

Kofax Copitrak

Installation 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 'K' and 'F' are particularly prominent due to their complex shapes and the bold styling.

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Table of Contents

Overview	2
Related documentation	2
Prerequisites	3
Install .NET for Windows Server 2012	5
Install SQL Server Express 2014 with Tools	5
Installing Copitrak	7
Extract the Copitrak installation files	8
Install Copitrak.....	8
Configure ERS.NET	9
Add license	10
Applying service packs	10
Back up the Copitrak Scan Engine.....	10
Back up the Copitrak Desktop client	11
Install Service Pack SP002.17	11
Revert the Scan Engine	12
Update the Copitrak Desktop client.....	12
Stop the RAWMon service	12

Overview

This guide describes the preparation and installation steps for Kofax Copitrak.

This guide also covers the prerequisites for installing Copitrak, including checklists and detailed instructions or notes about the steps.

Related documentation

The full documentation set for Copitrak is available at the following location.

https://docshield.kofax.com/Portal/Products/en_US/Copitrak/3.0.16-2z8rg6dfv3/Copitrak.htm

In addition to this guide, the documentation set includes the following items:

- *Kofax Copitrak Desktop Installation and Configuration Guide*
- *Kofax Copitrak Configuration Guide*
- *Kofax Copitrak Technical Deployment for the Express and Premium editions*
- *License Manager Technical Note*
- *Canon Embedded Installation and Configuration Guide*
- *Document Retrieval Service (DRS) Technical Note*

Prerequisites

- Verify that your system meets the server hardware requirements in the Technical Deployment document.
- The Copitrak VM must have enough resources (RAM, CPUs, cores, and HDD) allocated to it to meet or exceed the minimum hardware specifications. Failure to do so will result in poor performance.
- Confirm the state of the Windows Firewall via the Control Panel. If it is not turned off for domain networks, then the required TCP and UPD ports must be opened. This applies equally to any network/hardware-based firewall. The following ports must be open:

Incoming Ports	
4140	Main port from Client Firmware to LCWIN Host. Can be changed.
Outgoing Ports	
4141	Diamond/Pro Host Programming Port
4142	eClipse Status Port (Formatted HTML Reply)
4143	Copitrak Print/Copitrak Desktop Status Port
4144	Copitrak Print Room and Scan Status Port
4145	My Vault Server Status Port (Standard XML Reply)

- For server identification purposes, the Copitrak server IP address cannot change and must be set to a static value or have an address permanently leased from DHCP. The server hostname must not contain the underscore (“_”) character.
- Whether the Copitrak service account is a domain or local account, it must be a member of the server’s Administrators permissions group. It should also meet the following requirements:
 - The password must not contain an ampersand symbol (“&”)
 - The password should never expire
 - The password should not be changed on first login
 - The password cannot be changed by user
 - Account has “run as a service” privileges
 - Group Policy must allow the account full local administrator privileges, not only for the proper operation of Copitrak but also for SQL Server (See the following Microsoft technotes: [ms813696](#), [ms813959](#), and [ms813847](#).)
- The Copitrak server must be dedicated to Copitrak, with no other non-Copitrak-related software, nor use of other server roles, including but not limited to DHCP,

- DNS, mail, FTP, file sharing, and so on. Some configurations of Copitrak may require these roles, but they cannot be used for purposes other than Copitrak. The Copitrak server cannot be a domain controller.
- Copitrak requires .NET 3.5.1 and 4.5. It is recommended that you install .NET with any Windows updates before you begin to install Copitrak. If .NET is not installed manually using the **Server Manager Add Roles** feature, the Copitrak installer tries to add the required .NET features during installation, but this is not the preferred method. See [Install .NET for Windows Server 2012](#).
 - A Windows update should have been performed as part of the server setup, and another update performed shortly before the Copitrak installation. If one or more roles or features were installed in the previous step, then multiple updates might be necessary. Confirm that all Windows updates are applied, and the server is restarted prior to continuing with the installation.
 - The ERS directory is the root folder for all Copitrak-related files. If the folder name was customized (not recommended for a new installation), then the correct path can be verified by looking in the winers.ini file.
 - Copitrak can be installed to any drive but this guide assumes a server with a single drive (such as C:\ERS). You can substitute the correct drive letter as required.
 - Create the folder C:\ERS, then create another folder within it named **Install**. In the **Install** folder, create another folder named **Install_Downloads**, and within it, create three folders: **Copitrak**, **Service Packs**, and **SQL Express**.
 - Download the Copitrak installer and save it to the C:\ERS\Install\Install_Downloads\Copitrak folder. Download the latest version of Copitrak from <https://delivery.kofax.com>.
 - The Complete Package includes the main installation software, hot fixes, and documentation.
 - The Server Software 700R2 only includes the main installation software.
 - Note the current service package (hotfixes) is available separately.
 - Once downloaded, go to the Properties dialog of the installer and check to see if there is a security note at the bottom. If so, click **Unblock**. Failure to do so will result in a corrupted installation which requires a server wipe to resolve.
 - The latest service pack for Copitrak is available at <https://delivery.kofax.com>. Download the service pack and save it to the C:\ERS\Install\Install_Downloads\Service Pack folder. Once downloaded, go to the Properties dialog of the service pack installer and check to see if there is a security note at the bottom. If so, click **Unblock**. Failure to do so will result in a corrupted installation which requires a server wipe to resolve.
 - Copitrak works with either a locally installed copy of Microsoft SQL Server or SQL Server Express, or a copy of Microsoft SQL Server hosted elsewhere on this

network. If working with SQL Server, add the Copitrak service account to SQL Server with database creating rights. This guide assumes a local installation of SQL Server Express on the Copitrak server.

- Copitrak works with SQL versions 2008, 2012, or 2014. The installation should include SQL Server Management Studio. Download SQL Express from <https://delivery.kofax.com>. Save the SQL installer to the C:\ERS\Install\Install_Downloads\SQL folder.
- With the server verified, updated, and with the software downloaded, back up the server or take a snapshot to preserve the current state of the server in case you need to return to this clean state.
- Install SQL and SQL Server Management Studio. See [Install SQL Server Express 2014 with Tools](#).

Install .NET for Windows Server 2012

To install .NET 3.5 and 4.5 on a Windows 2012 Server, complete the following steps:

1. Launch the Server Manager and select the **Add Roles and Features** option from the Manage menu in the top-right. Click **Next** until you reach the **Features** screen.
2. Select all **.NET 3.5** check boxes. Accept any notification that other features need to be activated too. Confirm that the first two **.NET 4.5** check boxes are selected.
3. Click **Next** and continue through the Wizard to install the role and features. Note that your IT department might need to provide a path to the .NET 3.5.1 resource location.
4. If you are using a Windows 2008 server, you can use the previous steps to install .NET 3.5 (some screens will differ). To install .NET 4.5, you must download it from the Microsoft site and install it separately. Verify if .NET 4.5 is already installed on the Control Panel installed applications list.

Install SQL Server Express 2014 with Tools

To install SQL Server Express 2014 with Tools, complete the following steps:

1. Launch the SQL Server installer and proceed through the initial dialogs and checks. The only acceptable warning is for the Windows Firewall. All other issues should be resolved before proceeding.
2. Click **Next** to move to the Feature Selection screen.
3. Clear the **SQL Server Replication** option and **SQL Reporting** option (if available). Click **Next**.
4. Leave the Instance Configuration screen untouched and click **Next**.
5. In the Server Configuration screen, change the **Startup Type** to **Automatic**. Click **Next**.

6. Click on the **Collation** tab. Verify that the Database Engine is set to a case-insensitive configuration.
 7. In the Database Engine Configuration screen, change the **Authentication Mode** to **Mixed Mode** and then enter the system administrator password. Other administrators can be added here, for the purposes of running SQL Server Management Studio.
Note: The password cannot contain the ampersand (&) symbol.
 8. Click **Next** through the remaining installation wizard screens and start the installation. Address any issues as required. When complete, a success installation message is displayed.
 9. Launch SQL Server Management Studio and confirm that it is possible to connect to the Instance.
 10. If needed, perform another backup or snap shot prior to installing Copitrak.
- Some steps might vary with different versions of SQL Server.

Installing Copitrak

After verifying that all prerequisites are met, you can begin to install Copitrak.

Close all other applications on the server prior to installing Copitrak.

- Microsoft SQL Server is installed
- Copitrak installation and update packages are downloaded and saved locally
- C:\ is used as the installation location

Only use the folder names and locations as specified in this guide. Using alternate names could lead to later problems with updates or the implementation of other features.

Note that the steps in this table do not correspond to the step numbers the following sections.

Step	Description	Done
1	Decompress Copitrak installation files	
2	Execute Copitrak installation batch file	
3	Enter ERS folder location	
4	Enter basic Copitrak installation information (administration account and SQL)	
5	Enter ERS.NET configuration information (location, SQL, and Desktop icon settings)	
6	Add Copitrak licenses	
7	Back up the Copitrak Scan Engine	
8	Back up the Desktop Client	
9	Stop the CtServiceMan service	
10	Decompress the service pack	
11	Execute the service pack batch file	
12	Restart the CtServiceMan service	
13	Update the Desktop Client	
14	Perform a full backup or take a snapshot of the Copitrak server	
15	Stop the RAWMon service	

Extract the Copitrak installation files

The Copitrak installation package is in a zipped format. Some of the files in the package are also zipped. Do not extract the sub-zipped files.

1. Browse to C:\ERS\Install\Install_Downloads\Copitrak.
2. Right-click the Copitrak installation package (CSS_700.2.0.12_Installation_Package.zip) and select **Extract All**.
3. Select C:\ERS\Install as the folder and click **Extract**.

Install Copitrak

1. Open the C:\ERS\Install folder, right-click the Installer_700.2.0.12.bat file, and select **Run as administrator**.
2. A command prompt opens, asking what directory you want to install to. Type `c:\ers` (not case-sensitive) and press **Enter**.
Note: If the path is typed incorrectly, you receive an “Improper Unzip Path” message. Confirm the path exists and review the spelling. Press **Enter** and try again.
3. Type the password for the Copitrak service account, then press **Enter**.
4. Type the name of the server and instance hosting the SQL database. If SQL Express was installed as per the instructions in [Install SQL Server Express 2014 with Tools](#), type `.\sqlexpress` and press **Enter**. You can also enter the full `<hostname>\<instance_name>`.
5. Type the SQL database account name:
 - If using SQL Express, then type `sa` and press **Enter**.
 - If using the full SQL Server, then enter the admin account.
6. At the SQL Password prompt:
 - If using SQL Express, enter the SA password. Press **Enter**.
 - If using full SQL Server, then enter the admin account provided by the customer.
Note: The password is visible.
7. The installation begins. The installation prompts you to configure [ERS.NET](#) once this preliminary installation routine has completed. Do not close the command prompt window.
8. If you get any error messages, it might be a typo in one of the previous questions. If you receive the “Windows cannot find the ‘C:\ERS\winers\dotnetfx.exe’.” message, then the **Unblock** step from the [Prerequisites](#) was not completed. To recover from a reported error at this stage:

- a. Close the Command window.
 - b. Click **OK** on the error message to close it.
 - c. Delete all content in the ERS folder except for the Install Downloads folder contents.
 - d. Address the issue.
 - e. Try the installation again.
9. For any other errors, send a copy of the C:\ERS\Install\InstallLog.txt log file to Copitrak Support to troubleshoot the installation problem.
 10. Note that the installer will add and configure the Web Server IIS role. It will be in 32-bit mode on a 64-bit server OS.

Configure ERS.NET

1. The installer batch routine automatically opens the ERS.NET window. Do not close the command prompt window in the background.
2. In the Destination Folder screen, enter the path for the ERS.NET folder:
C:\ERS\ers.net. Change the drive letter if required but make no other change.
Click **Next**.
3. Click **Yes** to create the folder when you are prompted.
4. Next, configure the SQL Connection settings. Select the server by clicking the down arrow to the right of the **Server** field. If the server name is not visible, type the name in the **Server** field. For a standard SQL Express installation, type .\SQLEXPRESS or <hostname>\<instance name> in the **Server** field.
5. In the **Authentication** section, type in the credentials of the administrator account.
 - If using SQL Express, enter sa in the **Username** field and type the SA password in the Password field.
 - If using the full SQL Server, enter the assigned account credentials. For the purposes of this guide, it is assumed that the password for the SA account has been defined as "Copitrak1."
6. In the **Database** section, click **Use Existing** to test to see if it can connect to the database. If an error appears, verify that both the server and authentication information have been properly entered.
7. Click **Create New** before continuing. The default database named **CopitrakERS** is automatically defined. Click **Accept** to continue.
Warning: Do not change the name of the database.
8. In the ERS SQL Configuration screen, click **Accept** to continue using the default values.
9. In the ERS.NET IISWebsite Settings screen, do not change anything and click **Accept**.

10. In the ServiceTrak Configuration screen, do not change anything. Note that either the TCP/IP address or DNS Hostname can be used to define the **ServiceTrak Server**. Click **Accept**.
11. In the RawMonitor Configuration screen, do not change anything and click **Accept**.
12. In the Desktop Configuration screen, as a best practice, clear all options to create different desktop icons and click **Accept**.
13. In the Review Configuration screen, click **Start** to continue.
Note: While ERS.NET is configured, some operating systems, such as Microsoft Windows Server 2008 R2, might display errors. In most cases, you can ignore these errors.
14. When the “ERS.NET Configuration Completed” message is displayed, click **Close**.

The ERS.NET dialog was called by the installer batch routine, which is still open in its Command Prompt window in the background. Do not close this window. When the ERS.NET configuration is complete, the batch installer resumes. Let the batch installer run; it will close when the installation is complete. If you receive any prompts to confirm an open file request, click **Run**.

After the Command Prompt closes, there is a new Copitrak folder on the desktop, which contains the Copitrak management utilities.

Add license

1. Locate the license file (*.lic) and copy it to the C:\ERS\LicenseFiles directory.
2. Restart the CSS License Manager service.
3. Open the new desktop Copitrak folder and launch CSS Manager.
4. Enter the default login `ers` at the log in screen.
5. Click **License Information** in the left-hand pane. The license information is displayed on the right. If not, the license issue must be addressed.

Note that Copitrak Phone licenses are not included with the main license and must be added separately using these same steps.

Applying service packs

Several steps must be taken before applying a service pack. Perform these actions to avoid later problems.

Back up the Copitrak Scan Engine

Backing up and restoring the scan engine avoids problems with scan quality. Complete the following steps:

1. Open the C:\ERS\CTLCommandLine folder and verify the version of the CopiTrakCmdLn.exe file. It should be v2014.702.0.0.
2. Close the Properties dialog and make a copy of the file. Rename it to end with the version number 2014.702.0.0.

Back up the Copitrak Desktop client

1. Go to C:\ERS\CopitrakDesktop and locate the tstpfltk.exe file.
2. Repeat the following steps from the [Configure ERS.NET](#) section for this file, but using its version number, 2012.3.1.3:
 - a. In the ServiceTrak Configuration screen, do not change anything. Note that either the TCP/IP address or DNS Hostname can be used to define the **ServiceTrak Server**. Click **Accept**.
 - b. In the RawMonitor Configuration screen, do not change anything and click **Accept**.

Install Service Pack SP002.17

For full documentation of the service pack, refer to the RL-CSS700R2_Release_Log_2015-12-08.doc file.

1. Go to the **Services** list, locate the CtkServiceMan service, and stop it.
2. Open the folder containing the zipped service pack, CSS700 R2_SP002.17.zip, open it, and extract the entire contents to the C:\ERS\Install directory.
3. Open the C:\ERS\Install folder and open the CSS700 R2_SP002.17 folder.
4. Open the SP002.17.exe archive. In the **Extract to** dialog box that appears, rename the path to C:\ERS\Install, and then click **Extract**.
5. Return to the C:\ERS\Install folder where the SP002.17 folder is now located. Open the SP002.17 folder.
6. Right-click on the SP002-17.bat file and select **Run as administrator** option.
7. A command window appears. If you have not stopped the CtkServiceMan service (step 1), stop it before you continue. Press **1** when you are ready to proceed or press any other key to cancel the update without any changes being made.
8. At the prompt for the Copitrak Desktop location, enter C:\ERS\CopitrakDesktop and press **Enter**.
9. Enter the password for the Copitrak service account at the prompt. The password is visible.
10. The service pack is installed. Do not close the command window during the installation. You can close the command window when the UPGRADE SUCCESSFUL message is displayed.
11. Return to the Services list and open the CtkServiceMan service properties.

12. Click on the **Log On** tab and change the setting to use the credentials of the Copitrak service account instead of the Local System account. Click **Apply**.
13. Start the CtkServiceMan service.

Revert the Scan Engine

1. Open the C:\ERS\CTLCommandLine folder, and in the file properties for CopiTrakCmdLn.exe, verify that the new version is v2014.702.3.0.
2. Close the Properties dialog and rename the file so that it ends with its version number 2014.702.3.0. The two files should now be visible:
 - CopiTrakCmdLn – 2014.702.0.0.exe
 - CopiTrakCmdLn – 2014.702.3.0.exe
3. Rename the original 2014.702.0.0 file so that the file name is just CopiTrakCmdLn.exe. You do not need to restart any services; the change takes effect immediately.

If you experience issues with scan quality, particularly with faded text, change the value of Despeckle to 0 in the C:\ERS\WINERS\Scantrak.ini file.

Update the Copitrak Desktop client

To install a new version of the Copitrak Desktop client, refer to the instructions in the [Kofax Copitrak Desktop Installation and Configuration Guide](#).

Stop the RAWMon service

To avoid later problems with pricing, stop the RAWMon service until all pricing is entered.

1. Go to the Windows Services utility and locate the RAWMon service. Stop it.
2. Open its Properties dialog and set the **Startup type** to **Disabled**.
3. Apply the change and close the dialog.
4. Start this service again once all pricing is entered. Refer to the *Kofax Copitrak Configuration Guide* for more details.