

Kofax Front Office Server

4.1.0

Administrator's Guide for
Canon MFPs



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Administrator's Guide for Canon MFPs

Preface

This guide describes how to prepare a Canon multifunction peripheral (MFP) to work with Kofax Front Office Server. After performing this procedure, you can create device profiles with shortcuts from Kofax Front Office Server Administration Console whenever needed.

See the Kofax website at www.kofax.com for supported models and application versions.

Related Documentation

In addition to this guide, Kofax Front Office Server includes the following documentation:

Kofax Front Office Server Installation Guide

The *Kofax Front Office Server Installation Guide* provides installation instructions and other information that helps you successfully set up Kofax Front Office Server.

Kofax Front Office Server Administrator's Guide

The *Kofax Front Office Server Administrator's Guide* shows you how to change the configuration by modifying properties files and performing other administration tasks to keep Kofax Front Office Server working properly.

Help for Kofax Front Office Server Applications

Help for Kofax Front Office Server Thin Client (also referred to as the Thin Client) and Kofax Front Office Server Administration Console (also referred to as the Administration Console) describes how to use the application. To view the Help from the interface, click the **Help** icon. The Help appears in a separate browser window.

Release Notes

Release notes provides late-breaking product information that may not be included in other Kofax Front Office Server documentation. The release notes are available for viewing or downloading from the Kofax website.

For instructions on using Kofax Capture, see the Kofax Capture guides and Help.

Training

Kofax offers both classroom and computer-based training to help you make the most of your Kofax Front Office Server solution. Visit the Kofax website at www.kofax.com for details about the available training options and schedules.

Getting Help for Kofax Products

Kofax regularly updates the Kofax Support site with the latest information about Kofax products.

To access some resources, you must have a valid Support Agreement with an authorized Kofax Reseller/Partner or with Kofax directly.

Use the tools that Kofax provides for researching and identifying issues. For example, use the Kofax Support site to search for answers about messages, keywords, and product issues. To access the Kofax Support page, go to www.kofax.com/support.

The Kofax Support page provides:

- Product information and release news
Click a product family, select a product, and select a version number.
- Downloadable product documentation
Click a product family, select a product, and click **Documentation**.
- Access to product knowledge bases
Click **Knowledge Base**.
- Access to the Kofax Customer Portal (for eligible customers)
Click **Account Management** and log in.

To optimize your use of the portal, go to the Kofax Customer Portal login page and click the link to open the *Guide to the Kofax Support Portal*. This guide describes how to access the support site, what to do before contacting the support team, how to open a new case or view an open case, and what information to collect before opening a case.

- Access to support tools
Click **Tools** and select the tool to use.
- Information about the support commitment for Kofax products
Click **Support Details** and select **Kofax Support Commitment**.

Use these tools to find answers to questions that you have, to learn about new functionality, and to research possible solutions to current issues.

Features

Kofax Front Office Server offers the following features with the Canon MFP.

- Management Through Kofax Front Office Server Administration Console (Optional)
MFPs are able to self-register with the Administration Console and automatically activate licenses. The number of MFPs you can use with Kofax Front Office Server depends on your product license. See the Kofax Front Office Server Administration Console Help for more information.

Important After you have connected a Canon MFP to Kofax Front Office Server, you cannot deactivate or delete the device from the Devices tab of the Administration Console.

- Kofax Front Office Server Front Panel
When the Kofax Front Office Server client is installed, a Kofax button is added to the front panel of the MFP to provide access to Kofax Front Office Server features. The appearance of the front panel depends on the MFP model.
- Log On
This feature enables you to log on to the MFP as a Kofax Front Office Server user. Logging on may provide additional options, such as personal shortcuts.
- Shortcuts

This feature facilitates the sending of documents. Use the Administration Console to create shortcuts and assign the shortcuts to device profiles. When the MFP connects to Kofax Front Office Server, the shortcuts display on the MFP front panel. Users can also create their own personal shortcuts with the Thin Client. When users log on at the MFP, any personal shortcuts appear along with group shortcuts associated with the user.

- Scan History

At the MFP, you can press the Scan History button on the main menu to view the scan history. If you are logged on, the history shows transactions you sent to Kofax Front Office Server from any connected device. If you are not logged on, the history shows transactions sent from all anonymous users on the device, as well as any transactions that are waiting to be sent to the server from the device.

Note Some MFP models do not include a Scan History button.

Status	Description
Pending	Submitted on local client but not uploaded to server yet. or Ready to start scanning.
Uploading	Uploading to server.
Queued	Submitted and in the server processing queue.
Processing	Submitting to destination.
Inbox	Successfully sent to an inbox destination, but not yet sent to final destination. or Created in the thin client, but not yet submitted.
Merged	Multiple documents are merged into a single document. The parent history record status remains as <i>Inbox</i> , but the status for child records is changed to <i>Merged</i> .
Completed	Successfully sent to destination.
Retry	Error occurred and job will be retried later.
Error	Failed to send to destination after three attempts. Status is <i>Retry</i> while a retry is scheduled.
Deleted	User deleted transaction from the inbox, or the administrator removed it during transaction review.

- Display Confirmation Messages

You can enable confirmation messages to be sent from Kofax Front Office Server to this MFP so that users can see status information about their transactions. Messages appear on the MFP front panel when each scanned transaction reaches the server, or if a problem occurs. See the Administration Console Help for instructions on setting up confirmation messages.

- Language Support

At the MFP front panel, you can specify the language. If the language specified is not supported by Kofax Front Office Server, English is used by default.

- Batch and/or Index Fields

You can enter values for batch and/or index fields at the MFP. When you define shortcuts in the Administration Console, you can enter default values into fields for these shortcuts. The data is also validated for an appropriate type and length. You can also customize

the validation and field lookup options. For information, see the *Kofax Front Office Server Administrator's Guide*.

- **Coversheet Destination**

This destination enables you to add a coversheet generated by Kofax Front Office Server to documents you want to send.

You can include more than one coversheet in a scan job. Put the coversheet in front of the documents that you want to send to a destination. If you scan at an MFP, the separated documents are sent to the destinations encoded on the coversheet.

Coversheets can also be used when scanning directly into the Thin Client. Coversheets separate the pages into individual documents. You can then send the documents to their destination with the data encoded in the coversheet.

- **Enhanced Lookup**

Depending on the configuration, you can look up fax numbers and email addresses at the MFP. Kofax Front Office Server retrieves fax number and email address lists from Active Directory, personal address books, and the database table customemailfaxlookup. For information about the various data sources and necessary configuration steps, see the *Kofax Front Office Server Administrator's Guide*.

At the front panel of the MFP, press the fax number or email address field to open the onscreen keyboard and type the search entry. Then, press **Search** to obtain the list of matching entries.

- **Dynamic Browsing for SharePoint and Folder Destinations**

For folder destinations, users can dynamically browse the directory structure. For SharePoint and CMIS destinations, the user can dynamically select where the document will be stored.

- **Export Settings**

When configuring destinations or shortcuts, you can use the Export Settings tab to set preferences for exported documents.

- **Customized Validation and Lookup Options**

You can customize validation and a variety of field lookup options, as well as form validation. For information about the necessary configuration steps, see the *Kofax Front Office Server Administrator's Guide*.

- **Device Logging**

Log messages from the device are stored on the server. Each file is named according to its device ID, and they are stored in the following folders where Kofax Front Office Server is installed:

- `Log\Service`: Contains logs related to asynchronous activities, such as exporting jobs to destinations.
- `Log\WebApp`: Contains logs related to activities from Administration Console, Thin Client, MFPs, and Web Services.

- **Help**

Help is available at the MFP touch screen. Users can press the question mark or Help button on the touch screen to view information about the screen.

Installing the Kofax Front Office Server Application on the MFP

Use the following procedures to install or upgrade the Kofax Front Office Server application.

Caution If you use SSL, your certificate must use the RSA algorithm. With SSL, if the “validate server certificate” setting is not selected, install the device certificate. Otherwise, the MFP cannot connect to Kofax Front Office Server.

Preparing for the Installation

Before installing the Kofax Front Office Server application on the MFP, do the following:

- Install Kofax Front Office Server.
- Make sure that you have an open port for communication between Kofax Front Office Server and the MFP.
- Check your MFP manual for memory requirements. If you scan at 400 dpi color or grayscale (configurable in the shortcut settings for the device profile), scanning could fail for MFPs that do not have expanded memory.

Installing the Kofax Front Office Server Application

- 1 From your browser, launch the Service Management Service (SMS) at `http://<IP address of the Canon MFP>:8000/sms/`. Log on as a user with MEAP installation rights.
- 2 Go to the SMS installation page (directions may vary, depending on the version of SMS on the MFP).
- 3 Select the application file:
 - a Click **Browse** to the right of the Application File field.
 - b Navigate to the folder where you downloaded the Canon client software.
 - c Select the file with the .jar extension.
- 4 Select the license file as follows:
 - a To the right of the License File field, click **Browse**.
 - b Navigate to the folder where you downloaded the Canon client software.
 - c Select the license file, which has a .lic extension.

Important The license file can only be used to install a client once per MFP. After a license file has been used, it cannot be reused. When you uninstall the client, follow the step to download a new licence file so it can be used when reinstalling the client.

- 5 Click **OK**.
- 6 Follow the SMS instructions to complete the installation.

Setting Up Authentication

- 1 On the Application page, click **Kofax**.
- 2 Enter the department ID and password for a Canon user with the appropriate rights. and click **Set**.
- 3 When the authentication information is set, click **OK**.
- 4 Return to the Application List page and start the Kofax Front Office Server application. After the application is started, the Kofax button is added to the MFP screen.

Completing the Installation

- 1 On the MFP, press the **Kofax** button. Depending on the installation history, do one of the following:
 - For installations, the Settings page appears.
 - For upgrades, if the Settings page does not open automatically, press **Settings**.
- 2 On the Settings page, do the following:
 - a Enter the host name or IP address of Kofax Front Office Server.
 - b If Kofax Front Office Server uses a virtual directory, enter the name of the directory in the Path field.
 - c Configure the other settings as needed.
 - d Press **OK**.

The main menu appears on the front panel.
- 3 Use the Kofax Front Office Server Administration Console to make sure the MFP is added to the Devices list, create shortcuts, and add the MFP to a device profile.

Uninstalling the Kofax Front Office Server Application

You can uninstall the Kofax Front Office Server application when needed. Before uninstalling the application, make sure that any scanned documents have been received.

Note During the uninstallation process, you will be stopping the Kofax Front Office Server application. If you do so before a scan job is completed and received, the interruption will most likely cause data loss.

- 1 From your browser, launch SMS at `http://<IP address of the Canon MFP>:8000/sms/`. Log on as a user with MEAP installation rights.
- 2 In the MEAP Application Management list, find the Kofax Front Office Server application and do the following:
 - a Stop the application.
 - b Click the link for the Kofax application.
 - c Click **Disable**.
 - d Click **Download** to download a license file and save it to a secure folder.

Important This step is required if you are reinstalling the application on this MFP. The license file you used to install the application cannot be used after you uninstall. If you do not download a license file during uninstallation, you need to obtain a new license file from Canon before you reinstall.
 - e Click **Delete**. When you are prompted to confirm the deletion, click **Yes**.
 - f Return to the MEAP Application Management list.
- 3 Click **Uninstall** next to the Kofax application. When you are prompted to confirm, click **Yes**.
The application is removed from the device.

Additional Information

The following is additional information which may be of interest to you when working with Kofax Front Office Server and the MFP.

Scan with Short Edge Feed

Always scan documents with the short edge feed so that it uses portrait mode. If you attempt to scan in landscape mode with the long edge feed, the scanned image is cropped to portrait.

Handling of Unsupported Paper Sizes

If a paper size defined in Administration Console is not supported by the MFP, the scanned image will be the largest paper size in the feeder. If the original image is smaller than the largest paper size, the image is kept at the original size with white space surrounding it.

