

Kofax Front Office Server

4.1.0

Administrator's Guide for
Lexmark MFPs



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Administrator's Guide for Lexmark MFPs

Preface

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

Before continuing, 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

The following features are available with the Kofax Front Office Server application for the Lexmark MFP.

- Management Through Kofax Front Office Server Administration Console
MFPs are able to self-register with the Administration Console and automatically activate licenses. (This feature is optional.) You can also manually activate, deactivate, or remove MFPs whenever needed. In the Administration Console, you can open the Web page for the MFP if Kofax Front Office Server can communicate over the network with the MFP.
The number of MFPs you can use with Kofax Front Office Server depends on your product license.
- 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.

- **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.

- **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.

- **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.

System Requirements

Before installing the Kofax Front Office Server application for the MFP, note the following:

- Make sure the MFP has a hard drive with sufficient storage space for images. Models without a hard drive are not supported.
- Make sure the MFP has a color touch screen. Models without a color touch screen are not supported.

Installing Kofax Front Office Server on the MFP

Use the Lexmark Web page to install the Kofax Front Office Server application. Installation consists of the following processes:

- Installing the application on the MFP
- Configuring the MFP to connect to Kofax Front Office Server
- Making sure the application on the MFP has started

Follow these steps to install the Kofax Front Office Server application on a single MFP. To install and configure multiple MFPs at one time, see [Configuring Multiple MFPs](#).

- 1 Go to the internal Lexmark Web page by entering the URL for the MFP in your browser window.
- 2 On the Device Status page, click Configuration (on the left side of the page).

Note Labels on the Web interface may differ depending on the model. For example, "Configuration" may be labeled "Settings."

- 3 On the Configuration page, under Other Settings, select Embedded Solutions.
- 4 On the Installed Solutions page, click **Install**.
- 5 On the Install A New Solution page, for the Solution Install File box, click **Browse**.
- 6 In the "Choose file" window, locate and open the application file, KofaxLexmarkClient.flx. The file is located in the Kofax Front Office Server application data path in the Kofax Capture share in \KFS<version>\MFPClients\lexmark.
- 7 On the Install A New Solution page, with the path and file now appearing in the Solution Install File box, click **Start Install**.

When the installation is complete, Kofax appears on the Installed Solutions page, under Installed Solutions.

Upgrading Kofax Front Office Server on the MFP

To upgrade Kofax Front Office Server on the MFP, use the same installation procedure to install the new application file. You do not have to uninstall the previous version. When the installation is complete, the new version of Kofax Front Office Server appears in the Installed Solutions page.

Configuring the MFP to Connect to Kofax Front Office Server

- 1 On the MFP website, go to the Installed Solutions page.
- 2 Under Installed Solutions, select Kofax
- 3 On the Kofax Configuration page, click **Configure**.

Note Labels on the Web interface may differ depending on the model. For example, "Configuration" may be labeled "Settings."

- 4 On the Configure page, change the configuration settings associated with Kofax Front Office Server as needed. Move your mouse pointer over the question mark (?) buttons to display Help for each setting.

Note the following:

- The supported resolutions are 150, 200 (recommended), 300, and 400 dpi.
- If Kofax Front Office Server uses a virtual directory, enter the name of the directory in the Path field.

- 5 Click **Apply**.

- 6 Verify that the Kofax application has started:

- a On the Kofax Configuration page, click the **Solutions** tab.

- b On the Installed Solutions page, under State, make sure Running is indicated in the State column for Kofax Front Office Server.

If Running is not indicated, start the Kofax application as follows:

- Select the check box to the left of Kofax.
- Click **Start**.

The State column indicates Running.

After closing the Lexmark Web page, a Kofax button is displayed on the MFP Home screen.

Kofax Button



The MFP is now ready to use with Kofax Front Office Server. Depending on the Administration Console settings, pressing the Kofax button causes the MFP to self-register and license itself, and connect to the default device profile if one is defined. See the Administration Console Help for information about self registration and default device profiles.

Configuring Multiple MFPs

You can install Kofax Front Office Server and configure multiple MFPs at one time using the Lexmark MarkVision Professional device management tool. To use this tool, you need access to the following two files located in the Kofax Front Office Server application data path in the Kofax Capture share in `\KFS<version>\MFPClients\lexmark:`

- KofaxLexmarkClient.flx
- KofaxLexmarkClient_desc.xml

- 1 Install the Kofax client application on each MFP.

- a In MarkVision Professional, select all of your MFPs.

- b Under All Tasks, select Embedded Solutions - Solutions Management and click **Install**.

- c Browse to the KofaxLexmarkClient.flx file and install it. If you receive a message about devices not responding, click **Continue**.

- 2 Select one of the MFPs and click **Kofax** from the list of print servers.
- 3 Click **Fetch Descriptor(s)**, and browse to and select the KofaxLexmarkClient_desc.xml file.
The Kofax solution is installed on the MarkVision server.
- 4 Select all of the MFPs and select the Kofax application.
- 5 Click **Configure**. The Configure Solution window opens.
- 6 Enter the information for your Kofax configuration, and then click **OK**.
- 7 Verify that the configuration succeeded by viewing the configuration Web pages of some of the MFPs.

Lexmark X548 Default Settings and Color Scans

On the Lexmark X548, grayscale images of originals with a colored background may require scanning at 300 dpi resolution instead of the default 200 dpi. The higher resolution enables Kofax VRS to remove the background and resolve text clearly when the scanned images are converted to bitonal images.

Device Profiles Updates

When a device profile associated with an MFP changes, the changes are reflected on the main menu panel of the MFP when it polls Kofax Front Office Server. This poll occurs when the Kofax Front Office Server application button is pressed. To ensure the MFP contains the most current device profile information, do the following:

- Make changes to device profiles when there is low user activity, such as at night.
- Set the MFP inactivity timeout to a short period, such as one to three minutes, so that the next user who presses the Kofax button retrieves the latest profile.

MFP Shutdown

When you shut down the MFP, be aware of the following:

- Allow 10 seconds after performing the last scan job before shutting down the MFP.
- If you shut down the MFP before responding to the prompts on the Scan Complete page, scanned pages can be lost.
- If you shut down the MFP after the scan job is complete but before all scanned pages are delivered, delivery should finish when you turn on the MFP again.

Removing the Kofax Application

You can remove the Kofax application when needed. Before removing the software, make sure that any scanned documents have been received.

Important Make sure that scan jobs are completed and received before removing the application. The removal process stops the application. Jobs that were not completed and received can be lost.

- 1 Go to the Lexmark Web page by entering the URL for the MFP in your browser window.
- 2 On the Device Status page, click Configuration (on the left side of the page).

Note Labels on the Web interface may differ depending on the model. For example, "Configuration" may be labeled "Settings."

- 3 On the Configuration page, under Other Settings, select **Embedded Solutions**.
- 4 On the Installed Solutions page, under Installed Solutions, select the check box to the left of Kofax.
- 5 Click **Stop**.
The State column indicates Stopped.
- 6 Select the check box to the left of Kofax and click **Uninstall**.

The Kofax application is removed from the list of installed solutions.

Additional Information

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

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.