

Kofax Mobile Capture

Getting Started Guide

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Preface

This guide includes the information you need to get up to speed with your Kofax Mobile Capture application.

Documentation for this product is available [online](#).

Training

Kofax offers both classroom and computer-based training that will help you make the most of your Kofax Capture solution. Visit the Kofax Web site at www.kofax.com for complete details about the available training options and schedules.

Getting help for Kofax products

Kofax regularly updates the Kofax Support site with the latest information about Kofax products.

To access some resources, you must have a valid Support Agreement with an authorized Kofax Reseller/ Partner or with Kofax directly.

Use the tools that Kofax provides for researching and identifying issues. For example, use the Kofax Support site to search for answers about messages, keywords, and product issues. To access the Kofax Support page, go to www.kofax.com/support.

The Kofax Support page provides:

- Product information and release news
Click a product family, select a product, and select a version number.
- Downloadable product documentation
Click a product family, select a product, and click **Documentation**.
- Access to product knowledge bases
Click **Knowledge Base**.
- Access to the Kofax Customer Portal (for eligible customers)
Click **Account Management** and log in.

To optimize your use of the portal, go to the Kofax Customer Portal login page and click the link to open the *Guide to the Kofax Support Portal*. This guide describes how to access the support site, what to do before contacting the support team, how to open a new case or view an open case, and what information to collect before opening a case.

- Access to support tools
Click **Tools** and select the tool to use.

- Information about the support commitment for Kofax products
Click **Support Details** and select **Kofax Support Commitment**.

Use these tools to find answers to questions that you have, to learn about new functionality, and to research possible solutions to current issues.

Overview

Kofax Mobile Capture is an application that runs on your mobile device (smartphone or tablet) with a link to your main office document capture workflow system. All data is encrypted and transferred using an industry standard secure communications protocol.

Note Low Memory Warning: Kofax Mobile Capture uses its allocated internal storage in-device memory for all data. When you launch Kofax Mobile Capture, try to take a picture, or add an image from the gallery, the application checks available memory. If memory is low, you are prompted to clear space.

General workflow

1. Launch the application and go through the "walk-through screens" and "Get Started."

Note The walk-through screens will only appear on first launch after installing the application.

2. Connect to the appropriate server to retrieve the document types.
3. Select a document.
4. Add images to the document by either capturing the images or selecting them from the gallery.
5. Delete, Rotate or Crop images, if required.
6. Add or Edit the field details for the document.
7. Submit the document.

Login

You have the following options for logging in:

- Kofax Server.
- Custom Server.

Kofax Server

When you select Kofax Server, you are connected to a publicly available demo server that provides sample document types. When you select these document types, images are processed with the image processing parameters set on the server. When you submit, you will receive an email of the processed documents.

Custom Server

When Kofax Server is turned off, you can log in to a custom server. Specify the information required by the server, which can include the following:

- Host name
- Server type
- User name
- Password

The application receives document types specified on the server. When you select these document types, images are processed with the image processing parameters set on the server. When you submit, the documents are received by the configured server.

Menu

The following items are in the menu:

Capture Document

Displays document types retrieved from the server. Tap on any document type to create a new document.

Pending Documents

Lists documents that have not yet been submitted.

Favorite Documents

Displays documents that you have marked as favorites. This feature is off by default. Enable it from the Settings menu.

Assist Kofax

Enables you to submit images of bills, passports, checks and IDs to a Kofax demo server. These images may be used by Kofax to make improvements to the product. See [Assist Kofax](#).

Gift Card

Obtains the balance of selected gift cards. This option is only available when connected to the Kofax Server. See [Gift card](#).

Help & About

Provides help and other information about the application.

Settings

Provides the following options for configuring the application.

- **Server:** Information about the server to which the application is connected. These values are non-editable.
- **Favorite Documents:** Set to On to enable this feature. You can add documents to Favorite Documents on the menu by tapping the star next to the document name.
- **Manual Capture Timer:** Displays a Capture button after a set period of time so that documents can be captured manually. By default, the timer is set to 15 seconds.

Note Even after the Capture button appears, you can still capture documents automatically.

- **Review Original Image:** Turn On or Off to specify whether or not the original image is displayed for review.
- **Review Processed Image:** Turn On or Off to specify whether or not the image is displayed for review after processing.
- **Show Gallery:** Turn On or Off to use or turn off gallery mode.

- Show Batch Mode: Turn On or Off to use or turn off batch mode.

Log Out

Logs you out of the application.

Creating a new document

Once the application is logged into a Kofax Front Office Server or TotalAgility server, a list of available document types are downloaded from the server. The list of document type names are displayed on the Home screen. You can choose any document type to start a new document.

After selecting a document type, the application launches the Capture screen and downloads document type details in the background, which contain image processing strings and field information for that document type. After the images are captured, the application creates a `Document` with its field information and serializes it on disk.

Adding images to a document

After selecting a new document, you can add images in the following two ways:

- Camera
- Gallery

Camera

When capturing images using the camera, the application uses the SDK capture experience to detect and automatically capture an image.

Images can be captured in the following two modes:

- **Batch Mode Off:** This is the default mode of capture, wherein a single image is captured at a time and the corresponding preview is available. Images can be retaken or edited (rotated or cropped) in this mode. Once you tap Use, image processing starts and you are presented with a thumbnail of the processed image.
- **Batch Mode On:** This mode of capture enables you to continuously capture images. This mode does not enable you to view the captured images, instead the image processing happens in the background and you are presented with the thumbnails when you tap Done.

Note By default, images are auto captured using the SDK capture experience. However, you can manually capture by tapping on the Capture button, which appears once the Manual Capture time is reached. The time allowed for Manual Capture can be adjusted using the Settings option.

Gallery

You can select images from the gallery. A maximum of 10 images can be selected at a time.

Document properties and modification

Before submitting the document to the server, you can edit the following document properties.

Change Order of Images

The order of the images can be changed by a long press on any image thumbnail and dragging it to the desired position. Once all the reordering is done, and you close the view, the final reordering is updated in the database.

View Document Information

The creation date, time, and first field details of the document can be viewed from the pending document list.

Delete a Document

Documents can be deleted from the Pending Documents list.

Image Processing

Images added to a document type gets processed depending on the processing parameters that were downloaded for the document. A progress loader is shown over the image currently being processed. If processing fails, then the image is indicated by a red mark.

If you do not want an image to have processing performed, configure the Scan Settings on the Kofax Front Office Server or TotalAgility server with the following settings:

- Scan Color Mode: As Scanned
- Scan DPI: As Scanned
- Auto Deskew: Unchecked
- Auto Crop: Unchecked
- Blank Page Removal: Unchecked
- Auto Rotation: Unchecked
- Advanced Image Processing Settings: Empty

Change Document Type

Change the document type by tapping **Change Type** in the thumbnail screen. After selecting this option, you are presented with a list of available document types with the current highlighted document. Selecting a different document from the list changes the type, which has the following implications:

- The application downloads the new document type, if necessary.
- The application tries to map data from the old to the new fields where the names match. Old fields that cannot be mapped are discarded.
- The original images are reprocessed with the processing settings of the new document type.

View Edit Field Information

If the document has fields, you can edit the document's field information before submitting.

Working with images

You can perform the following operations in the application.

Process

An option in the preview screen enables you to explicitly process a "Process Failed" image. Tap the thumbnail of a "Process Failed" image to open it and then use the Process option to process it again.

Edit

Tap **Edit** in the original image preview screen to crop or rotate the image.

Note These options are not available when an image is added from the gallery, or when you tap on a thumbnail image in the preview screen.

View Image Size and Geo-Tagging Location

The image size and geo-tagging location, as well as other information about the image, can be seen by tapping on the information button in the preview screen.

Delete Image

A delete option is provided on the preview screen.

Submitting documents

You can submit the documents to the server to which it is configured. In order for submission to start, the field information should be entered correctly and all the images should be processed. No unprocessed or process failed images can be sent to the server.

Once the document is submitted to the server, it is deleted from the device. If the submit fails due to a network problem or server issue, the application will preserve the document object by serializing it on disk and it will be available in the pending documents list, thereby ensuring the document is not lost and can be submitted again.

Document submission continues even if the application goes in the background or there is an event such as an incoming phone call. If the submission cannot continue in the background for any reason, it should resume smoothly when the application comes to the foreground.

You can cancel the document submission to the server by tapping Cancel.

Anonymous login

If you log on anonymously, the default profile documents are displayed. No username or password is required for this feature. Anonymous login enables you to fetch global shortcuts, and it is available only for a custom server.

Note Devices with Android 6.0 or later that were registered with previous versions of Kofax Mobile Capture need to be re-registered after upgrading to Kofax Mobile Capture 3.3.0.

If you want to use the anonymous login feature for devices configured in TotalAgility, do the following on the Kofax TotalAgility server:

1. In TotalAgility Designer, select **System Settings > Devices > Settings**.
2. Clear **Require Authentication for Device Registration**.

Note Selecting this option means that credentials are required, making it impossible to log in anonymously.

To use anonymous login for devices configured in Kofax Front Office Server, do the following:

1. Log on to the Kofax Front Office Server Administration Console.
2. Select Settings.
3. Clear **Require Authentication for Device Registration**.

Offline mode

This feature enable you to work with the application when it is not connected to a network. Note the following points:

- In order to use the application in offline mode, you must have already logged in to online mode at least once with the correct combination of Username, Host Name and Server Type.
- The password is not considered when in offline mode.
- You cannot submit documents to the server in offline mode.
- A visual indicator shows you are working offline.
- Only the last logged-in user can log on to the offline mode.
- In offline mode, you can add images to a document, delete images from a document, perform manual crop and rotate, and perform processing if the document properties have been downloaded at least once in online mode.
- Pending items which were created while in online mode will be visible when you are in offline mode.
- Gift Cards are not supported in offline mode.
- If the network becomes available while you are in offline mode, the application will ask if you would like to switch to online mode or not. If you select online mode, the application will return to the Login screen so you can log in. If you continue in offline mode, and later want to enter online mode, then you have to explicitly log out then log in.
- Changing the document type is not supported.
- Log Out is disabled in offline mode.

Assist Kofax

This feature enables you to submit images to a Kofax demo server. These images may be used by Kofax to make improvements to the product. The demo server only supports bills, passports, checks, and IDs.

Note Check the EULA for the terms of use for this feature.

The following is an overview of using the Assist Kofax feature:

1. Select Assist Kofax and choose the appropriate kind of document from the list.
2. Add images by using either the camera or gallery. The images will not be processed.
3. The document is submitted to the Kofax Demo server.

Configure capture workflow

This feature allows the administrator of Kofax TotalAgility (from version 7.3.1) or Kofax Front Office Server (from version 4.1.1) to configure the application capture workflow. Through server-side settings, the administrator can configure whether the Kofax Mobile Capture app user can do the following:

- Override server-side settings.
- Review captured images.
- Review processed images.
- Show or hide the gallery.
- Show or hide batch mode.

To use this feature, the following key-value pairs need to be configured on the server under the Advanced tab in the Settings section. Create or use the existing namespace `app.custom.kmc.settings`. For this namespace, the following options can be configured:

- `ReviewOriginalImage`
- `ReviewOriginalImageUserControl`
- `ReviewProcessedImage`
- `ReviewProcessedImageUserControl`
- `ShowGallery`
- `ShowGalleryUserControl`
- `ShowBatchModeOnOff`
- `ShowBatchModeOnOffUserControl`

By default, all the above options are configured in the Kofax server and are set to the enabled state.

If `ReviewOriginalImageUserControl`, `ReviewProcessedImageUserControl`, `ShowGalleryUserControl`, and `ShowBatchModeOnOffUserControl` are enabled at the server side, the Kofax Mobile Capture application user has authority to change the default settings of these options.

The default options are retrieved from the server when you log in to the application. The changes made to these settings at the application side will not be reflected at the server side.

If the server administrator does not configure any of these settings at the server side, the application will behave like Kofax Mobile Capture 3.0.1 and four new settings appear as disabled on the Setting screen:

- Review Original Image
- Review Processed Image
- Show Gallery
- Show Batch Mode

If some of these are set, the remainder will be considered as false.

Gift card

When you are connected to the Kofax Server, the application gives an option on the home screen to check gift card balances for selected gift card types.

Supported gift cards include:

- Target
- Starbucks

Note Gift Card is available only in the USA.

Retrieve card balance

You can select one of the supported gift cards from the gift card selection screen. Then you can capture an image of the back of the gift card to extract the card and pin numbers to get the gift card balance.

When available, the following information is retrieved:

- Brand
- Card Number
- Pin Number
- Balance

When information cannot be read from the card, you have the option of entering the card number and pin manually before requesting the balance.

Localization and internalization

The Kofax Mobile Capture App is localized for the following languages. All date and time formats in the app will be internationalized.

- French
- German
- Portuguese (Brazilian)
- Spanish (Neutral)
- Italian

Auto configuration

Auto launch with custom URL

The Auto Launch feature allows the system administrator to facilitate the process of opening the Kofax Mobile Capture application while at the same time automatically sending information (the document type name and its field contents) to the application so that you do not have to provide these details.

For example, suppose that a user has already submitted a document, but some time later an additional document is required (a trailing document). The head office can create a custom URL as a link in an email to the user, then Kofax Mobile Capture will automatically launch with the specified data and settings when the user taps the link.

If desired, the custom URL may also contain the Kofax Front Office Server or TotalAgility server, its URL, and the user's login credentials (user name and password). If the values stored in the application do not match those extracted from the custom URL, a warning message will inform the user of the discrepancy and ask permission to continue. If permission is granted, the application will (if logged in) silently log out of Kofax Front Office Server or TotalAgility, and the new credentials will be saved and used to log in again. If permission is denied, no further action takes place.

If the custom URL includes a document type, the application will then automatically create a new document using that type. Otherwise, the application will open at the Home screen. If there are user credentials and/or Server URL included in the custom URL, those will be set first, then the Home Screen will be displayed. If the user is not already logged in, going to the Home screen will perform an automatic login using the currently set credentials and the Kofax Front Office Server or TotalAgility server URL.

Note If Kofax Mobile Capture is the only application on the device that has registered itself with the OS for this URL scheme, then the application will automatically be launched. However, if other installed applications make use of this URL scheme, the operating system will ask the user to select the appropriate application.

The custom URL always begins with **kmc://** (there is no domain, port, or path) and can contain the following elements. If an element is omitted, default values are used. In addition, the custom URL string must use URL encoding (no spaces, etc.).

Name	Value
document_name	This is the shortcut name of the document to auto-launch.
document_field	A two-part parameter for document field data. There can be multiple <code>document_field</code> parameters within the URL. Each parameter should be in the form of: <code>document_field=<FIELD_NAME> <FIELD_VALUE></code>
do_field_update_first	This is a parameter that affects the behavior of the application. If set to "false", the application will open to the Camera screen, if "true", it will open to the enter Information screen.

Name	Value
kfs_url	Fully specify the Kofax Front Office Server or TotalAgility server name, port, and any file path extension. If the server uses https, it is necessary to include the server name. If the server uses http then the user can provide the server IP, or the server name.
user_name	Kofax Front Office Server or TotalAgility user name credential.
password	Kofax Front Office Server or TotalAgility user password credential.
email_address	Optional Kofax Front Office Server or TotalAgility server email notification address.
isAnonymous	A custom URL for anonymous login can be identified by using the "isAnonymous" string in the URL. Then it directly calls the <code>getDocumentTypes</code> method in the <code>Document Manager</code> class. If set to "false", anonymous is ignored.

Below are some sample custom URLs for Kofax Front Office Server:

- kmc:///do_field_update_first=true&document_name=TriSpec%20Order%20Forms&document_field=claimid|125**
 The document type "TriSpec Order Forms" with the document field "claimid" must preexist. In this example, the "claimid" will be assigned a value of 125. The behavior specified by `do_field_update_first` in this URL will first take the user to the screen where the fields are to be filled in, instead of the camera screen.
- kmc:///document_name=TriSpec%20Order%20Forms&document_field=claimid|125**
 Similar to the previous example, but behavior of the action is not defined, so it uses the default behavior defined by the application.
- kmc:///document_name=TriSpec%20Order%20Forms**
 Since the `document_field` is not specified in this example, the application will open a new document with the document type "TriSpec Order Forms."
- kmc:///document_name=TriSpec%20Order%20Forms&document_field=claimid|125&kfs_url=http://173.32.16.101:80/ABC/polar2/services/&user_name=User01&password=mypassword&email_address=something@gmail.com**
 Similar to the previous example, but includes URL, credentials, and email.
- kmc:///kfs_url=http://172.26.35.190:80/KFS/axis2/services/&isAnonymous=true**
 Upon clicking the link, the user will be directly logged into the application anonymously.

Below are some sample custom URLs for Kofax TotalAgility:

- kmc:///kfs_url=http://172.26.39.105:80/TotalAgility/kofax/kfs/legacy/ws/&user_name=KMDUser&password=DemoPassword**
 Upon clicking the link, the user will be logged into a particular Kofax TotalAgility server with user KMDUser.
- kmc:///document_name=MFPTest_DeviceScan&document_field=ControlVariable:FIELD1|3/31/2014**

The document type MFPTTest_DeviceScan with the document field FIELD1 must preexist. In this example, FIELD1 will be assigned a value of 3/31/2014.

- `kmc:///?kfs_url=http://172.26.39.105:80/TotalAgility/kofax/kfs/legacy/ws/&isAnonymous=true`

Upon clicking the link, the user will be directly logged into the application anonymously.

Note Starting from KFS 4.1, the index field names have a "Document:" prefix and the batch field names have a "Batch:" prefix.

Example 1: `kmc:///?document_name=TestClass&document_field=Document:testvalue|Test123`

Example 2: `kmc:///?document_name=TestClass&document_field=Batch:textfield|1234`

Using Kofax Mobile Capture with Kofax Front Office Server

Kofax Front Office Server exchanges information with a mobile device. That information is then passed on to Kofax Capture or Kofax Transformation for final processing before being exported to the data repository.

Each document type on the mobile device is associated with a corresponding shortcut on Kofax Front Office Server, which in turn is linked to a form type in Kofax Capture. The fields for the document type are sent to the mobile device each time the device logs on. Image processing settings, such as those for deskew, color, grayscale, and bitonal, are also sent to the mobile device.

Completed information (data associated with the fields and images of documents) is sent back to Kofax Front Office Server when the document is submitted from the mobile device.

The following Kofax Front Office Server settings are ignored by Kofax Mobile Capture:

- Device Profiles:
 - Log on
 - Send to Me
 - Send to Inbox
 - Coversheets
- Shortcuts:
 - Blank Page Removal

The Kofax Front Office Server administrator needs to set up the appropriate shortcuts which appear as document types on the mobile device. Refer to the Kofax Front Office Server documentation for more information on creating shortcuts.

Note that mobile devices are licensed separately from MFP devices. Each mobile device consumes a station license that will appear as a "Kofax Front Office Server Mobile Device" license in the license utility.

Image processing

Image processing is performed on the mobile device. Image processing options are set in the Kofax Front Office Server Administration Console. These settings are passed to Kofax Mobile Capture with the document (shortcut) data.

Using Kofax Mobile Capture with Kofax TotalAgility server

Each document type displayed on your mobile device is associated with a corresponding Device form on Kofax TotalAgility, which in turn is linked to a form type in Kofax TotalAgility data. The fields for the document type are sent to the mobile device each time the device logs on. Image processing settings, such as those for deskew, color, grayscale, and bitonal, are also sent to the mobile device.

Completed information (data associated with the fields and images of documents) is sent back to Kofax TotalAgility when the document is submitted from the mobile device.

You can maintain Kofax TotalAgility device application settings for multi-function peripherals (MFPs) and mobile devices. Settings include device registration, application download and deployment, device profiles, and other advanced settings.

When an MFP connects to Kofax TotalAgility, Kofax TotalAgility automatically adds the MFP to the available devices list in Devices. For mobile devices, the actions are similar: when the device connects to Kofax TotalAgility, Kofax TotalAgility adds it to the available devices list.

Scan/VRS profiles

Kofax TotalAgility uses Scan/VRS profiles to store common scanner, normalization, binarization, conversion and image perfection settings for reuse. You can also configure advanced settings to further enhance the image quality, which includes cropping, de-skewing, de-speckling, advanced binarization, and more.

Kofax TotalAgility provides a default Scan/VRS profile. You can edit the default profile or create additional profiles. You can associate a Scan/VRS profile with a capture-enabled process or use it in scan interfaces, on mobile devices, in upload scenarios, and more.

Image processing activity

Use the automatic Image Processing activity to process images that have been imported and images that have been scanned from an MFP. If a process has an Image Processing activity, it is applied to all documents that the job gets created for, regardless of the method used for creating the job (MFP, Web Scan, Scan Create New Job, Upload, Import, Mobile, and the rest).

For example, if you scan 10 documents or upload them or import them upon job creation, all of them are processed by an Image Processing activity if there is one in the job's process.

The Image Processing activity uses Transformation Server to convert documents and images into TIFF images and apply image enhancement filters. Only JPG formats can be converted.