:\CtkLEAP\Data\Config' does not exist. Attempting to create it...
'C:\CtkLEAP\Data\Config' created successfully.
Asking for credentials...
Enter New Username for LEAP Cloud (blank to leave current []):
```

2.2 CtkLEAPConnector.exe /GETMATTERS

- a. Use to get Matters from the LEAP Cloud, and output them to the specified file for MattersFile in CtkLEAPConnector.exe.config.
- b. The output file is comma delimited, with fields enclosed in double quotation marks (.csv file), in the following order:
 “no”, “cli”, “des”, “oth”, “sta”, “sts”

See the following table.

Field	Type	Description
no	String	Matter Number
cli	String	Name of the client associated with the Matter
des	String	Description of the matter
oth	String	Other side
sta	String	State
stf	String	Staff associated
sts	String	Status of the matter

Billing File Specifications

Set the billing system to output the billing files to the **\Data\In** folder that was created previously. The files **must** be in .csv file format, which is comma-delimited with fields enclosed in double quotation marks. The field order **must** be as follows:

“importedExternalID”, “matterNo”, “amountExTax”, “taskCode”, “quantity”, “recoveryType”, “taxCode”, “description”, “date”

Where:

Object Name	Data Type	Example	Compulsory	Notes
importedExternalID	String	5175	False	Cost Recovery unique ID from client system. Sending this will ensure no duplicate items are saved. IMPORTANT: This field’s functionality will only be available in version 2 of the LEAP API, but the field must still be included in the billing file. This field will not actually be uploaded to LEAP, but by still Including it in the billing file, means that no change will be necessary to the billing file once version 2 of the LEAP API is released. If this field can’t be provided in the billing file, just output a

Object Name	Data Type	Example	Compulsory	Notes
				blank ("") field in the billing file.
matterNo	String	000001	True	Matter Number
amountExTax	Number	99.91	True	The total amount of all items. NOTE: Individual item= amountExTax/quantity.
taskCode	String	PHO	False	Must correspond one of the firms Cost Recovery/Fee Task Codes (depending on RecoveryType below).
Quantity	Number	1	False	If null assumed to be 1.
recoveryType	String	CR F	False	If null then assumed to be "CR" (Cost Recovery). Otherwise pass "F" (Fee)
taxCode	String	GST	False	Must correspond to one of the firm's Tax Codes; otherwise derived from Task Code; otherwise assumed to be the firm's GST Tax Code.
description	String	Photocopying	False	If null then the default description from Task Code otherwise "Imported {date/time}."
Date	String	2014-04-28	False	Transaction date in (ISO format: YYYY-MM-DD). If null then the current date

Possible Task Codes:

Code	Description
af	Agent fees
afa	Agent fees - Filing Appearance
afc	Agent fees - Filing State of Claim
afcs	Agent fees - Filing Change of Solicitor
afd	Agent fee - Filing Statement of Defence
afo	Agent fee - Entry of Order
afp	Agent fees - Filing Praecipe
afw	Agent fees - Filing Writ of Summons
barr	Barrister fees
bf	Bank fee
cour	Courier
dr	Doctor Fee
exp	Express Post
fax	Facsimile
fman	Secure File Retention & Destruction Service (7 years)

Code	Description
itsf	InfoTrack search fee
lte	Long distance telephone call
misc	Miscellaneous
new	Lodgement of newspaper advert
park	Parking fees
parking	Parking
pho	Photocopies
po	Postage
pr	Pest Report
rem	Reimbursement
sund	Sundries
taxi	Taxi

Possible Tax Codes:

Field	Description
FRE	GST Free
GST	Goods & Services Tax
N-T	Not Reportable

2.3 CtkLEAPConnector.exe /POSTTRANS

Use to post transactions to the LEAP Cloud. By running with this command line switch, the following occurs:

1. Files in **\Data\In** are moved to **\Data\Processing** and the date and time are added to the file names to make them unique.
2. Files are read from **\Data\Processing** and posted to the LEAP Cloud.
3. If the upload fails, the file that failed and the last record that was successfully uploaded (if any) are logged to **\Data\Processing\ImportsLog.xml**. The next time the program runs to post transactions, it will check **ImportsLog.xml** for any files that failed to upload, and try to upload them again. Once that is done, it uploads any new files that were moved to **\Data\Processing**.
4. When uploads are successful, the files are moved from **\Data\Processing** to the **\Data\Archive** folder, and any references to the files in **\Data\Processing\ImportsLog.xml** are deleted.