Kofax Invoice Automation

Web API Install Guide

Version: 6.0.2

Date: 2019-05-09

KOFAX

Legal Notice

Table of Contents

Introduction

Kofax Invoice Automation Web API makes many of the API methods that are available in Kofax Invoice Automation 6.0.2 or later available to other applications.

This guide covers the installation and configuration of the Invoice Automation Web API in connection with Kofax Invoice Automation 6.0.2 or later.

Related documentation

A full set of the documentation can be found online here: https://docshield.kofax.com/Portal/Products/en_US/KIA/6.0.2-9nw1fk802p/KIA.htm

In addition to this guide, the Kofax Invoice Automation documentation set contains the following relevant documents:

Kofax Invoice Automation Installation Guide (`KIA_Installation_Guide.pdf`) provides information on how to install Kofax Invoice Automation .

ReadSoft Invoices System Configuration Guide (`KIA_Technical_Specifications.pdf`) provides some information concerning system requirements.

The Web API Developers Guide (`KIA_WebAPI_Dev_Guide.pdf`) provides information and examples on how to use the available API methods with other applications.

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.

Prerequisites

The following items must be done before installing Kofax Invoice Automation Web API:

- Kofax Invoice Automation 6.0.2 or later must be installed on the server. See *Kofax Invoice Automation Installation Guide* for more information.
- An Invoice Automation database must be cerated and available to the server. This can be on the server on with Kofax Invoice Automation 6.0.2 is installed, or it can be located on a different server. For the sake of this manual, the name of the example database is INV_60. See *Installing and Configuring Microsoft SQL Server* for information on how to do this.
- A user must be created on the server where Invoice Automation Web API is intalled. The example user for this guide is *InvoicesService*. See below.
- A SysAdmin resource needs to acquire and install an SL certificate on the server where Invoice Automation Web API is installed. The name of the certificate should be *InvoicesServiceCert*. See below.
- Ensure the server has a supported operating system:
  - Windows 7 SP1 or later
  - Windows Server 2008 R2 SP1 or later

Create the InvoicesService user for the Web API

The user name defined here is used later in the installation process when the components are configured. *InvoicesService* is the name specified in the following example.

1. Open the **Computer Management** console on the computer where Kofax Invoice Automation Web API is intalled.
2. In the navigation pane to the left, expand **Local Users and Groups**, right-click **Users**, and select **New User**.
3. Type *InvoicesService* in both the **User name** and **Full name** boxes.
4. Specify and confirm the password for the user.
5. Deselect **User must change password at next logon** and select **Password never expires**.
6. Click **Create**.

The system adds the *InvoicesService* user to the list of users.

Acquire and install an SSL certificate for the web sites

The websites created by the installation process require an SSL certificate in the domain to be able to access the web sites created by the installation process in the domain. If the person installing the Web API does not manage SSL certificates for the domain, they need to ask the person who does to acquire

the certificate and install it on the server. The name of the certificate for the example in this manual is *InvoicesServiceCert*.

Enable WebSocket protocol

The WebSocket protocol must be activated on the machine where Web API is running. The operating system determines how it is activated.

For example, do the following to activate the WebSocket Protocol on Windows Server 2012:

1. Open the Server Manager and click **Manage** > **Add Roles and Features** to the right on the screen.
2. Select **Role-based or feature-based installation** and click **Next**.
3. Select the appropriate server (your server is selected by default), and click **Next**.
4. In the **Roles** tree, select **WebSocket Protocol** under **Web Server (IIS)** > **Web Server** > **Application Development** and click **Next**.
5. If no additional features are needed, click **Next**, and then click **Install**.
6. When the installation is complete, click **Close to exit the wizard**.

Web API installation instructions

The core components listed in the system requirements are installed first if they are not found on the computer. Invoice Automation Web API is then installed. It consists of three components that come up automatically one after the other in the installation.

- Invoice Automation Identity Server
- Web API Server
- Invoice Automation Web Client

Complete the following steps to install the various parts.

1. Download the Invoice Automation Web API installation package, *InvoicesAPISetup.exe*, from the Kofax customer portal. You will need to log in to access the file.
2. Double-click the file to start the installation.
3. Core components are installed first if they are not found on the system. Click **Install** and **Close** or **Finish** to install each pre-component.
4. Continue with the next section.

Install the Invoice Automation Identity Server

1. Click **Next** when the **Welcome to the Invoice Automation Identity Server Setup Wizard** dialog displays.
2. In the **Destination Folder** dialog, specify where you want to install the identity server (or accept the default location), and click **Next**.
3. Specify the following settings in the **Database settings** dialog and then click **Next**.
   - The name of the server where the database is located (use a period "." if the installation is on the same computer.
   - The database instance name (if applicable)
   - The name of the database that was created for this purpose (*INV_60*, for this example).
4. Specify the following settings in the **Web site** dialog and then click **Next**.
   - The appropriate **Port** setting (2102 is used in this example).
   - Under the **Certificates** box, select the **IdentityServerCert** web certificate that was created previously.
   - Specify the desired location for the associated log, if different than the default location.
   - Ensure **Create website** is selected.
5. In the **WebAPI and Web Client settings** dialog, replace "localhost" for both **WebApi server url** and **Web Client url** with the corresponding IP address of the server so that the sites can be accessed from other computers.

6. Specify the following settings in the **User credentials** dialog and click **Next**.
   - **Domain name** (if the user is found on a domain that is different than the server on which you are installing the identity server)
   - **User name** - the user that was created previously above (*InvoicesService*, in this example)
   - **Password** - the password associated with the specified user account.
7. Click **Install**.
8. Click **Finish**.
9. Continue with the next section.

Install the Web API Server

1. Click **Next** when the **Welcome to the Web API Server Setup Wizard** dialog displays.
2. In the **Destination Folder** dialog, specify where you want to install the web API server, and click **Next**.
3. Specify the following settings in the **Database settings** dialog and then click **Next**.
   - The name of the server where the database is located (use a period "." if the installation is on the same computer).
   - The database instance name (if applicable)
   - The name of the database that was created for this purpose (*INV_60*, for this example).
4. Specify the following settings in the **Web site** dialog and then click **Next**.
   - The appropriate **Port** setting (54051 is used in this example).
   - Under the **Certificates** box, select the **IdentityServerCert** web certificate that was created previously.
   - Specify the desired location for the associated log, if different than the default location.
   - Ensure **Create website** is selected.
5. In the **Identity Server and Web Client settings** dialog, replace "localhost" for both **Identity server url** and **Web Client url** with the corresponding IP address of the server so that the sites can be accessed from other computers.
6. Specify the following settings in the **User credentials** dialog.
   - **Domain name** (if the user is found on a domain that is different than the server on which you are installing the identity server)
   - **User name** - the user that was created previously above (*InvoicesService*, in this example)
   - **Password** - the password associated with the specified user account.
7. Click **Next**.
8. Click **Install**.
9. Click **Finish**.
10. Continue with the next section.

Install the Kofax Invoice Automation Web Client

1. Click **Next** when the **Welcome to the Kofax Invoice Automation Web Client Setup Wizard** dialog displays.
2. In the **Destination Folder** dialog, specify where you want to install the web client, and click **Next**.
3. In the **Kofax Invoice Automation Web Client settings** dialog, replace "localhost" for both **Web API url** and **Identity Server url** with the corresponding IP address of the server so that the sites can be accessed from other computers. Ensure that **Create website** is also selected. Then click **Next**.
4. Click **Install**.
5. Click **Finish**.
6. Click **Close**.

Chapter 4

Post-installation configuration

Perform the following actions after Kofax Invoice Automation Web API is installed.
- Create a database user for the Web API
- Give the database user permissions to check performance counters
- Configure the bindings for the Web API web sites
- Adjust Firewall security settings
- Test the web application

Create a database user for the Web API

1. Open Microsoft SQL Server Management Studio as an administrator on the computer where the database is located.
2. Click **Connect** in the **Connect to Server** dialog.
3. In the navigation pane to the left, expand **Security**, right-click **Logins**, and click **New Login**.
4. Click **Search**, type *InvoiceService* in the **Enter the object name to select** box, and click **Check Names**. The search finds the name including the name of the localhost.
5. Click **OK**.
6. Click **User Mapping** in the navigation pane of the **Login - New** dialog.
7. Select the Kofax Invoice Automation database in the list under **Users mapped to this login** (*INV_60* for the sake of this example).
8. In the **Database role membership for: INV_60** settings box, ensure **db_owner** is selected.
9. Click **OK**.

Give the database user permission to check performance counters

The database user needs permission to check performance counters.
1. Open the **Computer Management** console on the server where the database is located.
2. Expand **Local Users and Groups** and double-click **Performance Monitor Users** to open it.
3. Click **Add**, type *InvoicesService* in the **Enter the object names to select** box, and click **Check Names**.
4. When the user is found, click **OK** twice.

Configure the bindings for the Web API web sites

1. Open Microsoft Internet Information Services (IIS) Manager.
2. In the **Connections** pane on the left, expand the name of the localhost found directly under **Start Page** (starts with WIN-...) and then expand **Sites**.
3. Select **Default Web Site** and then click **Bindings** in the **Actions** pane to the far right in the window.
4. In the **Site Bindings** dialog that displays, click **Add**.
5. Select **https** under **Type**. The port number changes to **443** and the **SSL certificate** setting appears.
6. Under **SSL certificate**, select the certificate that was created for Kofax Invoice Automation Web API (**IdentityServerCert**).
7. The row containing the binding setting for port 80 can be removed.
8. Click **OK** and then **Close**.
9. Under **Sites** again, select **Identity Server** and then click **Bindings** in the **Actions** pane to the far right in the window.
10. In the **Site Bindings** dialog that displays, select the binding for the port specified previously for the identity server (2102 in this example), and click **Edit**.
11. under **SSL certificate**, select the certificate that was created for Kofax Invoice Automation Web API (**IdentityServerCert**).
12. Click **OK** and then **Close**.
13. Under **Sites** again, select **Invoices Web API** and then click **Bindings** in the **Actions** pane to the far right in the window.
14. in the **Site Bindings** dialog that displays, select the binding for the port specified previously for the Web API server (54051 in this example), and click **Edit**.
15. under **SSL certificate**, select the certificate that was created for Kofax Invoice Automation Web API (**IdentityServerCert**).
16. Click **OK** and then click **Close**.

Adjust Firewall security settings

Open the appropriate ports to allow access to the Web API web sites through the firewall.

1. On the computer where the Web API is installed, start **Windows Firewall with Advanced Security** component.
2. In the navigation pane on the left, click **Inbound Rules**, and in the **Actions** pane on the right, select **New Rule**.
3. Select **Port** as the **Rule Type**, and click **Next**.
4. In the **Protocol and Ports** dialog, select **TCP** and in the **Specific local ports** box, type the port numbers specified earlier (*2102*, and *54051* for this example). Click **Next**.
5. Click **Next** in the **Action** dialog and **Next** in the **Profile** dialog.
6. In the **Name** box on the **Name** dialog, type *InvoicesAPI*, and click **Finish**.

Test the web application

1. Open the browser and in the address field, type the URL to the Invoice Automation Web API including the IP address in the format `https://123.45.6.78/invoicesapi/invoices` and press **Enter**.

2. Users will normal log in using their user account information that is defined in Kofax Invoice Automation, but for testing purposes, you can log in with the *admin* user account as long as the default password for it in Kofax Invoice Automation is changed to something else such as *secret2*.

Troubleshooting

If the web application does not work, check the following items.

Start the Web API as an administrator

1. In Windows Explorer, navigate to `C:\Program Files\Kofax\Invoices\WebAPI` and start the program `INVOICESWebApi.exe`.
2. A command window opens and the application runs. Close the window when the action is complete.

Check the ImageOverridePath in appsettings.json

1. In Windows Explorer, navigate to `C:\Program Files\Kofax\Invoices\WebAPI` and start the program `INVOICESWebApi.exe`.
2. Ensure the following string includes the path to the image file.

   `"ImageOverridePath": "",`, such as `"ImageOverridePath": "C:\\InvoicesImg\\ident",`

   > **Note** The path must include double backslashes (\\) between folders.

3. Save the file.

Acquire and install an SSL certificate for the web sites

The web sites created by the installation process require an SSL certificate in the domain to be able to access the web sites created by the installation process in the domain. If the person installing the Web API does not manage SSL certificates for the domain, they need to ask the person who does to acquire the certificate and install it on the server. The name of the certificate for the example in this manual is *InvoicesServiceCert*.