

Kofax Copitrak

CSS700 Technical Deployment – Express Edition

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The logo for KOFAX, consisting of the word "KOFAX" in a bold, blue, sans-serif font.

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Copitrak System Software

The Copitrak System Software (CSS) solutions provide enterprise-wide cost recovery, scan, and print management solutions to support multiple offices in a highly distributed, scalable, and optimized network. CSS uses industry standards, such as SQL database and Crystal Reports, to offer complete and open functionality in the work environment.

This document provides guidelines for the procurement and setup of Microsoft servers for deploying Copitrak's CSS Express version (CSS Express Host) of their CSS System and covers operating system, hardware, and software licensing requirements.

Included in the Copitrak Enterprise License – CSS Premium Host

The CSS Express Host (CSS-XH) server license for enterprise customers includes licensing for the following items:

- One core accounting server for the main office
- Five attached Eclipse/Edge terminals or Embedded Terminals, which can grow to 24 terminals
- An unlimited number of Web Reports users (based on OS and CAL availability)
- One user license of Copitrak's Web Disbursements

Copitrak licensing options

CSS700 Server includes the ability to add licenses for additional servers and solutions:

- CSS Premium Feed for Large Offices (CSS-PF) – required for each remote office with more than 5 terminals connecting to a Premium Host
- CSS Premium Feed for Small Offices (CSS-PFSO) – required for each remote office with a maximum of 5 terminals connecting to a Premium Host
- Scan to Document Management System
- Scan OCR Services
- GFI Imports – cost per setup of each import template
- Workstation/Release Station Print clients – 1, 10, 50, 100, 500, 1000 Print Client packs
- Copitrak Phone licenses for main office and remote office feeds
- Embedded terminals for Ricoh, Canon, HP, Xerox EIP, and Lexmark, eCopy
- Third-party transaction imports and Time & Billing integration

Additional customer software license requirements

For a CSS installation, the customer is required to have the following server licenses:

- Microsoft Windows Server License
- Microsoft SQL Server License

Customer responsibilities

For a CSS server installation, the customer is responsible for the following items:

- Set up and configure the Windows Server and SQL Server (with the latest Microsoft service pack and security patches)
- Provide Copitrak with reliable remote access to the server to install and configure the CSS software
- A disaster recovery plan for the CSS Server and associated SQL Server
- Routine backup and maintenance of the Copitrak System Server
- Routine backup and maintenance of the SQL database

Virtual environments

Operating systems installed to virtual machines must have the specified physical resources dedicated to the virtual machines hosting the CSS Server.

Deployment on the Cloud

Kofax recognizes that some customers want to use Cloud platforms - such as Azure, Amazon Web Services, and Google Cloud - to deploy applications and services that will be provided to their on-premise network using a site-to-site VPN or leased line. With this network topology, the infrastructure and services held in the Cloud are considered an extension of the customer's private, on-premise network and normal TCP/IP operations can occur.

Assuming these network conditions are met, it can be assumed that deploying Copitrak onto a Cloud platform will function as expected with no notable differences from an on-premise deployment and will be supported as such. Please note that all other prerequisites for the given solution, such as underlying operating systems and hardware specification, must be adhered to.

If a specific issue, for instance, print release/Follow-You Printing/scan workflow which usually requires steady network bandwidth and low latency, arises as a result of Copitrak being deployed onto a Cloud platform, then the customer may be requested to move all components back to a traditional, on-premise deployment.

Additional server requirements, considerations, and limitations

- All minimum requirements specified are intended for physical servers or virtual machines dedicated to host a Copitrak CSS installation
- No other services, applications, or roles should be installed on the CSS Server
- The CSS Server cannot be installed on a domain controller, DHCP, DNS, Mail, file share server, and so on.
- CSS Server's IP address must be a static address
- CSS Server's host name cannot include an underscore character
- If installing anti-virus software on the CSS Server, configure the software to exclude the Copitrak folder
- A dedicated domain user account or, if in a workgroup, a local user account must be provided as a Copitrak service account
- The account is required to be a member of the local Administrators group on the computer where CSS is to be installed.
- The assigned administrator account requires that the user properties "Password never expires" is enabled.
- For installation and maintenance of the Copitrak SQL database, an SA account that has db_owner rights is required
- Copitrak CSS Server does not support Windows Integrated Authentication for connection to its SQL database

CSS Server hardware requirements

Software Platforms	Minimum Hardware Requirements
Cost Recovery Requirements	
<ul style="list-style-type: none"> • Windows Server 2016 (64-bit, with IIS 10.0 and .NET 4.6) • Windows Server 2012 R2 (64-bit, with IIS 8.0 and .NET 4.5) • Windows Server 2012 (64-bit, with IIS 8.0 and .NET 4.5) • Windows 10 Professional • Windows 8.1 • Windows 7 	<p>Minimum:</p> <ul style="list-style-type: none"> • Processor: Intel I5, 2.7 GHz (or equivalent) • RAM: 4 GB or greater • Hard disk space: 100 GB free hard disk space dedicated for Copitrak solution • Display: 1024x768 resolution <p>Note: These minimum specifications are only a reference for clients providing old hardware with fresh OS for cost recovery (that is, no scanning and no print release).</p> <p>Recommended:</p> <ul style="list-style-type: none"> • Processor: Intel I7 – 4-cores (or equivalent), 2.8 GHz or greater • RAM: 8 GB or greater • Hard disk space: 100 GB free hard disk space dedicated for Copitrak solution • Display: 1024x768 resolution • Microsoft Windows Desktop OS's, all editions support a limit of 20 concurrent connections for services such as File Services, Print Services, IIS, and Internet Connect Sharing.
SQL Server Requirements	
<ul style="list-style-type: none"> • Microsoft SQL Server 2017 (or Express) • Microsoft SQL Server 2016 (or Express) • Microsoft SQL Server 2014 (or Express) • Microsoft SQL Server 2012 (or Express) 	<p>It is recommended that for large enterprise firms, the SQL database server should reside on a separate physical server.</p> <p>See notes on SQL Servers.</p>
Scan Processing and MyVault (Secure Print) Processing Requirements	
<p>Adding additional CPU cores will yield higher performance with high volume scanning and print release.</p> <p>Additional scan servers can be added to improve scan processing and OCR performance. Any additional server should match the CSS server specified with scan.</p> <p>It is recommended that remote offices be configured with their own scan server to improve scan performance and reduce network loading.</p>	<p>Moderate scan and secure print processing require:</p> <ul style="list-style-type: none"> • Processor: 4 additional cores • RAM: an additional 8 GB or greater (16 GB or greater total) • Hard disk space: Scanning and MyVault Storage requirements are directly dependent on the number and size of the stored documents and should be assessed on a customer by customer basis.

Please note that if the system underperforms due to hardware limitations, then migrating to a new server hardware complying with the recommended hardware specifications is a

must and it will be a chargeable engagement for Professional Services. Additional hardware resources or additional servers may be required for the following:

- High volume scanning and scan processing (OCR and compression) will require additional CPU, memory resources, and disk capacity
- High volume print release with MyVault may require higher performance hardware with additional CPU cores, memory, and disk capacity.
- To reduce WAN network traffic and reduce loading on the central CSS Server, local Copitrak Scan and MyVault servers are recommended for individual (remote) offices. All cost recovery data may be stored on a centralized CSS Server
- Additional hard disk space as needed if the Copitrak SQL database will be hosted on the CSS server

Hard disk and SQL database system requirements

Approximately 50 GBs of hard disk space is required for OS and Copitrak System Software installation.

The SQL Server for the CSS database may be installed on the CSS Server or on a separate dedicated SQL Server that hosts other databases. It is recommended that for large enterprise firms, the SQL database server should reside on a separate physical server.

Windows SQL Server Express should only be used for small firms with less than 100 users as the database size is limited. Microsoft SQL Server Express version have maximum database sizes: 10 GB per database for SQL Server 2017, SQL Server 2016, SQL Server 2014, SQL Server 2012. The limit applies per database (log files excluded).

It is the responsibility of the firm to provision adequate server disk space and hardware to support Copitrak’s database requirements.

It is the responsibility of the firm to provide database maintenance and backup procedures for the SQL server and the Copitrak database.

For rough calculations of disk space requirements, use the data in the following table. The numbers are based on actual customer data for a one-year period. The numbers of bytes per transaction are averages and vary slightly based on the type of transaction, that is, copy, phone, fax, or print.

Users	Accounts	Transactions (1 year)	Raw Files (Total)	Bytes Per Transaction (EXR files)	Average Bytes Per Transaction (SQL)	SQL Database Storage Requirements
500	57,000	779,000	275 M Bytes	360 Bytes	1,200 Bytes	1 GB
1000	77,000	1,300,000	448 M Bytes	360 Bytes	1,500 Bytes	2 GB

Ports used by CSS Server

If firewalls are enabled, the following ports must be open for both inbound and outbound network traffic.

ERS server ports

- 23 LCWIN Telnet Port (LCWIN Telnet logging port)
- 25 LCWIN Status Email Port (LCWIN E-Mail notification port)
- 3539 CSS License Manager Port (License Manager communication port: LCWIN, DFI, Scantrak_2010, ScantrakOCRService, and BillingInterfaceG2)
- 4140 LCWIN main port from client firmware to host. This port can be changed.
- 4141 LCWIN client communication port: terminals, Copittrak Desktop
- 4142 = eclipse terminals
- 4143 = Copittrak Print/Copittrak Desktop Status Port
- 4144 = Copittrak Print Room Status Port and Copittrak Scan Status Port (conflict if both run on the same PC)
- 4145 = MY VAULT Server Port – Standard XML File Reply

Copittrak web applications

- Port 80 HTTP Web applications
- Port 443 HTTPS Web applications

Client apps

- Port 25 smtp.exe (configurable)
- Port 2929 STKRemoteApp (configurable)
- Port 10007 Embedded Terminal Debug logger port

CTKMailService

- Port 25 for sending email notifications (configurable)
- For retrieving email from servers:
 - Port 110 Pop (configurable)
 - Port 143 Imap (configurable)

Exchange OWA

- Port 80 for HTTP
- Port 443 for SSL/HTTPS

Note on Port 0 usage: Port 0 is not a valid port for traffic. Network management tools may report that you've got traffic headed there, however, that's not what the packets contain. Port 0 is often used by these tools as a placeholder to mean "no L4 header".

Copitrak has seen this reported for Copitrak's Diamond terminals where ports 4140 and 4141 are used.

Reference: <http://www.lovelymytool.com/blog/2013/08/the-strange-history-of-port-0-byjimmacleod.html>