Kofax Import Connector 2.1.0



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Welcome

Welcome to the Kofax Import Connector - Message Connector Help.

For more information about using Help, see <u>Using Help</u>.

Common Starting Points

The following links provide general information about this product:

- Configuring Message Connector
- Monitoring Message Connector

Using Help

This online Help system includes a description of Message Connector user interface. To access Message Connector Help, click Help.

Locate information in Help by selecting one of the tabs described in this topic.

Contents Tab

The Contents tab shows an outline of the Message Connector Help contents. Book icons indicate a major topic and expand to subtopics. The topic you select appears in the right pane (the pane in which you are reading this text).

Index Tab

The Index tab shows a list of keywords. Each keyword is associated with one or more Help topics. When you click a keyword, a topic appears in the right pane.

Search Tab

On the Search tab, you can use full-text search to locate words and phrases. For example, if you type "fast scan" in the search box and then click Search, all topics containing "fast scan" display in the list. Click a topic in the list and it appears in the right pane with all instances of the word(s) highlighted.

Printing Help Topics

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Once a Help topic is opened, you can use the Print option from your browser to print a hardcopy on the printer that is connected to your computer. You can print one topic at a time.

Configuring Message Connector

This topic describes how to use the Message Connector configuration utility.

Start the configuration tool by the Message Connector Configuration shortcut from the Kofax Import Connector group in the Windows Start menu.

Alternatively, you can start configuration from the Message Connector Monitor tool by clicking Configuration Tool.

The configuration parameters are organized into several tabs. The most important tabs are listed on the top of the page. They are expanded by default.

Use **Expand** ■ and **Collapse** ■ buttons to expand and collapse tabs of parameters.

Click **Save** to save the configuration and close the configuration utility. The <u>Exiting</u> Configuration window is displayed.

Click Exit to close the configuration utility without saving.

Use **Advanced** and **Basic** buttons to display or hide advanced configuration settings. Basic settings are configured in the following tabs:

- General Tab
- Document Conversion Tab
- Structured (XML) Input Handling Tab
- Email Inbound via SMTP Tab
- Email Outbound Tab
- Web Service Input Tab
- SSL Certificate Tab

Advanced settings are in these tabs:

- Security Options Tab
- List of Call Peers Tab
- VoIP/FoIP Network Tab
- Voice Codecs Tab
- Fax Tab
- H.323 Signaling Tab
- SIP Signaling Tab
- HTTP Tab
- Trace Settings Tab

Using Remote Configuration

Remote configuration allows you to configure Message Connector from any computer in the network.

- 1 Start a web browser and connect to Message Connector Monitor web site, e.g. "https://messageconnector:25086/file/index.html". For more information about the monitor, refer to Monitoring Message Connector.
- **2** Click **Configuration Tool**. The Remote Configuration Tool window is displayed.
- 3 Click View/Edit Configuration.
- **4** Perform the configuration changes. Refer to <u>Configuring Message Connector</u>.
- **5** Click **Save** to return to the Remote Configuration Tool window.
- **6** Click **Restart service** to make the changes effective.

Exiting Configuration

This task applies to local configuration only.

Click one of the following buttons to conclude configuring Message Connector

- Go back to edit configuration: Click to return to the main window of the configuration utility.
- **Exit and restart service**: Click to exit the configuration utility. The Message Connector service is restarted and new configuration is applied immediately.
- Exit configuration: Click to exit the configuration utility. The Message Connector service is not restarted; i.e., any changes in configuration are not applied until you restart the service.

General Tab

This tab lists the most important parameters of Message Connector.

Own Fax Number: Type your fax over IP number, i.e. the Called Station Identification (CSI) for incoming fax calls. Should contain only digits, the plus symbol character (+) and blanks. This value is usually displayed on the fax machine that sends fax messages to Message Connector.

Operator Email: Type a valid email address of an operator. Inbound messages that could not be imported into Kofax Capture are forwarded to this email address. Leave empty to disable forwarding.

Email From: This email address is displayed in "From" field of messages forwarded to operator.

Keep Failed: Failed inbound documents are those not imported into Kofax Capture and also not forwarded to an operator. If selected, failed inbound documents are kept pending. These pending documents have to be handled and deleted manually; otherwise, the storage will eventually run out of disk space.

Storage Size: Size of disk space in MB reserved for storage of documents. The default value is 100 MB. You can type any value between 10 and 64000 MB. If you want to decrease the storage size, the storage file has to be deleted manually; all stored documents will be lost.

Storage File: Storage file name and location. The default path is the common application data folder, subfolder Kofax\MC\; the default file name is "Storage.bin". The uninstallation process removes only storage files in the default location.

Prefetched Messages: Number of documents prefetched from mail boxes, folders and other passive inputs to Message Connector storage. Minimum number is 1, maximum 100.

Own Computer Name: Specify the name of the computer where Message Connector is installed. This parameter is important for SMTP and web service connections.

- When using SSL, remote server might need this parameter.
- When multiple Message Connectors run in a cluster, this parameter has to contain the name of the cluster, not individual computers.

Load Balancer Support: Specify which load balancers should be supported. The default value supports both Windows NLB and external NLB. Usually you don't need to change this parameter.

Document Conversion Tab

This tab lists the parameters that determine what tools to use for document conversion.

The conversion tools must be installed on the same computer as Message Connector. These tools are not a part of Kofax Import Connector installation package. Customers must provide any licenses required for third-party software.

Enable Decompression: Select if you want to enable decompression of compressed documents (zip, rar, 7z, tar, gzip).

MS Office Documents: Select the tool you want to use for converting Microsoft Office documents to PDF.

MHTML and HTML Documents: Select the tool you want to use for converting HTML documents to PDF .

MS Office User: Select a Windows user account for Microsoft Office DCOM automation (necessary for document conversion via Microsoft Office). Only required on Windows Server 2008, Windows Vista or later operating systems.

- "Interactive user" means that the user must be logged in on the Message Connector computer. During document conversion, you can observe Office windows opening and closing. This mode is useful for advanced troubleshooting.
- "Current configuration" means that Office applications should start with the user account which is specified in DCOM Config tool.
- "This user:" allows you to type a name and password directly.

Name: Type a Microsoft Office DCOM user name; for productive mode with no one logged in it is necessary to specify an administrator user.

Password: Type a Microsoft Office DCOM user password.

Custom Extension List: Type a blank separated list of extensions for file types that can be converted by a customizable script ("CustomToPdf.bat") to PDF. Refer to Kofax Import Connector Developers Guide for more information about this particular script and the scripting interface in general.

Note Document conversion can be completely disabled in the <u>Security Options Tab</u>.

Structured (XML) Input Handling Tab

This tab lists the parameters for configuring XML schema validation. Message Connector can be configured to reject received XML documents that cannot be validated against an XML schema. This feature is primarily useful for web service input, where the invalid document is immediately rejected and the web service sender is informed about the reasons (failed validation). However, it applies to documents from all connectors - non-valid XML are handled according to the settings in parameter "If Validation Fails".

Before schema validation, Message Connector checks if an XML document is well-formed. Documents that fail this check are also handled according to the settings in parameter "If Validation Fails".

Types: Type a comma or blank separated list of MIME types or file extensions that should be treated as XML documents for the purpose of automatic schema validation.

Schema Validation: Use this parameter to enable and control XML schema validation feature:

- Select Disabled if you don't want Message Connector to validate XML documents.
- Select Optional if you want validate those XML documents for which an XML type has been defined. Documents that have a defined XML type but are not valid are handled according to the setting of the "If Validation Fails" parameter.
- Select Required if you want to validate all XML documents (a matching XML type must exist). Documents that don't have a matching XML type as well as documents that fail validation are handled according to the setting of the "If Validation Fails" parameter.

If Validation Fails: Select how to handle XML documents that failed the validation check:

- Select "Do not apply XML handling" to treat the document as a non-XML document
- Select "Reject the message" to mark the document as invalid. Such documents are not imported to Kofax Capture. In case of web service input, the sender is immediately informed about the reason of rejection. Even invalid documents are temporarily stored in Message Connector for troubleshooting.

Email Inbound via SMTP Tab

This tab lists the parameters related to incoming email communication via SMTP. Work with your mail server administrator (e.g. Microsoft Exchange administrator) to configure these values.

Local IP Address: Type the IP address of the local interface used for SMTP input. If empty, all local interfaces are used. For Windows failover cluster deployments, use the IP address of the cluster.

SMTP Port: Type the port for incoming SMTP messages.

SSL Active: Select if / when to use SSL for inbound email communication. See also <u>SSL</u> Certificate Tab.

Note Inbound SMTP email can be completely disabled in the Security Options Tab.

Email Outbound Tab

This tab lists the parameters related to outgoing email communication. Your mail server administrator should be able to provide these information. Kofax Import Connector needs to support outgoing emails in two situations (depending on configuration):

- To inform an operator about failed messages that cannot be imported to Kofax Capture
- To send notification messages to the originator of incoming email messages.

SMTP Server Mode: Specify how to locate the outbound SMTP server:

- Auto Mode (MX record) use mail exchanger records in the DNS to automatically identify the SMTP server (according to the host part of the email address)
- Smart Host (A record) use address records
- Smart Host (hosts file) use local hosts file

SMTP Smart Host: If you are not using the auto mode, you must type the SMTP host for outgoing email messages (domain name or IP address).

TCP Port: Type the port on SMTP host for outgoing messages.

User ID: Type the user name needed for authentication with the SMTP host.

Password: Type the password needed for authentication with the SMTP host.

SSL Active: Select if / when to use SSL for outgoing email communication. See also <u>SSL</u> Certificate Tab.

Note Outbound emails can be completely disabled in the Security Options Tab.

Web Service Input Tab

This tab lists the basic parameters for importing files via web services.

Local IP Address: Type the IP address of the local interface used for web-service input. If empty, all local interfaces are used. For Windows failover cluster deployments, use the IP address of the cluster.

HTTP Port: Type the port used for web-service input without TLS (HTTP). Use "0" to disable input without TLS.

HTTPS Port: Type the port used for web-service input with TLS (HTTPS). Use "0" to disable input with TLS.

KC Plug-In URL: Type the URL of the web service interface of KC Plug-In. Message Connector needs this connection for web service input, to retrieve information from Kofax

Capture (required for GetContentTypeList and GetContentTypeDescription web service calls).

MC Cluster Enabled: Multiple Message Connectors may be used for web-service input via network load balancing (NLB) in order to increase the message throughput. Select this checkbox to enable MC cluster mode. Cluster mode is only required if you want to check the status of a document that you have previously sent via web service and NLB. Different Message Connectors must be able to communicate to determine the status of a document.

Local MC Cluster IP Address: Specify the IP address of local interface used for web-service input. This parameter is required for cluster mode. If you are using an active-active Windows cluster with NLB, specify the IP address of the cluster. For more information about active-active deployments, refer to *Kofax Import Connector Installation Guide*.

MC Cluster Members: Specify the IP addresses of the members of a MC cluster (separated by comma or space).

MC Cluster Port: Specify the TCP/UDP port used for internal communication between cluster members.

Note Web service input can be completely disabled in the <u>Security Options Tab</u>.

SSL Certificate Tab

This tab lists SSL certificate and key parameters. Message Connector comes with a default certificate. For security reasons, you should change the values in this tab. Enter the values in Base64 encoding, including BEGIN and END lines.

See also <u>Email Inbound via SMTP Tab</u>, <u>Email Outbound Tab</u> (basic configuration), and <u>HTTP Tab</u> (advanced configuration) to enable or disable SSL for a particular type of communication.

SSL Certificate: Enter your SSL server certificate.

SSL Private Key: Enter the private key of the certificate above.

SSL Chain Certificate: Optionally, enter an intermediate certificate in the certificate chain to a well-known root certificate.

Advanced Settings

Security Options Tab

This tab allows to disable or restrict certain functions of Kofax Import Connector. Use this tab if you want to increase the security of your software. The various parameters to disable features can save system resources because disabled features are not running.

Users: Specify if you want to enable user access control to Message Connector monitoring and configuration interfaces.

- View user can view documents in Message Connector.
- Process user can view and manage documents (delete, reactivate, etc.). This user is also used by KC Plug-In to import documents from Message Connector.

Admin user can additionally perform remote configuration.

Admin Password, Process Password, View Password: Type the passwords for these users.

Disable Remote Config: Select to disable remote configuration completely for enhanced security.

Disable Document Converter: Select to completely disable document conversion and image normalization. If document conversion is configured for a particular incoming document, the document may still be imported in Kofax Capture without conversion (depending on the KC Plug-In settings of the destination (Advanced tab).

Disable SMTP Server: Select to disable the function of Message Connector as an SMTP server. It will no longer accept incoming email messages.

Disable POP3/IMAP: Select to disable the polling of POP3 and IMAP mailboxes.

Disable EWS: Select to disable the polling of EWS mailboxes.

Disable Email Outbound: Select to disable output emails. Outbound emails are required for emails to operator (about failed messages) and notification emails.

Disable FoIP: Select to disable the internal fax over IP in Message Connector.

Reject unknown call-peers: Select to accept inbound fax calls only from the configured call peers.

Disable KCS: Select to forbid connections to Kofax Communication Server.

Disable RightFax: Select to forbid connections to a RightFax server.

Disable Biscom: Select to forbid connections to a Biscom server.

Disable Web Service Input: Select to stop Message Connector from accepting incoming documents via web service interface.

Disable Folder Input: Select to disable input from folders.

Folder Input Base Directory: Type the root directories for folder input (one directory per line). You can configure specific folders for input in Kofax Capture Administration; all these folders must be below the base directories. This is mostly a security measure to prevent folder input from important system folders. It is recommended to make this as specific as possible to prevent damage (e.g., folder input from C:\Windows\\ is usually a bad idea). You can specify a local or network path (UNC syntax).

Disable Archiving: Select to disable the folder archiving function.

Archiving Base Directory: Restrict folder output to a particular directory. You can specify a local or network path (UNC syntax).

Archiving User: Specify the user who can access the archive folder, either as <user> or <domain\user>. Keep the field empty to use the Network Service user.

Archiving Password: Specify the password of the folder output user. Password is ignored if the user name is empty.

List of Call Peers Tab

This tab allows you to define connection to call peers required for FoIP, i.e. fax servers, gateways, and other T.38 compatible devices (including e.g. Cisco CallManager).

Enabled: Select to enable the call peer.

Protocol: Lists the possible signaling protocols (H.323, SIP, H.323 with RAS, or SIP with registration). Select a protocol compatible with your call peer. If you select an H.323 Gatekeeper ("H.323 with RAS") you must not use H.323 with any other active call peer.

Remote Address: Enter the remote IP address or host name of the call peer (Gateway, Gatekeeper, Registrar or CallManager) and the relevant signaling port number. This parameter supports host names for H.323 only.

Authorization: Enter the user name and password for authentication with an H.323 gatekeeper or a SIP server.

Reg. Numbers: A number to be registered at an H.323 gatekeeper or SIP registrar. When the parameter Registration Type in the H.323 Signaling tab is set to "Gateway", the number is interpreted as a prefix. When the Registration Type is set to "Terminal", FoIP registers as a terminal with this number at the gatekeeper.

VoIP/FoIP Network Tab

This tab allows to configure additional fax/voice over IP parameters.

Local IP: Specify which local IP address should be used for FoIP network. Empty means all available networks are used.

Ports Lower Limit: Specify the lower limit of port range for voice/T.38 media data (must be greater than 1023).

Ports Upper Limit: Specify the upper limit of port range for voice/T.38 media data (must be less than 65536).

Enable QoS: Select to specify Quality of Service value.

QoS for signaling: Specify the Quality of Service value for signaling packets (H.323/SIP).

QoS for T.38: Specify the Quality of Service value for T.38 packets.

Voice Codecs Tab

This tab allows to configure voice codecs.

Nr: Use the arrow buttons to control codec priority.

Enabled: Select to enable a particular codec.

Codec: Select one of the supported codecs.

Max. Packet Interval: Select maximum time between data packets.

Fax Tab

This tab lists advanced fax protocol parameters.

Outbound T38 Mode: Defines how to switch to T.38 mode during outbound calls. The following three options are available:

- Start with G.711 audio mode. Switch immediately to T.38 mode
- Send one CNG tone as G.711 audio and then switch to T.38 mode
- Repeat sending CNG tone as G.711 audio until Gateway switches to T.38 mode

The first option is the default. It has the best performance and requires the lowest bandwidth. If you cannot transmit a fax in your environment, try the other modes. The second mode and third mode improve interoperability in case of manual call transfer to/from FoIP. These modes are better for test calls with T.38 incompatible devices (e.g., a SIP telephone). The third mode works only if the used gateway initiates a switch to T.38 after it detects fax signal.

Inbound T38 Mode: Defines how to switch to T.38 mode during inbound calls. The following three options are available:

- Start with G.711 audio mode. Switch immediately to T.38 mode
- Send one CNG tone as G.711 audio and then switch to T.38 mode
- Repeat sending CNG tone as G.711 audio until Gateway switches to T.38 mode

The first option is the default. It has the best performance and requires the lowest bandwidth. If you cannot transmit a fax in your environment, try the other modes. The second mode and third mode improve interoperability in case of manual call transfer to/from FoIP. These modes are better for test calls with T.38 incompatible devices (e.g., a SIP telephone). The third mode works only if the used gateway initiates a switch to T.38 after it detects fax signal.

Enable V.34: Enable support for V.34 fax (high speed fax). If the check box is cleared, V.34 fax is disabled. This check box also enables the support of T.38 version 3, which is a requirement for V.34 operation. Unfortunately, T.38 version 3 uses a different encoding which is not correctly displayed by current releases of Wireshark Network Protocol Analyzer (tested with 1.0.7).

Enable ECM Reception: Select to enable T.30 Error Correction Mode (ECM) for incoming messages.

Bearer Capability: Q.931 bearer capability for outgoing calls (0 - Speech, 16 - 3.1 KHz Audio).

H.323 Signaling Tab

This tab lists advanced fax over IP settings for the H.323 protocol.

Local H.323 Port: Defines the local H.323 signaling port.

Registration Type: Type of gatekeeper registration (terminal/gateway) where the type gateway is required if you want to support multiple inbound numbers.

Zone ID: Optional zone ID used for gatekeeper registration as gateway.

SIP Signaling Tab

This tab lists advanced fax over IP settings for the SIP protocol.

Local SIP Port: Defines the local SIP signaling port.

HTTP Tab

This tab lists advanced settings of the Message Connector web portal.

Local IP Address: Specifies the IP address of local interface used for Message Connector web portal. All local interfaces are used if this parameter is left empty.

Local Port: Specify the port number of the web portal.

SSL Active: If selected, secure connection to web portal is enabled.

Trace Settings Tab

Use this tab to configure log files and traces.

Single Process: If checked, all components of the application are running in the same process.

Trace Level: General trace level:

- 0 = Off
- 10 = Very rare tracing that happens only during initialization / startup.
- 20 = Low trace data per document. Less trace output with productive systems.
- 40 = More intense tracing. Productive use is possible but trace files can be large.
- 60 = Restricted performance for productive use (max. 10 channels recommended).
- 100 = Extensive tracing for troubleshooting. Operating multiple channels can fail.
- More than 100: Reserved for third level support

Message Trace Size: Message size limit in bytes to trace traffic between components:

- 0 = Off
- 1 = Single line per message
- More than 1 = Size limit in bytes

Trace MIME Messages: If enabled, received email messages are stored in the same folder as the Message Connector log files.

OpenH323 Trace Level: Open H323 library trace level (0..255): 0 = off, higher values give a more detailed trace.

Trace Location: Type the drive and path of the trace location.

Size of Trace File: Maximum size of trace files in KB

Number of Trace Files: Maximum number of generated trace files.

Append Trace: Check to append to existing traces after application is restarted.

Monitoring Message Connector

This topic describes how to use the Message Connector monitoring utility.

Kofax Import Connector administrators can use this tool:

- in the deployment phase, to send test messages and to test document conversion
- during regular operation, to manage failed messages and files in the storage.

Kofax Support can use this tool for troubleshooting:

 to display the state of Message Connector's internal components and connections, and their configuration.

Start the monitoring tool by the Message Connector Monitor shortcut from the Kofax Import Connector group in the Windows Start menu.

On the menu, select the desired task:

- Component | Status: Displays the monitoring window with status information about the Message Connector. See <u>Status Monitor</u>.
- Component | Status | Fax Calls: Displays fax call peer statistics. See FoIP Calls Statistics.
- Component | Status | Passive Inputs: Displays communication statistics for email and fax server connections. See Passive Inputs.
- Component | Status | License: Displays license information. See <u>Licenses</u>.
- Component | Status | MC Cluster: Displays the status of connections to remote Message Connectors in case of MC cluster. See MC Cluster.
- Component | Test Fax: A test fax message is sent by Message Connector. See Test Fax.
- Component | Test Email: A test email message is sent by Message Connector. See <u>Test</u> Email.
- Component | Find by ID: Search for a document. See Find Document by ID.
- Component | Convert document: Allows to test document conversion. See <u>Convert</u> <u>Document.</u>
- Component | Configuration Tool: Starts the configuration tool. See <u>Using Remote Configuration</u>.
- Inbound Status | Active: Shows messages received by Message Connector waiting to be delivered to Kofax Capture. See <u>Storage</u>.
- Inbound Status | Active | Failures: If the configuration setting Keep Active is selected, shows messages that have not been delivered to Kofax Capture. See <u>Storage</u>.
- Inbound Status | Processed: Shows processed messages (messages delivered to Kofax Capture and, depending on the configuration, messages that could not be delivered). See <u>Storage</u>.

- Inbound Status | Processed | Failures: Shows messages that could not be delivered to Kofax Capture. See <u>Storage</u>.
- Outbound Status | Active: Shows test fax messages and email notification messages that are queued for sending or are currently being sent. See <u>Storage</u>.
- Outbound Status | Processed: Shows sent (successfully or not) test fax messages and email notification messages. See <u>Storage</u>.
- Outbound Status | Processed | Failures: Shows test fax messages and email notification messages that could not be sent. See <u>Storage</u>.

Status Monitor

This status page is displayed automatically when you start the Message Connector monitoring utility. You can also display it again by clicking **Status**.

The table lists Message Connector's internal components. It shows basic state of each component, along with elementary statistics (if appropriate). Click **Refresh** to update the table. Click **ShowConfig** to display the configuration of each component.

FoIP Calls Statistics

This page is displayed when you click **Fax Calls** on the menu. Use this page if you want to view the statistics of calls on each configured fax over IP call peer.

The Last State column displays the last known state of each enabled call peer:

- Unknown (white): the call peer has not been used yet
- OK (green): last call via the call peer has been successful
- No Channel (yellow): in the last call attempt, the call peer was online but it had no free channels
- Unreachable (red): call peer unreachable, e.g., network down

The Active Calls column shows the number of active calls: outgoing pending (e.g., alerting the called party), outgoing connected, and incoming connected.

The Processed Calls column shows the number of processed calls: outgoing failed (i.e., calls that failed to connect), outgoing OK, and incoming OK.

Passive Inputs

This page is displayed when you click **Passive Inputs** on the menu. Use this page if you want to view the statistics for connections to mail servers (POP3, IMAP), fax servers (Kofax Communication Server, Biscom, RightFax), and folder import.

For each connection, you can see its configuration and historical data about message transfer:

- The columns State and Error show the general status of the connection.
- The columns Displayname, Service and Location, and User show the configuration parameters necessary for connecting to the server.

- The Processed and Messages columns show respectively the number of messages
 processed since the last restart of Kofax Import Connector and minimum number of
 pending messages waiting on the server (there can be actually more messages waiting).
- The Next Poll column shows in how many seconds will the values in the columns State, Error, and Messages update.

Licenses

This page is displayed when you click **License** on the menu. Use this page if you want to check your currently available licenses.

MC Cluster

This page is displayed when you click **MC Cluster** on the menu. It shows the status of remote Message Connectors connected via an MC cluster.

Multiple Message Connectors may be used for web-service input via network load balancing (NLB) in order to increase the message throughput. Cluster mode is only required if you want to check the status of a document that you have previously sent via web service and NLB. Different Message Connectors must be able to communicate to determine the status of a document.

- The columns State and Error show the last status of the connection to a remote Message Connector.
- The column Address shows IP address and port of the remote Message Connector.
- The column Tcp shows who initiated the connection check; "out" means local Message Connector initiated the connection; "in" means that a remote Message Connector initiated the connection check.

Test Fax

This page allows you to send a test fax message. The message is sent out and received via fax over IP included with Kofax Import Connector. From the Message Connector storage, the message is imported into Kofax Capture (if properly configured).

- 1 On the menu, click **Test Fax**.
- **2** In the Number to Dial field, type a number. For a test message this can be any number.
- 3 Click Send Fax.
- **4** Wait for Server returned ok message.
- **5** On the menu, click **Outbound** > **Processed**. After some time you will find the sent fax here. Optionally, you can click **Inbound** > **Pending** and view the message there, if the KC Plug-In service is not running. Otherwise, you will find the test fax in **Inbound** > **Processed**.

Test Email

This page allows you to send a test email message. The message is sent out and received via fax over IP included with Kofax Import Connector. From the Message Connector storage, the message is imported into Kofax Capture (if properly configured).

- 1 On the menu, click **Test Email**.
- **2** In the To field, type an email address. For a test message this can be any address.
- 3 Click Send Email.
- **4** Wait for Server returned ok message.

Find Document by ID

This page is displayed when you click **Find by ID** on the menu. Use this page to search for document with a particular ID in the storage. This function can be used during troubleshooting.

Convert Document

This page allows you to test document conversion included in Kofax Import Connector. Converting documents requires third party applications; you can use this page to verify that they are properly installed and configured. For installation, refer to Kofax Import Connector Installation Guide. For configuration, refer to the <u>Document Conversion Tab</u>.

- 1 On the menu, click **Convert Document**.
- **2** Select if you want to convert to PDF or TIFF.
- **3** Click **Browse** to select a file.
- **4** Click one of the convert buttons to display the result:
 - Click Convert (XML request/response) to display the result in XML format.
 - Click Convert (result as table) to display a table listing the size of the converted file
 in the selected formats (PDF and/or TIFF). Use as a quick test to verify conversion
 functionality.
 - Click Convert (open/download result) to display or download the converted file in PDF or TIFF format.

Note This test tool does not support compressed files (e.g. zip).

Storage

Message Connector stores all messages and files received from various sources to its internal storage before they are imported to Kofax Capture.

You can configure the storage in the <u>General Tab</u>. The <u>Status Monitor</u> page shows some maintenance information about the storage.

The storage is managed automatically. Files and messages that are correctly imported to Kofax Capture are marked for deletion and they are removed when the storage fills.

Files and messages that could not be correctly imported to Kofax Capture may fill the storage, depending on the value of the Keep Failed parameter in the <u>General Tab</u>. Refer to Kofax Import Connector Administrator's Guide, section Managing Failed Messages Manually.

The storage is divided into multiple folders:

- Click Inbound Status > Active to list active documents, i.e. documents that have been
 received by Message Connector but not yet delivered to Kofax Capture. When the archive
 to folder function is activated, documents remain in this folder until the archiving has been
 concluded.
- Click Inbound Status > Active > Failures to list documents that have been received by Message Connector but could not be delivered to Kofax Capture. Documents appear this folder only if the configuration setting Keep Failed is selected (General Tab). When the archive to folder function is activated, documents remain in this folder until the archiving has been concluded.

Note Documents remain in this folder until they are handled manually by an operator (reactivated or deleted). If not monitored, this can cause full storage and stop processing of documents.

- Click Inbound Status > Processed to list documents delivered to Kofax Capture. If Keep
 Failed is cleared, this folder also contains documents that permanently failed to import
 to Kofax Capture. Processed documents are deleted automatically from the storage when
 space for active messages is needed.
- Click Inbound Status > Processed > Failed to list documents that permanently failed to
 import to Kofax Capture. As all processed documents, they are deleted automatically from
 the storage when space for active documents is needed.
- Click Outbound Status > Active to list test fax messages and email notification messages which are queued for sending or are currently being sent (via <u>Test Fax</u>).
- Click Outbound Status > Processed to list test fax messages and email notification messages sent out by Message Connector, as well as messages that could not be sent.
- Click Outbound Status > Processed > Failed to list test fax messages and email notification messages that could not be sent.

The following commands are available for managing the documents in the storage:

- Click to display the content of the document or to save the document.
- Click to display an outgoing test fax message with a generated fax headerline.
- Click i to display additional information about a document.
- Click late to view the source of the document in XML format.
- Click to reactivate or rerun a document.
 - For inbound active documents, Message Connector attempts to import them to Kofax Capture.
 - For inbound processed documents, Message Connector attempts to import them to Kofax Capture. If used on documents that have already been successfully imported to Kofax Capture, a copy of the document will be imported to Kofax Capture.

- For outgoing test fax messages, Message Connector attempts to send the fax again.
- Click X to delete a document from the storage.

Technical Assistance for Your Kofax Product

Support for your Kofax product is provided by your primary application support provider, which is specified as part of the maintenance agreement associated with your purchase. Please contact your Kofax application support provider for technical assistance.

For more information about your product, visit the Kofax Support pages at http://www.kofax.com for:

- Product information and release news
- Access to the Kofax Knowledgebase
- Access to the online Case Management System (for eligible customers)
- Downloadable product documentation

Before contacting your Kofax application support provider, please gather the following information where applicable:

- Product name, version, and serial number
- Log files
- Product license
- Exact error message(s)
- Reproduction scenario

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