



Kofax Equitrac

SafeCom to ControlSuite Migration Setup Guide

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SafeCom to ControlSuite migration overview

SafeCom customers migrating to ControlSuite will likely find Equitrac as the most analogous product to their existing deployment. This guide aims to aid customers by facilitating the migration from SafeCom to Equitrac. After purchasing Equitrac/ControlSuite, the general steps required to migrate include:

1. Install and license Equitrac.
2. Use the SafeCom User Migration Tool to export user data from SafeCom and import that information into Equitrac.
3. Configure devices and deploy embedded clients.
4. Configure optional features such as, business rules, billing accounts, quotas, cost profiles, etc.

Installation

Equitrac installation occurs through the ControlSuite Installation Assistant. Equitrac has different components that are generally installed on different servers depending on server function, though single-server deployments are perfectly acceptable for low-volume applications. Contact your vendor or Kofax Sales Engineer for assistance determining the optimum deployment architecture for your situation.

See the [ControlSuite Web help](#) for assistance [Install Equitrac in a production environment](#).

Licensing

Equitrac is licensed through the ControlSuite Configuration Assistant, which can be launched immediately after installation or separately at a later time. The software must be licensed before it can be fully configured and used. See the help topic on [Licensing ControlSuite](#) for instructions on how to create an account at the Kofax Customer Portal and license your software.

SafeCom user migration tools

To simplify the process of migrating from SafeCom to Equitrac, Kofax has created a set of new tools to aid in the export and import of user data from SafeCom to Equitrac.

These tools, SafeComExport and SafeComImport, are Windows console applications. The SafeComExport tool can be copied to any Windows operating system to export SafeCom data while the SafeComImport tool can only be run on the server on which it was installed.

About the SafeComExport tool

- Supported SafeCom versions: G4 (all hotfixes and point releases).
- SafeCom supports the following database engines: SQL Server and SQL Express, versions 2008 R2, 2012, 2014, 2016, with the latest service packs (by default SafeCom is installed with SQL Express 2014). The SafeComExport application supports the same environment.
- The exported file contains all data that can be migrated. The users' PIN codes are stored in encrypted form, so they cannot be stolen from the XML file.
- The SafeComExport tool is automatically installed with Equitrac CAS. There is no additional action required in the ControlSuite installer.
- After installation the SafeComExport tool can be found here: `... \Equitrac \Tools \SafeComExport.exe`
- The SafeComExport console application must be run on the server where the main SafeCom Service (`scSafeComService64.exe`) is running.
- The user running the application must have Windows registry read access (specifically to the HKLM section) and must also have write access to the folder they specify to which the export file will be saved.
- If the SafeCom database is configured for Windows authentication, the user running the SafeComExport application requires read access rights to the database.

SafeComExport.exe command-line arguments

```
SafeComExport.exe --output-file <filepath> [--windows-auth | --sql-auth --sql-username <username> --sql-password <password>] [--log-file <filepath>]
```

```
SafeComExport.exe -o <filepath> [-w | -s -u <username> -p <password>] [-l <filepath>]
```

- '--output-file <filepath>' or '-o <filepath>' parameter:
 - Mandatory parameter to specify the path and filename for the exported file. If the file path contains special characters or whitespace, include the filename in double quote ("...") characters.
 - The file should not already exist at that path, and the user running the application should have write access to the path.
- '--windows-auth' or '-w' parameter:
 - Optional parameter to override the default authentication parameter for the SafeCom database. It is not recommended for use in most cases. Contact Support for assistance with this option.

- '--sql-auth' or '-s' parameter:
 - Optional parameter to override the default authentication parameter for the SafeCom database. It is not recommended for use in most cases. Contact Support for assistance with this option.
 - '--sql-username <username>' or '-u <username>' parameter:
 - Parameter to set a SQL username to connect to the SafeCom database and for use only when the '--sql-auth' parameter has been specified. Contact Support for assistance with this parameter.
 - '--sql-password <password>' or '-p <password>' parameter:
 - Parameter to set a SQL user password to connect to the SafeCom database and for use only when the '--sql-auth' parameter has been specified. Contact Support for assistance with this parameter.
- '--log-file <filepath>' or '-l <filepath>' parameter:
 - Optional parameter to enable logging. Recommended for use only when troubleshooting export issues.

About the SafeComImport tool

- The SafeComImport tool is automatically installed with Equitrac CAS. There is no additional action required in the ControlSuite installer.
- After installation the SafeComImport application can be found here: *... \Equitrac \Tools \SafeComImport.exe*.
- Prior to running the SafeComImport tool, Equitrac's CAS must be running on the same server and be properly enrolled in the ControlSuite security architecture.
- The user running the application is authenticated. Only users in Equitrac's 'Admin' or 'Accounts' groups are allowed to perform the import operation.
- When data is imported into Equitrac, by default only new data is imported. Previously existing records are not updated to avoid accidentally changing existing data. The migration tool can be started in a forced update mode which will result in previously existing records being overwritten.
- When a SafeCom entity is converted to an Equitrac entity, default values are used for fields that do not have a direct mapping from one product to the other. These default values are the same as those defaults used when a new entity is created in Equitrac without using the import tool.

The following table shows the SafeCom user information that can be exported and how it maps to Equitrac fields:

SafeCom field	Equitrac field
Username (or User Logon)	User ID (or Account Name)
Full Name	Full Name
Email Address	Email Address
ID Codes	Primary PIN (or PIN1)
ID Codes	Alternate PIN
PinCode	Secondary PIN

SafeCom field	Equitrac field
Description	Description
Locked	Locked
Balances (Account1, Account2)	Balances (Paid, Allotted)
Delegates	Delegates
Organization Unit	Department

SafeComImport.exe command-line arguments

SafeComImport.exe --input-file <filepath> [--force-update] [--log-file <filepath>] SafeComImport.exe -i <filepath> [-f] [-l <filepath>]

- ‘--input-file <filepath>’ or ‘-i <filepath>’ parameter:
 - Mandatory parameter to specify filename and path where the input file can be located. If the file path contains special characters or whitespace, include the file path in double quote (“...”) characters.
 - The file should exist at that path, and the user running the migration tool should have read access to that file.
- ‘--force-update’ or ‘-f’ parameter:
 - Optional parameter to force updates to existing records. By default, the migration operation only adds new records to Equitrac, already existing records are not updated.
 - If specified, existing data is overwritten during the import.
 - The balances of the existing users are not updated.
- ‘--log-file <filepath>’ or ‘-l <filepath>’ parameter:
 - Optional parameter to enable logging. Recommended only when troubleshooting import issues.

Migrating users using the SafeComExport and SafeComImport tools

The general steps to migrate SafeCom users are:

- Copy the SafeComExport application onto the server where the main SafeCom Service (scSafeComService64.exe) is running. All SafeCom G4 versions are supported.
- Export all data from SafeCom into an external file using the SafeComExport console application. A sample command-line to export the user information would be:

SafeComExport.exe -o C:\temp\SafeComUserExport.xml

- Place the exported file in a location that is accessible from the server where Equitrac CAS (Core Accounting Service) is installed.
- Import data from the exported file into Equitrac using the SafeComImport console application which is automatically installed alongside CAS. A sample command-line to import the user information would be:

SafeComImport.exe -i C:\temp\SafeComUserExport.xml

- Review and manually update the imported data if necessary

Configure Equitrac

Like SafeCom, Equitrac requires additional configuration steps beyond user setup, such as configuration of devices, embedded clients, rules and routing, quotas, etc. Many of these steps are optional and will only be completed if called for in a specific deployment. The [Kofax ControlSuite help](#) contains information on full Equitrac setup and configuration. Contact your partner or Kofax Sales Engineer or Professional Services analyst for assistance with your specific deployment.