

Kofax Front Office Server

Administrator's Guide for Kyocera MFPs

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The logo consists of the word "KOFAX" in a bold, blue, sans-serif font. The letters are closely spaced and have a consistent weight throughout.

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Administrator's Guide for Kyocera MFPs

Preface

This guide describes how to install the Kofax Front Office Server front panel software, which is client software that resides on the MFP. After performing this procedure, you can create and update device profiles with shortcuts from Administration Console whenever needed. When the MFP contacts Kofax Front Office Server, the updated device profiles are retrieved and display on the MFP.

Before continuing, see the Technical Specifications document, which is available on the Kofax website at www.kofax.com, for supported models and application versions.

Important If you are upgrading Kofax Front Office Server, you must upgrade the client software on all MFPs to implement the latest security features.

Related documentation

The product documentation set for Kofax Front Office Server is available at the following location.

<https://docshield.kofax.com/Portal/Products/KFS/4.3.0-ugsc6qbedi/KFS.htm>

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 the 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 with Kofax products

The [Kofax Knowledge Base](#) repository contains articles that are updated on a regular basis to keep you informed about Kofax products. We encourage you to use the Knowledge Base to obtain answers to your product questions.

To access the Kofax Knowledge Base, go to the [Kofax website](#) and select **Support** on the home page.

Note The Kofax Knowledge Base is optimized for use with Google Chrome, Mozilla Firefox or Microsoft Edge.

The Kofax Knowledge Base provides:

- Powerful search capabilities to help you quickly locate the information you need.
Type your search terms or phrase into the **Search** box, and then click the search icon.
- Product information, configuration details and documentation, including release news.
Scroll through the Kofax Knowledge Base home page to locate a product family. Then click a product family name to view a list of related articles. Please note that some product families require a valid Kofax Portal login to view related articles.
- Access to the Kofax Customer Portal (for eligible customers).
Click the **Customer Support** link at the top of the page, and then click **Log in to the Customer Portal**.
- Access to the Kofax Partner Portal (for eligible partners).
Click the **Partner Support** link at the top of the page, and then click **Log in to the Partner Portal**.
- Access to Kofax support commitments, lifecycle policies, electronic fulfillment details, and self-service tools.
Scroll to the **General Support** section, click **Support Details**, and then select the appropriate tab.

Features

The following Kofax Front Office Server features are available with the Kyocera MFP. See the Help for the Administration Console and the Thin Client for more information.

- 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.

- Client software on the MFP

When the client software is installed, a 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 appear 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.

Jobs can be cancelled, depending on their status. After the cancellation is complete, the job remains in the log and has a Deleted status.

Status	Description
Pending*	Submitted to the configured FTP or WebDAV folder. or Ready to start scanning.
Sending*	Sending or uploading the job from the configured FTP or WebDAV folder to the server.
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.
Error to Inbox	Indicates that the job has failed and was sent to the user's inbox.
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.
Retrying*	The job is being resent after it failed in a previous attempt. This message indicates the number of the retry attempt.
Retry Pending*	The job failed to be sent and another attempt will be made. This message indicates the number of the retry attempt.
Canceling	The job is being cancelled by user request.
Pending Cancellation	A request was made by the user to cancel the job.

Status	Description
Error	Failed to send to the server or other destination after three attempts. Status is <i>Retry</i> while a retry is scheduled for the selected server or destination.
Deleted	User cancelled the transaction or deleted transaction from the inbox, or the administrator removed it during transaction review.
* Can be cancelled manually from the Scan History window. The number of attempts, duration between attempts, and the behavior for handling a failed job is configured in the Administration Console. If the failed job is retried or cancelled, the device processes it after finishing all other jobs pending for process.	

- 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.

Note If you change the language, restart the Kofax client software in order for the change to take effect.

- 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.

- Scanned page count

This feature displays the number of pages that have been scanned. When you add pages to a document, the front panel displays the number of newly scanned pages and the total number of pages in the document.

- 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

The primary source of information about supported devices and other Kofax Front Office Server requirements is the Technical Specifications, which is available on the Kofax website at <http://www.kofax.com>.

Before installing the Kofax Front Office Server client software for the Kyocera MFP, also do the following:

- Install Kofax Front Office Server.
- Download the Kyocera client software from the Administration Console.
- Make sure you have sufficient licenses to use your MFPs.
- Make sure that you use a supported Kyocera MFP that has HyPAS installed. See the Kofax Front Office Server Support pages on the Kofax website for supported MFPs.
- Verify that the device has data storage. If it does not have a hard drive, insert either an SD or Compact Flash card for flash storage.
- When using device authentication with Kofax, verify that the timeout setting is set to enable the device to prepare the largest likely scanned documents for sending to Kofax. If the device logs out before finishing, the scan job is lost.

Support for single sign on

Kofax Front Office Server supports single sign on for users who are also registered users on the Kyocera MFP. Users who log on to the MFP are also logged on automatically to Kofax Front Office Server.

To use single sign on, the user name for the MFP must exactly match the user name for logging on to Kofax Front Office Server. User names for a Kyocera MFP are set using the Login User Name property of the device. See the Kyocera documentation for instructions.

Network and server troubleshooting

If the MFP is disconnected from the network, or if Kofax Front Office Server is down, the current scan job can continue, and the images are saved on the MFP hard drive. Until the server connection is restored, the client cannot be used. When the connection to Kofax Front Office Server is restored, the documents on the MFP hard drive are sent to the specified destinations and the client can resume normal operations.

Installing the Kofax client software

Install the Kofax client software by using either of the following methods:

- Use the Kyocera Net Viewer to install the software from a computer connected to the device.
- Install the software directly on the device by copying the installation package file to a USB drive and running the installation. Format the USB drive before copying the installation package file. That file needs to be the only file on the drive.

When the installation is complete, the Kofax button appears on the front panel. Tap the button to start the client software.

For more information about installing software on a Kyocera MFP, refer to the documentation provided with your device.

Important If the MFP already has the Kofax client software, uninstall it before installing new client software. See [Uninstalling the Kofax client software](#) .

Installing with Kyocera Net Viewer

To install the Kofax client software, use Kyocera Net Viewer version 5 or any later version that supports the installation of HyPAS Java applications. When you install Kyocera Net Viewer, select the option to install device management components. You also need to set the following options on the device to support remote installation. (See the Kyocera documentation for more information.)

- SNMPv3 Setting
 - SNMPv3: On
 - Authentication: On
 - Hash: MD5
 - Privacy: On
 - Encryption: DES
 - Read/Write User Name: The name of the user and password are set.
- SSL Setting
 - SSL: On

- IPP over SSL Setting
 - IPP over SSL: On

For more information about using Kyocera Net Viewer, see the help provided with the application.

1. Start the Administration Console as described in the *Kofax Front Office Server Administrator's Guide* and log on as a user with administrator rights.
2. Download and save the Kyocera client software as shown in the Administration Console Help. The downloaded client software should contain the installation package files.
3. Start Kyocera Net Viewer.
4. If the device where you want to install the client software has not already been discovered, add it.
5. Right-click the device and select **Advanced > Authentication Settings**.
6. When prompted, enter the user name and password for the device administrator.
7. Leave **Use local authentication** unselected and click **OK**.
8. Right-click the device and select **Advanced > Manage applications**. The Manage Applications window appears.
9. Select **Install application** and select the option **Activate application after installation**. Click **Next**.
10. Select the installation package as follows.
 - a. Click **Browse**.
 - b. In the Open window, navigate to the folder where you downloaded the Kyocera client software.
 - c. Select the appropriate package file for your type of device:
 - KofaxKyoceraClient.pkg: Use this file for JavaME platform and JavaSE 8 platform devices.
 - KofaxKyoceraClient_SE.pkg: Use this file for JavaSE 8 platform devices only.
 - d. Click **Open**. The Open window closes, and the name of the package file appears in the File field.
 - e. Click **Next**. The Confirmation screen shows information about the package file you are installing.
11. Select **Activate without a license key** and click **Finish**. The front panel software is installed.
12. Click **Close** to close the **Managed Applications** window.

Installing directly on the device

1. Start the Administration Console as described in the *Kofax Front Office Server Administrator's Guide* and log on as a user with administrator rights.
2. Download and save the Kyocera client software as shown in the Administration Console Help. The downloaded client software should contain the installation package files.
3. Copy the appropriate installation package file to a USB drive:
 - KofaxKyoceraClient.pkg: Use this file for JavaME platform and JavaSE 8 platform devices.
 - KofaxKyoceraClient_SE.pkg: Use this file for JavaSE 8 platform devices only.

4. Insert the USB drive by doing the following:
 - a. Turn off the MFP.
Turning off the MFP first ensures that the USB drive is properly recognized and read.
 - b. Insert the drive in the USB port.
 - c. Turn the MFP back on.
5. Press the System Menu button on the MFP front panel. This button may be called System Menu/Counter on some models.
The System Menu screen appears.
6. On the screen, tap **Application**. This button may be called Favorites/Application on some models. You may need to go to another page of the System Menu screen to locate the button.
7. When you are prompted to log on, enter the user name and password of an administrator on the device.
The Application screen appears.
8. Tap **Add**.
Some models have a + button on the upper right corner of the screen. Tap + to add applications.
The screen lists applications available to install. One of them should be Kofax.
9. Tap the box to the left of Kofax to select it for installation.
10. Tap **Install**. When you are prompted to confirm, tap **Yes**.
The screen indicates when the installation is complete.

Configuring a secure connection with SSL

If you are using SSL and want the Kofax Kyocera client to validate the certificate, import the certificate for the server used by Kofax Front Office Server to the MFP and then set the client to validate the certificate. The Kofax Kyocera client does not validate the server certificate by default. Use the HyPAS Device Online page to import the certificate.

1. Log on to the HyPAS Device Online page as an administrator.
See the Kyocera documentation for instructions.
2. Under Contents, click **Certificate**.
The Certificate Manager Page appears.
3. Click **Import**.
4. In the Import Certificate window, click **Browse**.
5. Navigate to the folder containing the certificate file. Select the file and click **Open**.
The Choose File to Upload window closes, and the full path to the file appears in the Import Certificate window.
6. Click **Import**.
When the import is successful, the certificate appears in the Server Certificate list. If you want to view the certificate's details, click **View**.
7. Close the HyPAS Device Online page.

8. Configure the MFP to validate the imported certificate as follows:
 - a. Start the Kofax Kyocera client on the MFP.
 - b. Tap **Settings**.
 - c. Locate the **Validate server certificate** field, which may be on the second page of settings.
 - d. Change the setting for the **Validate server certificate** field to **true**.
 - e. Tap **OK**.
 - f. Restart the device.

The certificate is validated each time the MFP communicates with the server.

Uninstalling the Kofax client software

Uninstall the Kofax client software if you are no longer using Kofax Front Office Server with the MFP or to deploy an updated version of the client software. Uninstall the current version of the client software before deploying a new version.

As with installation, you can uninstall the client software through Kyocera Net Viewer or directly on the device. Follow the applicable instructions.

Uninstalling with Kyocera Net Viewer

1. Start Kyocera Net Viewer.
2. If the device with the client software has not already been discovered, add it.
3. Right-click the device and select **Advanced > Manage applications**.

The Manage Applications window appears.
4. Select **Uninstall application** and click **Next**.
5. Select **Specify application installed on the device** and click **Next**.
6. When you are prompted to log on, enter the user name and password of an administrator on the device. Do not select **Use local authentication**. Click **OK** to log on.

A list of applications installed on the device appears.
7. Select Kofax and click **Next**.
8. Click **Finish**.
9. When the client software has been uninstalled, click **Close**.

Uninstalling directly from the device

1. Press the System Menu button on the MFP front panel. This button may be called System Menu/Counter on some models.

The System Menu screen appears.
2. On the screen, tap **Application**. This button may be called Favorites/Application on some models. You may need to go to another page of the System Menu screen to locate the button.
3. When you are prompted to log on, enter the user name and password of an administrator on the device.

The Application screen appears with Kofax listed as one of the installed applications.

4. Tap the box to the left of Kofax to select it for uninstallation.
5. Tap **Delete** or the trash can icon. When you are prompted to confirm, tap **Yes**.
The screen indicates when the application has been uninstalled.
6. Tap **Close** or **End**, depending on your model.
The System Menu screen closes.

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 the 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.

Minimum supported resolution

The minimum supported resolution for Kyocera MFPs is 200 dpi. If a document is sent to a destination or shortcut configured for 100 dpi, the image is scanned automatically at 200 dpi.

Field data limit from Kofax Capture not enforced

If you configure a Kofax Capture batch class that includes a field type with the data type set to Double with 15 numeric digits, and then create a Kofax Front Office Server shortcut based on that batch class, the limit is not enforced on a Kyocera MFP.

Image preview

Kyocera MFPs can display a preview of the image in the Scan Preview window.

Enable the feature in the Administration Console. In the Advanced - Settings tab, set `mfp.scan.preview` in the `mfp.kyocera.properties` namespace to true. The change is applied when the Kofax client is started. Only newly scanned pages are displayed for preview.

The Scan Preview window shows the document you scanned and enables you to process it. Use these buttons to view the pages scanned:

- Under Page Tools, press the button to delete the currently displayed page.
- Under New Pages Navigation, press Left Arrow or Right Arrow to view the previous or next page.
- Under Zoom, select to view the image at its actual preview size or to fit the entire image in the window.

Then use these buttons to process the document:

- Press **Cancel** if you do not want to send this scan job.
- Press **Start New Job** to send this scan job and start a new scan job to the same location.
- Press **Add More Pages** to scan more pages to the current scan job.

- Press **Send and Exit** to send this scan job and return to the main menu.

After a period of inactivity, the MFP automatically sends the scan job and returns to the main menu.

Hiding Log Off and Settings button

You can hide the Log Off and Settings buttons on the MFP client. Use the following settings in the `mfp.kyocera.properties` namespace:

- `logoff.button`: Display or hide the Log Off button on the MFP client. Set to true (default) to display the button or false to hide it.
- `settings.button`: Display or hide the Settings button on the MFP client. Set to true (default) to display the button or false to hide it.

Frequently asked questions

If you cannot successfully install the software, or if you have questions about how the software operates, see the information in this section. For additional information and software updates, see the Kofax website.

Why does clicking Discover not find the MFP?

Use the Refresh command to update the list of discovered devices. The MFP may be offline, on a separate network, outside a firewall, or does not have a PostScript card installed. See the MFP documentation for instructions. If the Refresh option still does not find the MFP, add the MFP manually. See the Administration Console Help for instructions.

Why am I unable to add MFPs?

There may not be sufficient licensing available to support the MFPs you want to add. Deactivate or remove MFPs from the available devices list or purchase a license for additional devices.

Why do shortcuts not appear on the Kyocera MFP?

Before you can see shortcuts on the MFP, install and start the Kofax Front Office Server client software on the Kyocera MFP. See [Installing the Kofax client software](#) for instructions.

I entered my user name and password correctly at the MFP. Why am I unable to log on?

The MFP may not be able to retrieve authentication information if the connection to Kofax Front Office Server is down. Make sure that the MFP is connected to the network and Kofax Front Office Server is running.

When I start the Kofax client software on the MFP, an error indicates that the device is unlicensed.

The device may have been deactivated or removed in Administration Console. Run the Administration Console and make sure that the MFP is listen on the Added Devices tab.

The Kofax front panel displays only a limited number of buttons. Where are the rest of the buttons?

Add buttons by creating global or group shortcuts with the Administration Console. Then, associate the shortcuts to device profiles. Make sure the device profile is configured to display the appropriate buttons. When the MFP retrieves the device profile, the buttons should appear.

You can also create your own personal shortcuts using Thin Client. Personal shortcut buttons appear after logging on.

When I send a job from the device, I get an "Unable to connect to the server" error. Does this mean the job is lost?

If the connection to the server is interrupted while a job is being sent, it will resume and be sent successfully when the connection is restored.