

Kofax Front Office Server

4.1.0

Administrator's Guide for
Xerox MFPs



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Administrator's Guide for Xerox MFPs

Preface

This guide describes how to prepare a Xerox multifunction peripheral (MFP) to work with Kofax Front Office Server. 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 Kofax Front Office Server features are available with the Xerox 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.

- **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.

- **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.

- **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

Kofax Front Office Server uses the Xerox Extensible Interface Platform (EIP) to communicate with the Xerox MFPs. Only Xerox MFPs supporting the Extensible Interface Platform (EIP) and with Xerox Widgets Version Revision 2 or higher can be used. The latest firmware and EIP version have to be installed on the Xerox MFPs.

To enable EIP on the MFP, follow the instructions provided by Xerox:

- 1 Create a self-signed certificate or install your own certificate.

- 2 Enable SSL.
- 3 Enable Extensible Service Setup, which is under Properties in General Setup. Make sure you enable the Extensible Services Browser.

Although you must enable SSL on the MFP, using SSL is not required to connect to Kofax Front Office Server. However, connecting to Kofax Front Office Server through SSL is recommended for data security.

Preparing for the Registration

Before registering Kofax Front Office Server with the MFP:

- Install Kofax Front Office Server.
- Verify that all Xerox MFPs connected to the same Kofax Front Office Server have the same user name and password.
- Use low-resolution grayscale images to optimize performance. Resolutions greater than 200 dpi may adversely affect performance.

Registering the MFP with Kofax Front Office Server

To enable the MFP to communicate with Kofax Front Office Server, run a client registration program to register the Kofax Front Office Server Client as an application on the MFP and provide the URL so the MFP can make the initial call to the Kofax Front Office Server when the Kofax application is started on the MFP.

The KofaxXeroxRegistration.exe program is a standalone Windows application that can be run from any computer on or outside the network where the MFP is located. Follow the instructions to register a Kofax Front Office Server or connect to a different Kofax Front Office Server.

After registration, a Kofax button should appear on the MFP front panel. Depending on the model and configuration, you may need to press a Services or Custom Services button to view the Kofax button.

Registering Kofax Front Office Server with the Xerox MFP

- 1 Go to the Kofax Front Office Server application data path in the Kofax Capture share in `\KFS<version>\MFPClients\xerox\registration`, and run `KofaxXeroxRegistration.exe`.
The Xerox Registration Client window opens.

Xerox Registration Client

- 2 In the Device Connection section, provide information for the MFPs you are registering. To register multiple MFPs at one time, do one of the following:
- Enter MFP host names or IP addresses separated by commas into the “MFP Host Names or IP Addresses (comma separated)” field.
 - Or, create a plain text file containing a comma, tab, or semicolon delimited list of host names or IP addresses of the MFPs (see the example that follows). In the Delimiter field of the registration client, select the type of delimiter that is used in the file. Click the **CSV File** button and select the file.

Important To register multiple MFPs, the administrator credentials must be the same on every MFP.

The following example is a comma-delimited list containing IP addresses, host names, MAC addresses, and MFP model names. The IP address must be in the first column.

```
173.21.45.23,purchasing01,11-22-33-44-55-66,Purchasing 1
173.21.45.24,purchasing02,11-22-33-44-55-67,Purchasing 2
173.21.45.25,purchasing03,11-22-33-44-55-68,Purchasing 3
173.21.45.26,purchasing04,11-22-33-44-55-69,Purchasing 4
173.21.45.27,purchasing05,11-22-33-44-55-70,Purchasing 5
```

The registration program registers each MFP in order until all of the ones listed in the file are registered.

If you do not have such a file, create a list of all your IP addresses or host names with a line break after each, as shown in the following example. If you use this method, it does not matter what is selected in the Delimiter field.

```
173 . 21 . 45 . 28
173 . 21 . 45 . 29
173 . 21 . 45 . 30
173 . 21 . 45 . 31
173 . 21 . 45 . 32
```

- 3** Complete the Registration section as follows:
 - a** Enter the host name or IP address of Kofax Front Office Server.
 - b** To verify that the host name or IP address is correct, click **Test**.
A window indicates whether the connection is successful or not. Click **OK** to close the window.
 - c** If Kofax Front Office Server uses a virtual directory, enter the name of the directory in the Path field.
 - d** Select the type of connections in Server Protocol field, either **http** or **https**.
- 4** Click **Register**.
When the registration process is completed, the Registration Results window lists successful deployments as well as any errors. Right-click and copy one or more selected items or all failed items.
- 5** When you finish viewing the Registration Results window, click **OK** and close the client registration program.

Registering a Different Kofax Front Office Server Installation

- 1** Go to the Kofax Front Office Server application data path in the Kofax Capture share in `\KFS<version>\MFPClients\xerox\registration`, and run `KofaxXeroxRegistration.exe`.
The Xerox Registration Client window opens.
- 2** Verify that the Device Connection section contains the information for the MFP.
- 3** Click **Unregister**.
- 4** Complete the Registration section with the new information and click **Register**.
- 5** When you receive the successful activation message, close the client registration program.

The MFP is now ready to use with Kofax Front Office Server. The Kofax button appears on the network scanner main menu. 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.

Changing the Scan Mode

By default, Kofax Front Office Server uses Xerox HTTP(s) Scanning. You can change to Xerox FTP Scanning if you are unable to use HTTP/HTTPS. In Administration Console, create a

new advanced setting to change the scanning mode. Refer to the Administration Console Help for instructions on creating new advanced settings and create the following settings. For each setting, specify `mfp.xerox.properties` as the namespace.

Property	Description and Settings
<code>http.scan.enabled</code>	Enable Xerox HTTP(s) Scanning. <ul style="list-style-type: none"> ▪ true: Use Xerox HTTP(s) Scanning ▪ false: Use Xerox FTP Scanning
<code>ftp.server.host</code>	FTP server host used by Xerox device to send scanned image files. Note: a blank value will stop polling if no Xerox devices are used.
<code>ftp.server.lock.timeout</code>	FTP lock timeout, expressed in minutes. We recommend that you do not change the value unless instructed to do so by Technical Support personnel.
<code>ftp.server.max.job.age.mins</code>	Max incomplete FTP job age in minutes. Older jobs are considered failed jobs, default = 60. Note: the FTP server and the Kofax Front Office Server clocks must be synchronized for this to work as intended.
<code>ftp.server.max.job.processing.attempts</code>	Number of attempts to process a job before moving it to the failed jobs folder, default=5. Note: in a Kofax Front Office Server cluster configuration this would be per node so total attempts could be higher.
<code>ftp.server.password</code>	FTP user password.
<code>ftp.server.path</code>	Path on FTP server host where Kofax Front Office Server files are stored, must start with <code>/</code> .
<code>ftp.server.polling.initial.delay.ms</code>	FTP polling timer initial delay in milliseconds, default = 10000
<code>ftp.server.polling.interval.ms</code>	FTP polling timer interval in milliseconds, default = 120000
<code>ftp.server.username</code>	FTP user name

Note If you are upgrading from a previous version of Kofax Front Office Server, the FTP properties still appear in the Advanced tab. You still need to create the `http.scan.enabled` property.

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.

Optimizing the Image Scan Quality

Kofax Front Office Server supports configuring several scan settings for the Xerox MFPs.

- 1 In Administration Console on the Settings - Advanced tab, locate the `mfp.xerox.properties` property.
- 2 Specify the scan settings as needed. The descriptions provide instructions.
- 3 Save your changes.
The changes are applied the next time a job is scanned. You do not have to restart Kofax Front Office Server for the changes to take effect.

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.

