Kofax Mobile Capture

Getting Started Guide

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KOFAX

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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 the user launches Kofax Mobile Capture, tries to take a picture, or adds an image from the gallery, the application checks available memory. If memory is low, the user will be promoted 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

- Use Kofax Sever.
- Use Custom Server.

Menu

The following items are in the menu:

Scan Document

The user can tap any one document type to create a new document.

Pending Documents

The user can view documents which have not been submitted.

Favorite Documents

The user can tag preferred documents in the document list.

Assist Kofax

This feature allows the users 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

When the user is connected to the Kofax Server, the application gives an option on the home screen to check gift card balances for selected gift card types. See Gift card.

Help & About

Provides help and other information about the application.

Settings

Opens the settings screen. On the settings screen the user can configure a timer in the Manual Capture mode. The default value is 10 seconds. Once the specified time has elapsed, the Auto Capture Mode is disabled, and the Manual capture button is visible so the user can capture manually. The user can also view details about the server to which the application is connected.

Logout

Logs the user out of the application.

Creating a new document

Once the application is logged into a KFS or KTA server, a list of available document types are downloaded from the server. The list of document type names are displayed on the Home screen. The user 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 necessary images are captured, the application creates a `Document` with its field information and serializes it on disk.

If the mobile application is configured to use the Kofax server, then the user can scan documents in black & white or color.

Adding images to a document

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

- Capture via camera
- Using the gallery

Capture via Camera

When capturing images using the camera, the application leverages the SDK APIs to detect and auto 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 edited (rotated/ cropped) in this mode. Once the user taps on Use, image processing starts and the user will be presented with a thumbnail of the processed image. The user can discard an image and start over using the Retake button.
- **Batch Mode On**: This mode of capture allows a user to continuously capture images by changing device angles/parameters. This mode doesn't allow the user to view the captured images, instead the image processing happens in the background and the user is presented with the thumbnails once the user taps the Done button.

Note By default, images are auto captured using the SDK capture experience. However a user can manually capture by tapping on the Capture button, which appears after the manual capture time expires. The time allowed for Manual Capture can be adjusted using the settings option.

Using the Gallery

The user 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, the user 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 the user closes 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

One or more documents can be deleted by selecting the document from the list of pending documents and selecting Delete.

Image Processing

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

Change Document Type

The user can modify the document type of a pending document. To use this option, the user needs to open the required document from the list of all pending documents. After selecting this option, the user is presented with a list of available document types with the current document that is highlighted. Selecting a different document from the list will change the type. Changing the document type 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.
- All the processed images associated with the old document type are deleted. Unprocessed images are retained.
- The image processing settings associated with the new document type are applied to the raw images. For devices with sufficient resources, the application queues the document for background image processing. For resource-constrained devices, the image processing happens in the foreground and the user is forced to wait for the image processing to complete.

View Edit Field Information

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

Working with images

Users can perform the following imaging operations from within the application.

Process

An option in the preview screen allows the user 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.

Crop and Rotate

Both of these options are available only on the preview screen after capturing an image using the camera .

Note These options are not available when an image is added from the gallery, or when the user taps 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

The user can submit the document created to the configured server. There application performs several checks before the submit is started. If there are required fields in the document type that have not been completed, or there are invalid fields, the user is presented with a message to input fields and a data entry screen is displayed for those fields.

If any of the images associated with the document are still being processed, or are in the queue to be processed, the user is instructed to wait for the image processing to complete. 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 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.

The user can opt to cancel the document submission to the server by tapping on the Cancel button.

Anonymous login

If the user logs in anonymously, the default profile documents are displayed. No user-name or password is required for this anonymous login feature. Anonymous login allows the user to fetch the Global Shortcuts. Anonymous login is available only for a custom server.

If you want to use the Anonymous Login feature, do not set the "Require Authentication Challenge" on the Kofax TotalAgility server to ON. Instead, ensure it is set to OFF. Setting this check to ON means that credentials are required, making it impossible to log in anonymously.

Note If a user is logged in anonymously when upgrading from KMC 2.6 to 3.0, they will not be logged in when 3.0 is installed. Anonymous login is not available for the demo server.

Offline mode

This feature allows the user 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, a user 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.
- The user cannot submit documents to the server in offline mode.
- There is a visual indicator that shows the user is working offline.
- Only the last logged-in user can login to the offline mode.
- In offline mode, the user 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 the user in offline mode. Once the network is available and the user successfully logs in, then all that user's pending items will be visible (both offline and online). However, if the user is inside the application and it goes offline, then the user will be able to see pending items created in both offline and online modes, since the user has already been authenticated.
- Gift Cards are not supported in offline mode.
- If the network becomes available while the user is in offline mode, the application will ask if the user would like to switch to online mode or not. If the user selects online mode, the application will return to the Login screen so the user can log in. If the user continues in offline mode, and later wants to enter online mode, then the user will have to explicitly log out then log in.
- The Change document type is not supported.
- The Logout button will be disabled in offline mode.
- Anonymous login is possible in offline mode.

Assist Kofax

This feature allows users 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. The user can capture images of these kinds of documents and submit them to the demo server as an Assist Kofax document type.

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

Following is an overview of using the Assist Kofax feature:

1. Select Assist Kofax and choose the appropriate kind of document from the list. After the selection has been made, the camera viewfinder will appear.

2. Use the camera viewfinder to capture the document. The captured document is not processed, cropped, or rotated.

3. The captured document will be submitted to the Kofax demo server.

This feature doesn't support the following:

- Custom URLs: the application will display an appropriate error message if the user attempts to create an Assist Kofax document using a custom URL.
- Display of fields and values present in the document. The Assist Kofax document type should be configured with no fields on the server side.

Gift card

When the user is 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
- Nordstrom
- Starbucks
- Costco
- Walgreens

Note Gift Card is available only in the USA.

Retrieve card balance

The user can select one of the supported gift cards from the gift card selection screen. Then the user 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
- Expiration Date
- Balance

When information cannot be read from the card, the user has 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 the end user does not have to provide these details.

> **Note** If you install the iOS version of this application from a source other than the App Store, upon first launch you will see an alert informing you that the application comes from an "Untrusted App Developer". However, if a custom URL is used during the first launch, that alert will not appear, and therefore, without explicit user confirmation, the application cannot open.
>
> However, launches with a custom URL should proceed without incident, provided the application is launched normally (without using a custom URL) at least once before any custom URL is used.
>
> This behavior is not seen if the application is download and installed from the App Store.

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, 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 and the new credentials will be saved and then 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 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.

Name	Value
`document_field`	A two-part parameter for document field data. There can be multiple `document_field` parameters within the URL. Each parameter should be in the form of: `document_field=<FIELD_NAME>|<FIELD_VALUE>`
`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.
`kfs_url`	Fully specify the KFS 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`	KFS User name credential.
`password`	KFS User's password credential.
`email_address`	Optional KFS 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 `getDocumentTypes` method in the `Document Manager` class. If set to "false", anonymous is ignored.

Below are some sample custom URLs:

- `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 just 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_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 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 MFPTest_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 has a "Document:" prefix and the batch field names has a "Batch:" prefex.

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, images of documents, and other related photographs) is sent back to Kofax Front Office Server when the document is submitted from the mobile device.

"Enable MFP self registration" in the Kofax Front Office Server "Administration Console - Settings" tab must be selected so that supported mobile devices will automatically register upon connection. No additional configuration is required to establish a connection between the mobile device and Kofax Front Office Server.

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

- Device Profiles:
  - Log on
  - Send to Me
  - Send to Inbox
  - Coversheets
  - DPI settings
- 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 performed by EVRS occurs 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. Such image processing is not performed by Kofax Front Office Server.

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, images of documents, and other related photographs) is sent back to Kofax TotalAgility when the document is submitted from the mobile device.

The user 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.

After an MFP is on the available devices list, the following occurs, depending on the Devices settings:

If self-registration is enabled, Kofax TotalAgility adds the device.

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 eVRS 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.

To process images that are scanned from an MFP, you must add the Image Processing activity to the map.

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.

Glossary