

Kofax Info Mail

Configuration Guide

Version: 7.9

Date: 2020-11-27

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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Preface

Kofax Info Mail™ is an additional component for Kofax Process Director Accounts Payable™. It allows vendors to easily and quickly check the status of their invoices with buyers using Process Director Accounts Payable, via email.

Info Mail works as follows:

1. The vendor sends an email to a specified email account.
2. Info Mail receives the email and requests the relevant information from Process Director Accounts Payable.
3. Info Mail sends an email to the vendor containing a summary of the status of the invoices.
4. The vendor can click on links in the email to retrieve more detailed information about particular invoices.

About this guide

Info Mail is highly customizable. This guide is for people who install Info Mail for Process Director Accounts Payable and want to configure it to suit the needs of an organization. The guide explains all the settings and configuration options for Info Mail.

You must have in-depth knowledge of Process Director Accounts Payable to use this guide.

Chapter 1

Deployment

This chapter explains how to deploy Info Mail.

System requirements

See the *Process Director Web Application Technical Specifications* guide, which lists:

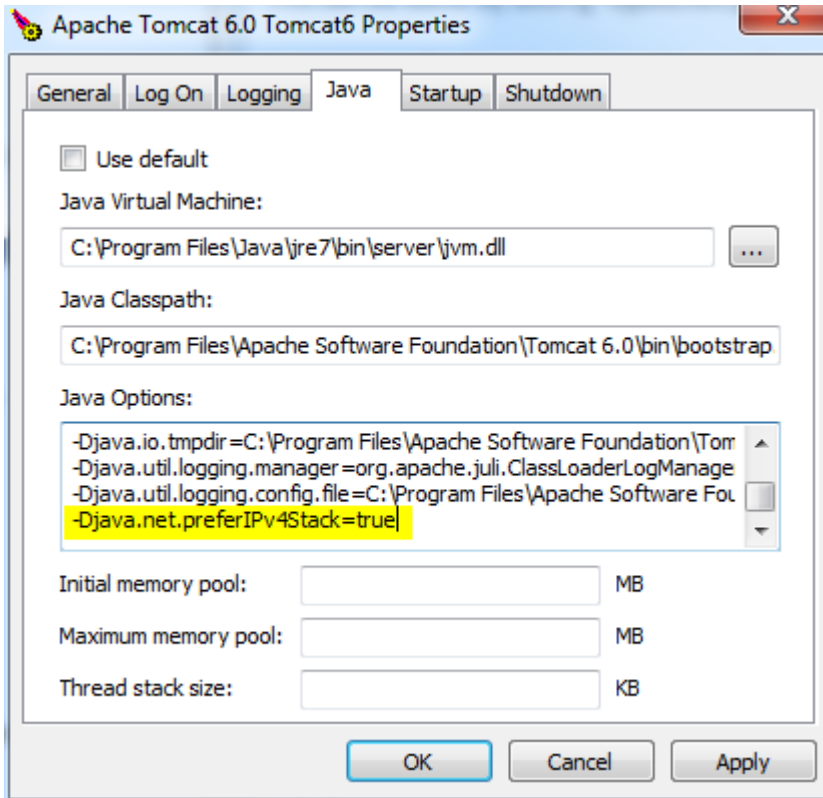
- Hardware requirements
- Software requirements
- Tested environments

Note If you use JCo3 and deploy Info Mail together with the Process Director Web Application or other web applications such as Kofax Email-based Approval™, you must move the jcolayer library to the Tomcat main library folder and remove it from all Web Application library folders. See the *Process Director Web Application Technical Specifications* document for more information.

Installation files

The installation files are sent as ZIP files and are password protected (to ensure they are not blocked by email server protection filters). The password is **readsoft**.

When running Info Mail on a Java 7 VM, add the `-Djava.net.preferIPv4Stack=true` property to the JVM startup parameters:



Chapter 2

Configuration overview

Info Mail settings are specified in different files:

- Info Mail Web Application settings files
- `webapps\infomail-app\WEB-INF\web.xml`

To change these settings, you can either edit these files or use the Info Mail Web Application. Changes you make using the Web Application are saved to the respective settings file.

Chapter 3

Web Application settings

This chapter describes the Info Mail Web Application settings.

General settings

The following general settings are available.

Schedule

File: scheduler.xml

Directory: ..\WEB-INF\conf\

Web: Schedule tab

Info Mail can operate on a schedule of your choice. The schedule is configured in the scheduler.xml file.

Set up the schedule

The first things you must determine are the days and times the Info Mail Web Application runs:

1. Log in to the Info Mail web page.
2. Select the **Schedule** tab.

3. You have three options:

- To continuously run Info Mail, select the **Permanently** option.

- To run Info Mail every day, but only during the time you specify, select the **Every day** option.

- To run Info Mail only on the days and times you specify, select the **Selected days of the week** option.

For all options, you must specify the **Interval** of how often Info Mail checks for new email.

Parameters

File: settings.properties

Directory: \WEB-INF\conf\

Web: **Parameters** tab > **Parameters configuration**

This file contains the main configuration settings for the Info Mail application. It can be found in the \WEB-INF\conf\ directory of the Web Application or in the external configuration directory of your specification.

Configuration settings

Setting	Valid values	Description
config.filename.logwriter		The path to the log settings file.

Setting	Valid values	Description
<code>config.filename.mimetypes</code>		The path to the MIME types settings file. It lists the supported MIME types.
<code>config.filename.sap</code>		The path to the SAP server and logon settings file.

General settings

Setting	Valid values	Description
<code>general.directory.languagefiles</code>		The path where statistic message templates are saved.
<code>general.statistics</code>	true/false	Set to true to record statistics.
<code>general.timeslice.minutes</code>	Positive integer	The time between checking for new email and the sending of the email response.
<code>general.reply.error.codes</code>		A list of SAP error codes that you wish to display to users. Valid format: <code>/COCKPIT/<error code 1>;/COCKPIT/<error code 2></code> Example: <code>/COCKPIT/WC.133;/COCKPIT/WC.22</code> If SAP returns one of these error codes, an email containing the error message is sent to the user.

Mail settings

Setting	Valid values	Description
<code>mail.pop3.folder</code> <code>mail.imap.folder</code>		The name of the folder that MOBILE APPROVAL checks for incoming messages. For example, INBOX.
<code>mail.pop3.host</code> <code>mail.imap.host</code>		Name of the POP3/IMAP server.
<code>mail.pop3.password</code> <code>mail.imap.password</code>		Password for the POP3/IMAP account.
<code>mail.pop3.port</code> <code>mail.imap.port</code>		Port number of the POP3/IMAP server.
<code>mail.pop3.socketFactory.class</code>		Optional. Specifies the name of the class that implements the <code>javax.net.SocketFactory</code> interface. This class is used to create POP3 sockets. <code>javax.net.ssl.SSLSocketFactory</code> can be used.
<code>mail.pop3.socketFactory.fallback</code>	true/false	
<code>mail.pop3.socketFactory.port</code>		The port to use when using the specified socket factory. If left blank, the default port will be used.

Setting	Valid values	Description
mail.pop3.user mail.imap.user		User name for the POP3/IMAP account.
mail.pop3.user.address mail.imap.user.address		The email address of the user for the POP3/IMAP account.
mail.smtp.auth	true/false	Set to true to allow only authorized email to be sent.
mail.smtp.from		The email address that appears in the From field for emails sent to suppliers by Info Mail.
mail.smtp.host		Name of the SMTP server.
mail.smtp.password		Password for the SMTP account.
mail.smtp.port		Port number of the SMTP server.
mail.smtp.socketFactory.class		Optional. Specifies the name of the class that implements the <code>javax.net.SocketFactory</code> interface. This class is then used to create SMTP sockets. <code>javax.net.ssl.SSLSocketFactory</code> can be used.
mail.smtp.socketFactory.fallback	true/false	
mail.smtp.socketFactory.port		The port to use when using the specified socket factory. If left blank, the default port will be used.
mail.smtp.starttls.enable	true/false	

Mail logging settings

There are five different kinds of log emails that Info Mail can send, depending on the type of event:

- Administration
- Application closing
- Errors
- Information
- Warnings

For each type you specify:

- Whether an email is sent when the event type occurs.
- The email subject and the text that appears at the start of every email, before the content of the logs.

Setting	Valid values	Description
maillogger.admin.mailaddress		The email address of the Info Mail administrator.
maillogger.from.mailaddress	Name <email address>	The name and email address that appears in the From field for log emails. Example: Info Mail Logs <name@company.com>

Setting	Valid values	Description
maillogger.logwindow	on/off	Turns Log Window feature on or off. If the Log Window feature is turned on, all available log information is written in the current system log window. If Info Mail is running as a Windows NT service you must use the Services control panel to modify the logging service and enable the Allow interaction of service and desktop setting by using the Services control panel.
maillogger.message.admin.send	true/false	Enables or disables administration log emails
maillogger.message.admin.subject		The subject for administration emails.
maillogger.message.admin.text		The text that appears at the start of every administration email, before the content of the logs.
maillogger.message.close.send	true/false	Set to true if application closing log emails will be sent.
maillogger.message.close.subject		The subject for application closing emails.
maillogger.message.close.text		The text that appears at the start of every application closing email, before the content of the logs.
maillogger.message.error.send	true/false	Set to true if error log emails will be sent.
maillogger.message.error.subject		The subject for error emails.
maillogger.message.error.text		The text that appears at the start of every error email, before the content of the logs.
maillogger.message.info.send	true/false	Set to true if information log emails will be sent.
maillogger.message.info.subject		The subject for information emails.
maillogger.message.info.text		The text that appears at the start of every information email, before the content of the logs.
maillogger.message.warning.send	true/false	Set to true if warning log emails will be sent.
maillogger.message.warning.subject		The subject for warning emails.
maillogger.message.warning.text		The text that appears at the start of every warning email, before the content of the logs.

SAP settings

Setting	Valid values	Description
sap.logon.system		The SAP system that Info Mail connects to. Note Further SAP system settings are saved in the <code>saplogon.properties</code> file.
sap.rfc.value.flag.delete		The RFC function sets a delete flag in its export parameter and if this value matches <code>sap.rfc.value.flag.delete</code> , the email will be deleted without sending any information to the sender.

Statistics settings

Setting	Valid values	Description
statistics.language	ISO 639-2 language code	The language of the statistic emails. For example, a value of DE for German sets the use of <code>wcconfig\WEB-INF\conf\lang\statisticMessage_de.txt</code>
statistics.mail.addresses.from	Name <email address>	The name and email address that appears in the From field for statistic emails. Example: Info Mail Statistics <name@company.com>
statistics.mail.addresses.to		The email address of the receiver.
statistics.mail.subject		The subject of the email.
statistics.send.every	hour, day, month, year	The frequency of sending statistic emails. You can use one or more values. Multiple values must be separated by a semicolon. Example: hour;day
statistics.tempfiles.dictionary		The directory where temporary statistic files are saved.

Verifier (spam) settings

Use these settings to filter out spam email, so that Info Mail only processes incoming email from authentic suppliers.

Setting	Valid values	Description
verifier.blacklist	true/false	Set to true to enable the use of a blacklist (list maintained in runtime object)
verifier.blacklist.resettime.hours		Time (in hours) until blacklist object is cleared
verifier.blacklist.resettime.maxmails		This defines the maximum number of emails that a user can send to MOBILE APPROVAL within the time set in <code>verifier.blacklist.resettime.hours</code>

Setting	Valid values	Description
<code>verifier.blacklist.resettime.minutes</code>		The time interval, in minutes, to reset the blacklist
<code>verifier.maxmailsize.bytes</code> (Optional setting)	Positive integer	Optional. The maximum size (in bytes per email) of emails allowed by Info Mail. Emails greater than the amount specified here will not be processed. Example: 524288. (0.5 Megabytes).
<code>verifier.regex.subject</code> (Optional setting)		Optional regular expression. This expression will be evaluated on each subject line and if matched, the mail will be ignored. Only one regular expression string is allowed. Note In the configuration file the backslash symbol (\) outside of the character string must be set as \\ Example: <code>.\ \ **SPAM.\ \ **</code>
<code>verifier.timeslice.maxmails</code> (Optional setting)	Positive integer	The maximum number of emails that Info Mail is allowed to process with the time limit. If the number exceeds this amount, Info Mail will close. By default, the time limit is determined by the <code>general.timeslice.minutes</code> parameter or from the Scheduler if it has been set.

SAP logon settings

File: `saplogon.properties`

Directory: `\WEB-INF\conf\`

Web: **Parameters** tab > **Saplogon properties**

Info Mail can be used for one or more SAP systems. For every system it connects to, you must enter the following settings in the `saplogon.properties` file. You cannot initially enter these settings using the Info Mail Web Application, but you can change them later using it.

Setting	Valid values	Description
<code><SAPID>.activate</code>	yes/no	Set to yes to enable the connection to the SAP system. If set to no, the connection is disabled and all other settings are ignored.
<code><SAPID>.ashost</code>		The host of the SAP application server.
<code><SAPID>.client</code>		The SAP logon client.
<code><SAPID>.sysnr</code>		The three-digit system number for SAP.

Setting	Valid values	Description
<SAPID>.lang	ISO 639-2 language code	The language of the SAP system.
<SAPID>.maxconnections		The maximum number of simultaneous connections allowed.
<SAPID>.user		The logon username for SAP.
<SAPID>.passwd		The logon password for SAP.

Connect to a message server

1. To connect to an SAP message server instead of directly to the application server, substitute <SAPID>.msghost for <SAPID>.ashost.
2. Specify the server group using the <SAPID>.group setting.

Example:

```
<SAPID>.msghost=10.1.5.113
<SAPID>.group=WORKGROUPNAME
```

Connect to similar systems

You can connect to systems that differ only in the SAP logon client <SAPID>.client and/or SAP system number (<SAPID>.sysnr). To do so, complete the following steps.

1. Use the <SAPID>.system setting to specify the SAP ID.
2. Add the SAP logon client to the SAP ID that precedes the settings.

Example:

Specifying two systems that differ only in their client number:

```
DR1-0.system=DR1
DR1-0.client=0
DR1-800.system=DR1
DR1-800.client=800
```

All other settings for these systems must then be preceded with either DR1-0 or DR-800, as appropriate.

Statistics messages

Filename

You can create one statistics message template per language. The filename must follow the format:

```
statisticMessage_<language>.txt
```

where <language> is the ISO 639-2 language code, for example, en, de. The statisticMessage.txt file is used when no language is specified in the `statistics.language` setting.

Location

By default, statistic message templates are saved in the `\WEB-INF\conf\lang` folder. This location can be changed using the `statistics.tempfiles.dictionary` setting.

Encoding

All files must be saved in UTF-8.

Content

The content is a mixture of regular text and variables. The content can be changed either by editing the file or by using the Info Mail Web Application (**Parameters** tab > **Statistics message** > **<Language>**).

Comments

All lines starting with a hash sign # are treated as comments and are not included in the email.

Email subject

The first line of the file that does not start with # is used as the email subject.

Variables

All variables start and end with the percentage character, %.

Variable	Description
<code>%date_from()%, %date_to()%</code>	Specifies the date the statistics start and end. The date format can be specified inside the brackets, and must conform to <code>java.text.SimpleDateFormat</code> (see http://java.sun.com/j2se/1.5.0/docs/api/java/text/SimpleDateFormat.html). The brackets may include clear text. These must be enclosed by single quotation marks ' '. Example: <code>%date_from(dd.MM.yyyy 'at' HH:mm:ss)%</code>
<code>%statistics_type()%</code>	
<code>%mails_received()%</code>	The number of emails received by Info Mail.
<code>%sap_system_calls%</code>	The number of SAP system calls.
<code>%mails_blocked()%</code>	The number of emails blocked.
<code>%block_reason_subject()%</code>	The number of emails blocked due to their subject.
<code>%block_reason_blacklist()%</code>	The number of emails blocked because the sender was on the blacklist.
<code>%block_reason_mailsize()%</code>	The number of emails blocked because they were too large.
<code>%block_reason_rfc_return()%</code>	
<code>%list_begin%</code> and <code>%list_end%</code>	Denotes the start and end of the list of statistics for each email address. It can contain one or more of the variables below.
<code>%list_mailaddress%</code>	The email address for the list element.
<code>%list_received()%</code>	The number of emails received for the list element.

Variable	Description
<code>%list_sent()%</code>	The number of email sent for the list element.
<code>%list_blocked()%</code>	The number of blocked emails for the list element.

Formatting the variables

The format of the variables can usually be changed by including formatting instructions within the brackets. For all amount variables, you can specify the number of digits and the preceding character. For example:

Example variable	Result
<code>%mails_received()%</code>	168
<code>%mails_received(5;)%</code>	168 [Note the two spaces in front of the three-digit number.]
<code>%mails_received(2;)%</code>	168 [Note that the number is not cut because it is longer than 2 digits.]
<code>%mails_received(5;0)%</code>	00168
<code>%mails_received(10;-)%</code>	-----168

Log files

Filename

`wctrc.YYYY.MM.DD.log`

By default, a new log file is created for each day. This can be changed using the `dailyFile` setting.

Location

By default, log files are saved in the Tomcat `\logs\infomail-app` folder. This can be changed using the `logDir` setting. Log file settings can only be changed in the `config.filename.logwriter` file in the Info Mail `\WEB-INF\conf` folder.

Content

The content of every log entry is:

```
[Date]<Sep>Time<Sep>[Host<Sep>] [Application<Sep>] SessionID<Sep>Level<Sep>Message
```

All items in square brackets `[]` are optional. If the message is WARNING, ERROR or FATAL, it is preceded by an error number.

You can customize the filename, location and content of the log files using the settings below.

Setting	Valid values	Description
level	0 (Off) 1 (Fatal) 2 (Error) 3 (Warning – default) 4 (Info) 5 (Debug)	Determines the content of the log files. Only log messages lower or equal to the setting are written to the log.
logDir		The path where log files are saved. If the path is not absolute, it is relative to the Tomcat application server's path. Default: Info Mail creates an <code>infomail#app</code> folder in the log directory of the Tomcat application server.
logName		The name of the log files. Use <code>%date%</code> to include the current date in the filename. Default: <code>wctrace.%date%.log</code>
Separator		The character that separates columns in the log files. Default: ;
dateFormat	Must conform to <code>java.text.SimpleDateFormat</code>	The format of the date in the log files. Default: <code>dd.MM.yyyy</code>
timeFormat	Must conform to <code>java.text.SimpleDateFormat</code>	The format of the time in the log files. Default: <code>hh.mm.ss.SSS</code>
host		The hostname of the application server. Specifying <code>%host%</code> will insert the hostname from the HTTP request. Default: (Empty)
appName		The name of the application. Default: (Empty)
showDate	yes/no	Display or hide the date in the log. Default: yes
dailyFile	yes/no	Yes generates a new log file every day. No uses only one log file. Note If using <code>yes</code> , <code>logName</code> must contain <code>%date%</code> , otherwise a daily log file will not be created.

HTML title

Filename

`tiles-defs.xml`

Location

The Info Mail \WEB-INF\ folder.

Content

This file contains the page names for the different Info Mail menu items. You should only change the `appTitle` setting. This determines the HTML `<TITLE>` tag. If it is left blank, `INFO MAIL` is used.

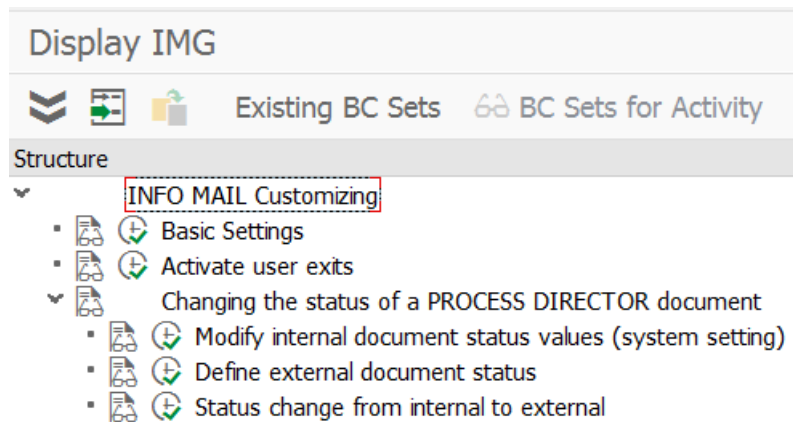
Chapter 4

Info Mail settings inside SAP

There are a number of Info Mail settings that you configure within SAP. These settings relate to the searching of vendors and their invoices, document status definitions, as well as the content of the emails sent to vendors.

Open the IMG

To open the Info Mail IMG, go to the `/COCKPIT/II` transaction.



Basic settings

Basic Settings

IM active

Vendor selection

Determine vendor via email address
 Non-unique vendor email allowed


Vendor number in email subject
 Own account number in email subject


Search period (days)


Invoice date in email subject
 Purchase order number in email subj
 Invoice search period (days)

E-mail with invoice information to vendors

Default language

Invoice not found 
 Subject

Multiple invoices 
 Subject

Single invoice found 
 Subject

Invoice image as email attachment

Basic Settings

Setting	Description
IM active	Activates the Info Mail service.

Vendor selection

At least one of the following settings must be selected. They determine how Info Mail determines the vendor from the email it sends to the Info Mail service.

Setting	Description
Determine vendor via email address	Determines the vendor from the email address of the sender.
Vendor number in email subject	Determines the vendor from the vendor's number within the email.

Setting	Description
Own account number in email subject	Determines the vendor from the vendor's account number (EIKTO) contained within the email.

Search period (days)

Once the vendor has been identified, Info Mail searches the database for its invoices, using the settings below:

Setting	Description
Invoice date in email subject	If specified in the email, Info Mail searches for invoices using the given document dates.
Purchase order number in email subject	If specified in the email, Info Mail searches for invoices using the given purchase order numbers.
Invoice search period (days)	How far back in time Info Mail searches for invoices. The time is measured using the document creation date in Process Director Accounts Payable. If set to 0, the filter is disabled and the entire database is searched.

E-mail with invoice information to vendors



Setting	Description
Invoice not found	The path to the email template that is used for emails stating there were no invoices found.
Multiple invoices	The path to the email template that is used for emails listing more than one invoice.
Single invoice found	The path to the email template that is used for emails listing only one invoice.
Invoice image as email attachment	If only one invoice is found, this setting can be used to attach an image of the invoice to the reply email.

Examples

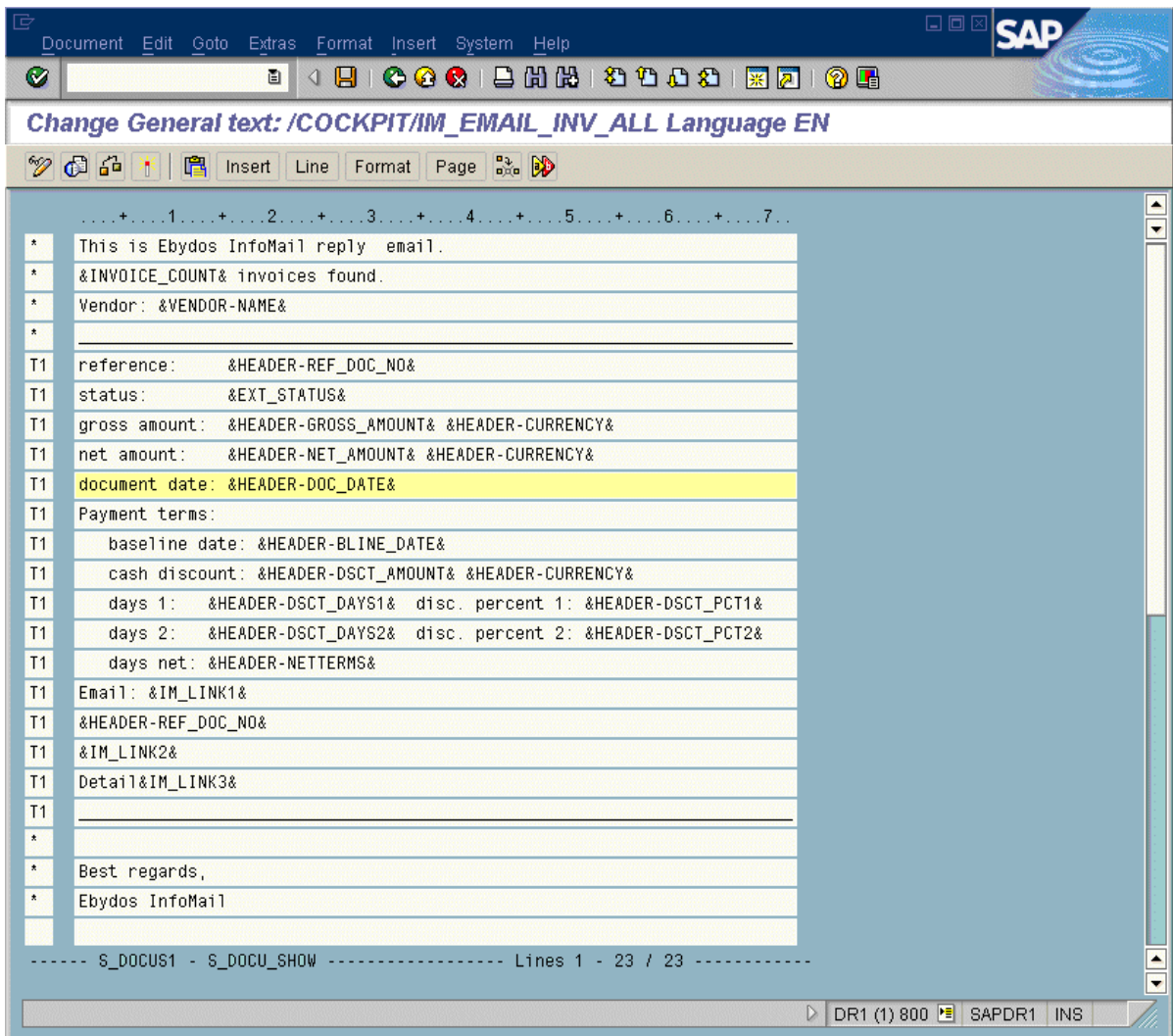
Email subject	Result
LIFNR=13;EIKTO=1234;DOC_DATE=20080201; PO_NUMBER=4500000000;REF_DOC_NO=I IU7M8J J1 1I	The vendor and invoice will be searched according to these search criteria, if they are enabled.
I IU7M8J J1 1I	If the subject is only one string, it is treated as a REF_DOC_NO.
[No subject]	All invoices in the system belonging to the vendor will be returned. The sender's email address is used to search the vendor list.

Edit email content

You can customize the content of each of the three [result email templates](#).

1. To open the template, under **E-mail with invoice information to vendors**, click the **Change text**  button.
2. To edit the template, in the Document Maintenance window, click the **Change**  button.
3. Edit the template, as required

You can use either plain text or HTML.



As you can see in this screenshot, there are different variables that you can use:

The column on the left shows whether the text in the line should be repeated for every invoice found (**T1**) or displayed only once in the email (*).

In this example, the ACTION, NAME and PHONE fields are added to the list of supported Info Mail fields.

You then call this user exit in the /COCKPIT/RFC_IM_CUSTOMIZ_GET function to add the fields to the ET_FIELD_VALUES table. For example:

```
*>>> INSERT
* User exit 702 - enable user definable keywords
  CALL FUNCTION '/COCKPIT/Z_USEX_IM_KEYWORDS'
    EXPORTING
      i_exittype      = con_exit_infomail_keywords
    IMPORTING
      e_fname        = lc_function
    EXCEPTIONS
      OTHERS          = 1.
  IF sy-subrc EQ 0.
    CALL FUNCTION lc_function
      TABLES
        it_field_values      = et_field_values.
  ENDIF.
*<<< INSERT
```

Changing the status of a Kofax Process Director document

Modify internal document status values

Display View "Internal document status": Overview

Internal status	Description
01	Unprocessed
02	Errors
03	Posted
04	Deleted
05	Partially posted
06	Workflow non-posted document
08	Workflow posted document
09	Paid
10	Collective invoice complete
11	Collective invoice incomplete
13	Rejected
23	Parked
24	Blocked for Payment
25	Dynamic Discounting
B1	Created, not submitted

Position... Entry 1 of 15

Define external document status

New Entries: Overview of Added Entries

External status	Description
E1	In work
E2	Processed
E3	Payed

Position... Entry 1 of 3

Status change from internal to external

Display View "Changing document status from PD to external": Overview

Int status	Status description	Ext status	Status description
------------	--------------------	------------	--------------------

Position... Entry 0 of 0

Chapter 5

Email servers

Supported protocols

Info Mail requires an email account that can be accessed using POP3 or IMAP. It does not support the MAPI protocol used by Microsoft Exchange.

SSL settings

Some email servers only accept SSL connections using a valid certificate. You can specify this certificate information using the following parameters for Java Virtual Machine.

Parameter	Description
<code>javax.net.ssl.trustStore</code>	The path to the file that contains the KeyStore object used by the default TrustManager.
<code>javax.net.ssl.trustStorePassword</code>	The password for the KeyStore object used by the default TrustManager.
<code>javax.net.ssl.trustStoreType</code>	The type of KeyStore object used by the default TrustManager.
<code>javax.net.ssl.keyStore</code>	The path to the file that contains the KeyStore object used by the default KeyManager.
<code>javax.net.ssl.keyStorePassword</code>	The password for the KeyStore object used by the default KeyManager.
<code>javax.net.ssl.keyStoreType</code>	The type of KeyStore object used by the default KeyManager.

The parameters can be specified using one of two methods:

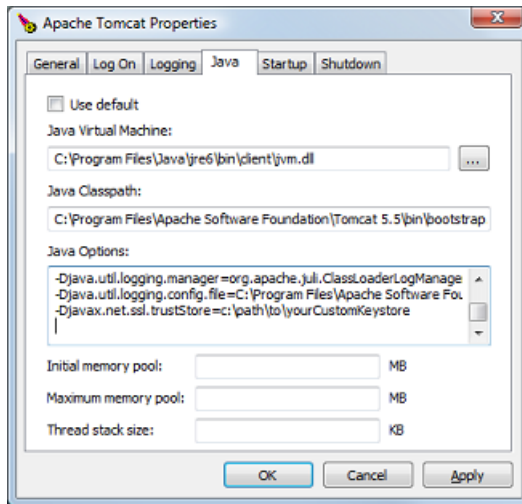
- In the Apache Tomcat Properties dialog. See [Apache Tomcat](#).
- In the `settings.properties` file. See [settings.properties](#).

Apache Tomcat

1. Start the **Configure Tomcat** application.

It can be started from the Windows Start Menu or by running `tomcat5w.exe` in the Tomcat bin directory.

2. Enter the SSL parameters in the **Java Options** box on the **Java** tab.
You must include the `-D` option before each entry (this is the Java option to specify environment properties.)



settings.properties

Enter the Java environment property=value pairs in the Info Mail `settings.properties` file.

Example

```
javax.net.ssl.trustStore=c:\path\to\yourCustomKeystore
```

Note Do not add the `-D` Java option before each entry.

Appendix A

Plug-ins

Configuration

Plug-in configuration is set both in the Web Application and SAP.

Web Application configuration

```
<init-param>
  <param-name>plugin1</param-name>
  <param-value>com.readsoft.ebydos.plugin.Plugin</param-value>
</init-param>
```

- Param-name must be plugin plus the number of the plugin.
- Param-value must be the full plugin name.
- The plugin class must implement two methods, one for initialization and one for running.
- Plugin classes must be copied to the `WEB-INF/lib` directory. The properties file name must be the same as the plugin name set in the parameters with a `.properties` extension. This properties file must be in the `web-app/conf` directory.
- When plugins are set, the plugins are executed instead of Info Mail functionality.

Initialization method

The initialization method can implement one of two possible interfaces:

- `public void init(SAPLogonBean logonBean, Log log, Properties props)`
throws Exception : this method will be called on init web app and on initializing web app and on start
- `public void init(SAPLogonBean logonBean, Log log, Properties props, Hashtable propsTable)`
throws Exception : this method will be called on init web app and on initializing web app on start.

Parameter `propsTable` has additional properties files that are in `conf` dir and name is as plugin name plus some string and extension as properties.

Key in `propsTable` is substring of file name on the disk, for example for file

`com.ebydos.cockpit.infomail.TestJobPlugin.mimetypes.properties`, the key will be `mimetypes.properties`

Running method

`public void run()` throws Exception: this method is run periodically according to the scheduler.