

Kofax Front Office Server

Administrator's Guide for Lexmark MFPs

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The logo for Kofax, consisting of the word "KOFAX" in a bold, blue, sans-serif font.

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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 the applicable procedures for these devices, 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.

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 features are available with the Kofax Front Office Server app 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.

- 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.

On eSF devices, you can use the split login feature so that users do not have to provide a password to access the device or use their 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*	The job is waiting to be sent to the server.
Sending*	Sending the job from the device or from the configured FTP folder to the server.
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.
Pending Retry*	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.
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.

Status	Description
Deleted	User cancelled the transaction or deleted transaction from the inbox, or the administrator removed it during transaction review.

* Can be cancelled manually on devices. The number of attempts, the duration between retries 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.

- 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

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 app for the MFP, also 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.
- Upgrade the Lexmark MFP to Firmware 4 or later.

Installing Kofax Front Office Server on the MFP

You can install the Kofax Front Office Server app directly on the MFP. Before you begin, download the Lexmark client from Kofax Front Office Server Administration Console. See the Kofax Front Office Server Administration Console help for instructions.

Installing the app directly on the MFP

When installing the app directly on the MFP, installation of the Kofax Front Office Server app consists of the following processes:

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

Follow these steps to install the Kofax Front Office Server app on a single MFP.

1. Enter the URL for the MFP in your browser window.
2. On the **Device Status** page, click **Configuration** or **Settings**, depending on the model.
3. On the page that appears, select either of the following, depending on the model.
 - For Android models, click **Apps**.
 - For all other models, click **Embedded Solutions**, which is located under **Other Settings**.

4. 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 file that applies to your device.
 - KofaxLexmarkAndroidClient.flis: For Android Lexmark models.
 - KofaxLexmarkClient.flis: For all other Lexmark models.

Note If you are unable to use KofaxLexmarkClient.flis because of network bandwidth or disk space on the MFP, you can use KofaxLexmarkClient_compact.flis instead. This file contains all features except the Japanese keyboard. If either the KofaxLexmarkClient.flis or KofaxLexmarkClient_compact.flis file cannot be installed directly because of limitations on the device, you can install the client software by uploading it to the device as shown in [Uploading the client software file with FTP or embedded web server](#).

Locate the appropriate file in the folder where you downloaded and extracted the client software.

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**.
8. Continue the installation as shown in [Configuring the MFP to connect to Kofax Front Office Server](#).

Configuring the MFP to connect to Kofax Front Office Server

1. On the MFP, 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 client software 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 client software as follows:

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

The **State** column indicates **Running**.

After closing the page, a Kofax button appears on the MFP Home screen.

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.

Removing the App Directly on the MFP

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

Important Make sure that scan jobs have been completed before removing the client software. The removal process stops the client software. Jobs that were not completed and received can be lost.

1. 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 client software is removed from the list of installed solutions.

Upgrading Kofax Front Office Server on the MFP

To upgrade Kofax Front Office Server on the MFP, remove the app as shown in [Removing the App Directly on the MFP](#) and then install the new version as shown in [Installing the app directly on the MFP](#).

Support for single sign on

Kofax Front Office Server supports single sign on for users who are also registered users on the Lexmark MFP. Users who log on to the MFP are also logged on automatically to Kofax Front Office Server. This feature supports BluePrint, Lexmark, and other card validation methods.

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.

If the logged on user is a domain user, use this setting in the Administration Console by selecting **Settings > Advanced**.

- Namespace: mfp.lexmark.properties
- Name: sso.activedirectory.domain

- Value: The domain associated with the authenticated MFP user.

Configuring split login (eSF devices only)

Split login enables you to configure an MFP so that a user does not need to provide a password to access the device or shortcuts. At the same time, the device authentication with the server is preserved.

When split login is enabled, the following occurs:

- When users tap Log On on the device, they are prompted for their user name but not their password.
- When users tap on a personal shortcut, they are also not prompted to enter a password, unless it is a DCNJ shortcut or a shortcut configured so that a password is required.

A password is required the first time you use an MFP when Require Authentication for Device Registration is enabled in Devices. When authentication is successful, the device is registered. If split login is enabled, users are not prompted for a password unless required for a shortcut. If the device is configured for single sign-on (SSO) with the server, a password is not required.

Follow these steps to configure split login in Kofax Front Office Server. See the help for more details.

1. Configure the process so that it uses split login.
 - a. In Kofax Front Office Server Designer, open the process and select the activity you want to configure.
 - b. Open the **Extended Properties** for the activity.
 - c. Click **Advanced**.
 - d. Set the **MFP Ready** field to **MFP Only - No Password Required**.
 - e. Accept the changes and complete your changes to the process.
2. Configure the device to use split login.
 - a. In Kofax Front Office Server Designer, select **System Settings > Devices**.
The Devices application appears in a browser window.
 - b. Select **Device Profiles**.
 - c. Select the **General** tab, if it has not already been selected.
 - d. In the **Logon** field, select **Allow Split Login**.
 - e. Associate the devices with the profile and make any desired setting changes.
 - f. Save the profile.

Device profiles updates

When a device profile associated with an MFP changes, the changes are reflected on the front panel of the MFP when it polls Kofax Front Office Server. This poll occurs when the Kofax Front Office Server

client software 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.

Additional information

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

Uploading the client software file with FTP or embedded web server

If the client software cannot be installed directly on the MFP, upload it to the device using FTP. If FTP is not available, you can use the Embedded Web Server (EWS). You can upload either `KofaxLexmarkClient.flx` if you have sufficient drive space or `KofaxLexmarkClient_compact.flx` if you have limited drive space and do not require the Japanese keyboard.

Before you begin, make sure you have downloaded the Lexmark client from Kofax Front Office Server Administration Console and extracted the `.flx` files to a folder on your computer.

To upload using FTP, do the following:

1. Run an FTP client program and put the session in binary mode.
2. Connect to the Lexmark MFP using its IP address or host name.
3. Upload the `.flx` file to the device.

If you need to use EWS, do the following:

1. In EWS, click **Settings > Update Firmware**.
2. Click **Choose File**.
3. Select the `.flx` file.
4. Click **Submit**.

The client software file is installed.

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.

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.