

Kofax TotalAgility

Installation Guide

Version: 7.7.0

Date: 2019-09-19

The KOFAX logo is displayed in a bold, blue, sans-serif font. The letters are thick and closely spaced, with a clean, modern appearance.

© 2019 Kofax. All rights reserved.

Kofax is a trademark of Kofax, Inc., registered in the U.S. and/or other countries. All other trademarks are the property of their respective owners. No part of this publication may be reproduced, stored, or transmitted in any form without the prior written permission of Kofax.

Table of Contents

| | |
|--|-----------|
| Preface..... | 8 |
| Related documentation..... | 8 |
| Offline documentation..... | 9 |
| Training..... | 9 |
| Getting help with Kofax products..... | 9 |
| Chapter 1: Installation planning..... | 11 |
| Utilities..... | 11 |
| License Proxy..... | 11 |
| Licensing information..... | 12 |
| Concurrent user licensing..... | 12 |
| Activate a license in TotalAgility..... | 12 |
| Automatic recovery..... | 13 |
| Kofax Message Connector..... | 13 |
| System limits..... | 13 |
| Reporting Server..... | 14 |
| Kofax VRS Elite..... | 14 |
| Web Capture Service..... | 14 |
| Scan Agent Service..... | 15 |
| Chapter 2: TotalAgility installation..... | 16 |
| Perform a silent installation..... | 16 |
| Silent installation for Database Only..... | 17 |
| Silent installation of Web and Application on the same server..... | 22 |
| Silent installation on a separate Web and Application server..... | 30 |
| Silent installation for Real Time Transformation Server..... | 33 |
| Upgrade TotalAgility in silent mode..... | 41 |
| Perform a standard installation..... | 42 |
| Install Database Only..... | 43 |
| Install Web Server..... | 44 |
| Install Application Server..... | 46 |
| Install Web and Application Server..... | 50 |
| Install Real Time Transformation Server..... | 56 |
| Upgrade Transformation Designer Help..... | 58 |
| Perform TotalAgility installation in a Docker container..... | 58 |
| Install Docker on Windows server..... | 59 |

| | |
|--|-----------|
| Create a TotalAgility Docker container image..... | 60 |
| Run a Docker container..... | 66 |
| Import SSL certificate on the container..... | 70 |
| Use Windows authentication with IIS and SQL server..... | 71 |
| Install TotalAgility on a non-standard port..... | 71 |
| Edit bindings..... | 71 |
| Update the base address..... | 71 |
| Restart the Streaming Service..... | 72 |
| Install databases manually..... | 72 |
| Import Artifacts..... | 78 |
| Configure TotalAgility for high availability..... | 78 |
| Access TotalAgility through iPad or iPhone..... | 78 |
| Federated Security-Generate a common machine key..... | 79 |
| Encrypt and decrypt the configuration files..... | 79 |
| Encrypt and decrypt Web.config..... | 79 |
| Encrypt and decrypt the configuration files of executables..... | 80 |
| Encrypt the configuration files in a docker container..... | 83 |
| Edit the TotalAgility configuration settings..... | 83 |
| Update the parameter values..... | 84 |
| Support export vertical scaling..... | 84 |
| Configure the wait time for export activities..... | 85 |
| Update settings for manual authentication..... | 85 |
| Update settings for the TotalAgility linked servers..... | 87 |
| Alter the virtual root for the Kofax TotalAgility website..... | 87 |
| Add custom job thread pools..... | 87 |
| Add a thread pool monitoring interval..... | 88 |
| Add performance monitoring counters..... | 89 |
| Anti-Cross Site Request Forgery (CSRF) tokens..... | 90 |
| Install the language pack..... | 91 |
| Install the .NET Framework language packs..... | 91 |
| Access TotalAgility documentation..... | 91 |
| Online documentation..... | 91 |
| Offline documentation..... | 92 |
| Run EVRSCheck utility..... | 94 |
| Chapter 3: Transformation Server Bundle installation..... | 96 |
| Perform a silent installation..... | 96 |
| Perform a standard installation..... | 97 |
| Encrypt and decrypt the configuration file..... | 100 |

| | |
|---|------------|
| Use Kofax.CEBPM.EncryptConfig.exe..... | 100 |
| Decrypt the configuration file..... | 102 |
| Edit the configuration file..... | 102 |
| Install the NLP language packs manually..... | 103 |
| Upgrade Transformation Server using silent install..... | 104 |
| Uninstall the Transformation Server..... | 104 |
| Chapter 4: Reporting Server installation..... | 105 |
| Perform a silent installation..... | 105 |
| Perform a standard installation..... | 106 |
| Uninstall the Reporting Server..... | 107 |
| Chapter 5: Integrate Microsoft SharePoint with TotalAgility..... | 108 |
| Configure the Application Pool for the SharePoint communicator site..... | 109 |
| Update the Web configuration file..... | 109 |
| To get custom pages..... | 109 |
| To support event handlers..... | 110 |
| For a SharePoint Site..... | 112 |
| Configure the TotalAgility Integration with SharePoint using SSL..... | 113 |
| Network authentication for SharePoint and TotalAgility..... | 113 |
| TotalAgility and SharePoint are on the same domain..... | 113 |
| TotalAgility and SharePoint are on different domains..... | 114 |
| Configure the TotalAgility custom Web pages in SharePoint..... | 114 |
| Enable Single Sign-On..... | 114 |
| Add the TotalAgility custom web pages to the SharePoint quick launch menu..... | 115 |
| Add the create TotalAgility workflow context menu item to a document library..... | 116 |
| Configure the custom web pages..... | 117 |
| Configure TotalAgility Web Parts in SharePoint Server..... | 118 |
| Use the Web Services..... | 118 |
| Enable session..... | 118 |
| Set Up the Microsoft SharePoint Server and Kofax TotalAgility to provide fault tolerance..... | 119 |
| Set up the TotalAgility server..... | 119 |
| Set up the Microsoft SharePoint server..... | 120 |
| Chapter 6: Integrate Microsoft Dynamics CRM with TotalAgility..... | 121 |
| Dynamics CRM installation..... | 121 |
| Update the Web configuration file for Dynamics CRM..... | 121 |
| Update Web.config for the CRM Virtual Directory..... | 123 |
| Chapter 7: Integrate Microsoft Dynamics AX with TotalAgility..... | 125 |
| Create Dynamics AX service reference to the TotalAgility web service..... | 126 |
| Create Dynamics AX 09 service reference to the TotalAgility web service..... | 126 |

| | |
|---|------------|
| Create Dynamics AX 12 service reference to the TotalAgility web service..... | 126 |
| Add a reference..... | 127 |
| In Dynamics AX 09..... | 127 |
| In Dynamics AX 12..... | 127 |
| Copy files manually..... | 127 |
| Import the TotalAgility connector class into Dynamics AX..... | 128 |
| Edit database X++ event methods..... | 128 |
| Register the database log events..... | 129 |
| Verify the Application Pool account..... | 129 |
| Chapter 8: Integrate Microsoft Outlook with TotalAgility..... | 130 |
| Chapter 9: Integrate Micro Focus Content Manager with TotalAgility..... | 131 |
| Identify the Content Manager SDK Version..... | 131 |
| Set up the Micro Focus Content Manager server..... | 131 |
| Install and configure TotalAgilityTrimCommunicatorService..... | 131 |
| Configure the event handler in Content Manager..... | 133 |
| Chapter 10: Integrate Kofax SignDoc with TotalAgility..... | 135 |
| Set up the Kofax SignDoc server..... | 135 |
| Chapter 11: KCM proxy installation on the Web server..... | 136 |
| Silent installation..... | 136 |
| Standard installation..... | 136 |
| Docker installation..... | 136 |
| Update the KCM Server URL in TotalAgility Web.config..... | 137 |
| Manually update the KCM Server URL in TotalAgility Web.config..... | 137 |
| Using the Configuration Utility..... | 138 |
| Install KCM Proxy manually..... | 138 |
| Chapter 12: Configure HTTPS communication..... | 139 |
| Configure TotalAgility for HTTPS communication..... | 139 |
| Enable SSL for the TotalAgility application in IIS..... | 139 |
| Update the TotalAgility configuration files..... | 139 |
| Configure the Transformation Designer for HTTPS communication..... | 143 |
| Chapter 13: TotalAgility License Proxy installation..... | 144 |
| Modify the TotalAgility license proxy information..... | 145 |
| Chapter 14: Configure VRS Elite for TotalAgility..... | 146 |
| Kofax VRS Basic or Professional OEM installations..... | 146 |
| Standalone installations..... | 146 |
| Kofax VRS Elite licensing managed by the Kofax TotalAgility License Server..... | 146 |
| Install VRS Server..... | 146 |
| Use Kofax VRS Elite with the TotalAgility Scan Client..... | 147 |

| | |
|--|------------|
| Chapter 15: Kofax Web Capture Service installation..... | 148 |
| Install at the default location..... | 148 |
| Install at custom location..... | 148 |
| Use the Web Capture Service on multiuser environment..... | 148 |
| Use the Web Capture Service on MS Terminal Server..... | 148 |
| Use the Web Capture Service on Citrix..... | 149 |
| Install the Web Capture Service as Windows Service..... | 149 |
| Upgrade the Web Capture Service..... | 149 |
| Chapter 16: Scan Agent Service installation..... | 150 |
| Standard installation..... | 150 |
| Scanning with Scan Agent Service..... | 151 |
| Chapter 17: Launch TotalAgility..... | 152 |
| Launch TotalAgility Workspace..... | 152 |
| Guidance notes on logon..... | 152 |
| Chapter 18: Repair the TotalAgility installation..... | 153 |
| Chapter 19: Uninstall TotalAgility..... | 154 |
| Use the installation wizard..... | 154 |
| Use the silent mode..... | 154 |
| Chapter 20: Upgrade process..... | 155 |
| Upgrade TotalAgility components..... | 155 |
| Upgrade TotalAgility databases..... | 156 |
| Upgrade Kofax TotalAgility components including databases..... | 157 |
| Upgrade databases manually..... | 157 |
| Upgrade reporting databases 2.0.2..... | 160 |
| Upgrade TotalAgility in silent mode..... | 160 |
| Chapter 21: Troubleshooting..... | 161 |
| Installation failure in IPv4 and IPv6 environment..... | 161 |
| TotalAgilityAppPool exists..... | 161 |
| Images not displayed in Workspace after scanning..... | 161 |
| Exception during Transformation Designer projects import..... | 162 |
| Download software updates..... | 163 |
| Search feature not working in TotalAgility help..... | 164 |
| Site location invalid error..... | 164 |
| (405) Method not allowed error..... | 164 |
| MimeType error..... | 164 |

Preface

This guide includes instructions for installing and upgrading to Kofax TotalAgility 7.7.0, including:

- Preparations, decisions, precautions, settings, and tips to help you install Kofax TotalAgility.
- Instructions for installing Kofax TotalAgility in silent mode or using the wizard in a client/server or standalone configuration.
- Information about installing other Kofax products used with Kofax TotalAgility.
- Information about updating various TotalAgility configuration files post installation, instead of manually updating each configuration file and the settings separately.

Read this guide completely before installing the software.

Related documentation

The full documentation set for Kofax TotalAgility is available at the following location.

<https://docshield.kofax.com/Portal/Products/KTA/7.7.0-o3xtk9orwd/KTA.htm>

In addition to this guide, the documentation set includes the following items:

- *Kofax TotalAgility Prerequisites Guide*: Provides system requirements for installing TotalAgility, instructions for running the prerequisite utility, and a software checklist for various installation types.
- *Kofax TotalAgility Integration Server Installation Guide*: Describes how to install Kofax Integration Server and integrate it with other products.
- *Kofax TotalAgility On-Premise Multi-Tenancy Installation Guide*: Describes how to install and configure On-Premise Multi-Tenant system.
- *Kofax TotalAgility Configuration Utility Guide*: Explains how to use the Configuration Utility to update settings across various configuration files for different types of installation and deployment.
- *Kofax TotalAgility Administrator's Guide*: Provides information to the administrator on configuring and maintaining a TotalAgility installation.
- *Kofax TotalAgility Architecture Guide*: Provides an overview of the TotalAgility architecture, covering various deployments for on-premise, on-premise multi-tenancy and Azure environments.
- *Kofax TotalAgility Best Practices Guide*: Describes the best practices you must follow when using TotalAgility to improve performance, cost, maintenance, availability and security.
- *Kofax TotalAgility Features Guide*: Provides an overview of the TotalAgility features.
- *Kofax TotalAgility Migration Guide*: Provides information on TotalAgility upgrades from different versions and post upgrade configuration.
- *Kofax TotalAgility Help*: Provides details about using TotalAgility to design business jobs and cases, assign resources, create forms, integrate with external applications, and more.
- *Kofax TotalAgility Workspace Help*: Describes how to use the Workspace to manage activities, jobs, and resources.

- *Kofax TotalAgility On-Premise Multi-Tenant System Help*: Describes how to create and manage tenants using the TotalAgility On-Premise Multi-Tenant system.
- *Kofax TotalAgility Web Capture Control Help*: Provides details on using a Web Capture control in creating multi-page documents, creating a new document in a new folder, deleting pages that have been incorrectly scanned, and more; also, describes the buttons available in a Web Capture control toolbar.
- *Kofax Analytics for TotalAgility Product Features Guide*: Provides an overview of the dashboards that help you track data through the workflow, analyze the effectiveness of the processes and resources, and address business problems.
- *Kofax TotalAgility Tables*: Describes the Kofax TotalAgility tables and fields used by Kofax Analytics for TotalAgility.
- *Migration From Kofax Products Guide*: Provides information about migrating TotalAgility files and Kofax Transformation Modules projects to TotalAgility.

Offline documentation

Customers who require offline documentation can download the individual zip files available on a per language basis, such as Kofax TotalAgilityDocumentation7.7.0_EN.zip and Kofax TotalAgilityDocumentation7.7.0_DE.zip from the [Kofax Fulfillment Site](#).

See [Access the TotalAgility documentation](#) for more information

Training

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

Getting help with Kofax products

The [Kofax Knowledge Base](#) repository contains articles that are updated on a regular basis to keep you informed about Kofax products. We encourage you to use the Knowledge Base to obtain answers to your product questions.

To access the Kofax Knowledge Base, go to the [Kofax website](#) and select **Support** on the home page.

Note The Kofax Knowledge Base is optimized for use with Google Chrome, Mozilla Firefox or Microsoft Edge.

The Kofax Knowledge Base provides:

- Powerful search capabilities to help you quickly locate the information you need.
Type your search terms or phrase into the **Search** box, and then click the search icon.

- Product information, configuration details and documentation, including release news.
Scroll through the Kofax Knowledge Base home page to locate a product family. Then click a product family name to view a list of related articles. Please note that some product families require a valid Kofax Portal login to view related articles.
- Access to the Kofax Customer Portal (for eligible customers).
Click the **Customer Support** link at the top of the page, and then click **Log in to the Customer Portal**.
- Access to the Kofax Partner Portal (for eligible partners).
Click the **Partner Support** link at the top of the page, and then click **Log in to the Partner Portal**.
- Access to Kofax support commitments, lifecycle policies, electronic fulfillment details, and self-service tools.
Scroll to the **General Support** section, click **Support Details**, and then select the appropriate tab.

Chapter 1

Installation planning

The primary source of information about supported operating systems and other Kofax TotalAgility requirements is the Technical Specifications document, which is available on the Kofax website at www.kofax.com.

Review these important notes before you proceed with the installation.

- To view information on the system requirements for installing TotalAgility, instructions for running the prerequisite utility, and the software checklist for various installation types, download the Kofax TotalAgility Prerequisites Guide from the [Kofax Fulfillment Site](#).
- If your solution includes multiple Kofax products, review the Technical Specifications document.
- Obtain a license key for Kofax TotalAgility either from your Account Manager or from Kofax Support.
- Before extracting TotalAgility installation ZIP file, unblock the file from the file properties window.
- Upgrade installations of Transformation Designer that connects to Kofax TotalAgility 7.6.0.
- TotalAgility includes a limited number of VRS Elite licenses. You may need to purchase additional licenses, depending on the number of scanners you plan to use with VRS. See the Kofax Scanner Configurator to verify VRS certification and licensing requirements for your scanner.

Utilities

The following utilities are available on the TotalAgility installation media.

- To ensure all the required software is installed on your computer before installing TotalAgility, run the Prerequisite utility. For more information, see the *Kofax TotalAgility Prerequisites Guide*.
- After installing TotalAgility, you can update the configuration settings by editing each configuration file separately or by running the configuration utility available on the installation media. The utility allows you to modify or update the settings across multiple configuration files at one go instead of editing each file separately. You must manually copy the utility onto each server where the configuration settings are to be modified. See the *Kofax TotalAgility Configuration Utility Guide*.
- To test how an image will look once the eVRS setting is applied to it, run the [EVRSCheck utility](#).

License Proxy

Use TotalAgility License Proxy when the license server is not directly accessible from VRS stations or the linked TotalAgility server, for example, due to security restrictions or on using Azure. Using the License Proxy, you can use a TotalAgility license configuration through TotalAgility web services rather than by directly addressing the license server.

A license proxy is also useful for network topologies where multiple networks are logically separate, such as Microsoft Azure cloud. A License proxy allows computers in Network A to use a TotalAgility license server in Network B. A license proxy uses TotalAgility web services (over HTTP/HTTPS) to communicate with the license server. The license proxy computer needs a working internet connection to facilitate the HTTP/HTTPS traffic to the License server.

See [TotalAgility License Proxy installation](#).

Important If you have previously upgraded from Kofax TotalAgility 7.1.0 to 7.2.0 and are now upgrading to 7.7.0 and want to use License Proxy, then you must manually setup the license proxy on TotalAgility 7.2.0 before upgrading to 7.7.0. This action is not required if directly upgrading from TotalAgility 7.1.0 to 7.7.0.

Licensing information

This section provides information on licensing details.

Concurrent user licensing

In the Concurrent User model, many users can simultaneously log into the system. Each user session consumes a license. For example, if a single user logs into the Designer and the Workspace simultaneously or the user logs into the Designer in two browsers such as Internet Explorer and Chrome, the user consumes two concurrent licenses. When a user logs off from a session, the license server automatically releases the license.

When the number of concurrent users reaches the maximum, the system automatically checks for available reserved licenses. If any reserved license is available, the user can log on and the count of available reserve licenses is reduced by 1. Keep the following items in mind when managing reserved licenses:

- A reserved license expires seven days after you begin using the license.
- You can use each reserved license only twice within 12 months.

If the user tries to log on after the number of concurrent logons reaches the limit and there are no reserved licenses, the system displays an error message and additional users cannot log on.

If a reserved license expires, an error message appears in the TotalAgility Designer and TotalAgility Workspace.

Activate a license in TotalAgility

The license period starts once the license is activated. So you can skip activation during installation and only activate it when you are ready to use TotalAgility.

If you log on to TotalAgility for the first time and the license is not activated, the License Activation window opens.

1. In the **License Activation** window, either click **Next** to accept the default values for the **License Server** and **Port Number**, or enter the new values.
2. Click **Set License Server** to save the information.

3. For further instructions, see [Activate the License Server](#) step in [Perform a standard installation](#) .

Note Should you have issues activating your licence, contact Kofax support at: <http://www.kofax.com/support/tools/>

Automatic recovery

After TotalAgility has been installed, it is possible to manually configure the Kofax License Service to automatically restart in the event of a service error.

1. Go to **Service Control Manger**.
2. Edit the properties for the Kofax License Service.
3. Go to the **Recovery** tab.
4. Configure options for how the service should respond after the first, second, and subsequent failures. You do not need to restart the service for the changes to take effect.

Note You can also do this configuration at the command line. Example:

```
sc.exe failure KSALicenseService actions= restart/660000/  
restart/660000/"/660000 reset= 86400
```

Kofax Message Connector

Kofax Message Connector is a Windows service responsible for importing messages and files in many electronic formats. It retrieves documents from various sources and saves them in its internal storage making them available for retrieval through a web service interface. Kofax TotalAgility connects to the Message Connector web service interface and retrieves the documents for import.

Kofax Message Connector can import messages and files from a number of sources:

- Email messages including attachments using various email protocols (SMTP, POP3, IMAP, EWS).
- Fax messages (via internal fax over IP server or external fax servers: Kofax Communication Server, RightFax, Biscom).
- Files from a local or network folder

For information on prerequisites for the Kofax Message Connector, see the *Kofax TotalAgility Prerequisites Guide* and for information on deployment scenarios and advanced configurations, see the *Kofax TotalAgility Administrator's Guide*.

System limits

Following system limits are applicable for 64-bit installations. For 32-bit installations, these limits may vary.

- The maximum size of a message in Message Connector storage is 8 GB.
- Up to three Message Connector instances on a single computer are allowed.

- For KfxConverter, the maximum system memory usage limit is up to 4 GB.

Note The limit of the input file size may vary depending on the number of pages in a document, type of document and type of conversion.

Reporting Server

Kofax Reporting provides centralized storage of historical operational metrics and audit data. Kofax Reporting includes the components such as the ETL Agent and databases.

Important Due to high process utilization by Transformation Server (99%), Reporting Server is known to produce "SQL Timeout error" when installed on the same machine as Transformation Server. Therefore, you must install Reporting Server separately from Transformation Server.

Kofax VRS Elite

We highly recommend Kofax VRS Elite, a patented image perfection software that dramatically improves scanning productivity and document capture efficiency when used with a VRS-certified scanner. If your scanner is not VRS-certified, you can use the Kofax image processing technology included with TotalAgility.

Several Kofax VRS licensing options are available:

Kofax VRS Basic or Professional OEM

Automatically activate a Kofax VRS Basic or Professional OEM license that is included with many industry-standard scanners. License activation for these scanners is required only when upgrading to Kofax VRS Elite.

Standalone workstation

Manually activate a standalone license, which stays on the workstation until it is deactivated. The standalone license can only be activated on one scan station at a time.

TotalAgility license server

Centrally manage concurrent VRS Elite licenses from the TotalAgility license server.

To centrally manage VRS licenses through the Kofax TotalAgility license server, each VRS station needs to communicate with the license server directly or through a license proxy.

Web Capture Service

To enable web scanning, you must install the Kofax Web Capture Service.

When installing through the browser, you must have administrative rights to complete the installation.

You need to install the Web Capture Service only once, and web scanning is enabled across all the supported browsers.

Install the Kofax Web Capture Service either at the default location or to a custom location.

Temporary files are created under the folder "Interprocess". The user must have read/write access to this folder.

You can also use the Web Capture Service on multiuser environments.

Scan Agent Service

The Scan Agent Service is an asynchronous upload capability, which allows scan operator to continue on to the next batch, without needing to wait for the previous scan job to complete upload.

This service is useful in remote scanning scenarios, where the scan station has limited network bandwidth to the main TotalAgility site.

The capability allows scan operator to keep up with physical scanning throughput, while image upload is done in the background, thus enhancing the scan operator efficiency.

This feature is only available for Scan Create New Job forms.

A Scan Create New Job form automatically uses the asynchronous image upload mode if it detects Scan Agent Service installed on the scan station. Otherwise, it uses the synchronous image upload mode if the Scan Agent Service is not detected.

For Device Create New Job form, a pre-condition of [SCANNED] > 0 must be added to the first activity in a process, to allow the process to wait for all images to be uploaded before moving on to the first activity.

Chapter 2

TotalAgility installation

This chapter describes two methods for installing TotalAgility:

- [Silent installation](#) for multiple servers that use the same configuration.
- [Standard installation](#) using the installation wizard.

You can install TotalAgility as one of the following types:

- **Database Only:** Installs only the database component of Kofax TotalAgility only; no other components are installed.
- **Web Server:** Installs a server to point to any Application server. In case you install TotalAgility on a computer other than the default port, you must enter the Application Server machine name and port number. For example, <appserver_name:82>. A Web server installs the SDK Services and user interfaces for the Designer and Workspace.
- **Application Server:** Installs a server to which remote clients will connect and sets up their web servers. An Application server only installs Core services and does not install user interfaces and any shortcuts for the Designer and Workspace.
- **Web and Application Server:** Installs the Web and Application servers on a single computer.
- **Real Time Transformation Service:** Installs the Real Time Transformation Service.

Note

- You must have administrator account to install TotalAgility.
- Ensure that the user who will run TotalAgility has "Log on as Service" rights.
- You can use hotkeys to navigate to next screen.
- Post installation, you can modify the configuration settings by editing each configuration file separately or running the configuration utility. The configuration utility is available on the installation media. You must manually copy the utility onto each server where the configuration settings are to be modified. See the *Kofax TotalAgility Configuration Utility Guide*.

Perform a silent installation

Use the TotalAgility silent installation to install TotalAgility automatically from a command line or a batch file. After you edit the silent installation file, the installation proceeds without any user interaction.

See also:

- [Silent installation of Web and Application on the same server](#)
- [Silent installation on a separate Web and Application server](#)
- [Silent installation for Real Time Transformation Server](#)

- [Silent installation for Database Only](#)
- [Upgrade TotalAgility in silent mode](#)

Silent installation for Database Only

1. On the installation media, navigate to `\\TotalAgility\TotalAgilityInstall` and open `SilentInstallConfig.xml` using a text editor.
2. In `SilentInstallConfig.xml`, update the following parameters.

| Parameter | Default Value | Description |
|----------------------------|---------------|---|
| DatabaseInformation | | |
| InstallDatabases | true | Installs the databases. Set to false to ignore installing databases. |
| OverwriteIfExisting | false | Set to true to overwrite the existing databases. |
| Main Database | | |
| DatabaseName | TotalAgility | Specify the name of the Main database. |
| Server | server name | Enter the Fully Qualified Domain Name (FQDN) of the server. Note When installing TotalAgility with a remote database, update <code>SilentInstallConfig.xml</code> with the server name (<code><Server>servername</Server></code>) of the machine on which the database resides. The account used to connect to the database during the installation requires DB_CREATOR rights. |
| Security | | |
| WindowsAuthentication | true | Uses Windows credentials for logging in. If set to false, provide the user name and password. Otherwise, leave the user name and password blank. |
| UserName | empty | |
| Password | empty | |
| NewDatabase | false | Set to true to create new database. |
| Audit Database | | |

| Parameter | Default Value | Description |
|-------------------------------|----------------------|---|
| DatabaseName | TotalAgility | Specify the name of the Audit database. |
| Server | server name | Enter the Fully Qualified Domain Name (FQDN) of the server. |
| SqlScript | | |
| CreateScript | Create_Audit.sql | Accept the default. |
| DropScript | Drop_Audit.sql | Accept the default. |
| InitializeScript | Initialise_Audit.sql | Accept the default. |
| ConversionScript | Convert_Audit.SQL | Only required for patch when there are SQL changes. |
| Security | | |
| WindowsAuthentication | true | Uses Windows credentials for logging in. If set to false, provide the user name and password. Otherwise, leave the user name and password blank. |
| UserName | empty | |
| Password | empty | |
| NewDatabase | false | Set to true to create new database. |
| Finished Jobs Database | | |
| DatabaseName | TotalAgility | Specify the name of the Finished Jobs database. |
| Server | server name | Enter the Fully Qualified Domain Name (FQDN) of the server. |
| SqlScript | | |
| CreateScript | Create_Archive.sql | Accept the default. |
| DropScript | Drop_Archive.sql | Accept the default. |
| Conversion Script | Convert_Archive.SQL | Only required for patch when there are SQL changes. |
| Security | | |
| WindowsAuthentication | true | Uses Windows credentials for logging in. If set to false, provide the user name and password. Otherwise, leave the user name and password blank. |
| UserName | empty | |
| Password | empty | |
| NewDatabase | false | Set to true to create new database. |

| Parameter | Default Value | Description |
|--|---------------------------------|--|
| DataLayer - TotalAgility_Documents Database | | |
| DatabaseName | TotalAgility_Documents | Specify the name of the TotalAgility_Documents database. |
| Server | server name | Enter the Fully Qualified Domain Name (FQDN) of the server. |
| SqlScript | | |
| CreateScript | Repository2012_TablesCreate.sql | Accept the default. |
| DropScript | Repository2012_Drop.sql | Accept the default. |
| Conversion Script | Repository2012_Convert.SQL | Only required for patch when there are SQL changes. |
| Security | | |
| WindowsAuthentication | true | Set to true to use Windows credentials for logging in. If set to false, provide the username and password. Otherwise, leave the username and password blank. |
| UserName | empty | |
| Password | empty | |
| NewDatabase | false | Set to true to create new database. |
| Simulator Database | | |
| DatabaseName | TotalAgility_Simulator | Specify the name of the TotalAgility_Simulator database. |
| Server | server name | Enter the Fully Qualified Domain Name (FQDN) of the server. |
| SqlScript | | |
| CreateScript | Create_Simulator.SQL | Accept the default. |
| DropScript | Drop_Simulator.SQL | Accept the default. |
| InitializeScript | empty | Accept the default. |
| Conversion Script | empty | Only required for patch when there are SQL changes. |
| Security | | |
| Windows Authentication | true | Set to true to use Windows credentials for logging in. If set to false, provide the username and password. Otherwise, leave the username and password blank. |
| UserName | empty | |
| Password | empty | |

| Parameter | Default Value | Description |
|-------------------------------------|--|--|
| NewDatabase | false | Set to true to create new database. |
| Reporting_Analytics Database | | |
| DatabaseName | TotalAgility_Reporting | Specify the name of the TotalAgility_Reporting database. |
| Server | server name | Enter the Fully Qualified Domain Name (FQDN) of the server. |
| SqlScript | | |
| CreateScript | Kofax.Reporting.Analytics. SQL_TablesCreate.sql | Accept the default. |
| DropScript | Kofax.Reporting.Analytics. SQL_Drop.sql | Accept the default. |
| InitializeScript | Kofax.Reporting.Analytics. SQL_Initialize.sql | Accept the default. |
| Conversion Script | empty | Only required for patch when SQL changes are needed. |
| Security | | |
| WindowsAuthentication | true | Set to true to use Windows credentials for logging in. If set to false, provide the username and password. Otherwise, leave the username and password blank. |
| UserName | empty | |
| Password | empty | |
| NewDatabase | false | Set to true to create new database. |
| Reporting_Staging Database | | |
| DatabaseName | TotalAgility_Reporting_Staging | Specify the name of the TotalAgility_Reporting_Staging database. |
| Server | server name | Enter the Fully Qualified Domain Name (FQDN) of the server. |
| SqlScript | | |
| CreateScript | Kofax.Reporting.Analytics. Staging.SQL_TablesCreate.sql | Accept the default. |
| DropScript | Kofax.Reporting.Analytics. Staging.SQL_Drop.sql | Accept the default. |
| InitializeScript | Kofax.Reporting.Analytics. Staging.SQL_Initialize.sql | Accept the default. |

| Parameter | Default Value | Description |
|-----------------------|-----------------------|--|
| Conversion Script | Convert_Simulator.SQL | Only required for patch or upgrade when SQL changes are needed. |
| Security | | |
| WindowsAuthentication | true | Uses Windows credentials for logging in. If set to false, provide the user name and password. Otherwise, leave the user name and password blank. |
| UserName | empty | |
| Password | empty | |
| NewDatabase | false | Set to true to create new database. |
| Install Info | | |
| InstallType | Both | Change the value to DatabaseOnly. Note When you install only databases, the system ignores the services, and does not install services such as CoreworkerService, ImportService and ExportService. |
| <SiteRoot> | Default Web Site | Install TotalAgility under a custom site that uses a non-standard port other than the standard ports (80 and 443). For example, create a custom site called "testsite" under IIS using the port number 85. |
| KTAResourceName | empty | Specify a username for the TotalAgility user to be created on installation. |
| KTAResourcePassword | empty | Specify a password (minimum 6 alphanumeric characters) for the TotalAgility user to be created on installation. |
| RunAsSystemAccount | false | Accept the default. Note If you set this parameter to true, the user can still logon using the credentials specified in the Kofax TotalAgility Resource Credentials window when installing TotalAgility. |

3. Save and close the file.

4. On the Command Prompt, change the command line to the root directory of the Setup.exe file.

5. Run `Setup.exe /Silent`.

The databases are installed automatically.

The system generates a log file that reports errors (if any).

The success or failure of installation is indicated in the event log.

When automating the installation, if you run `setup.exe` from the command line, or run `setup.exe` as a silent installation, one of the codes returns to indicate the following:

- 0= Success
- 1= Success with warnings
- 2= Failure

Silent installation of Web and Application on the same server

Update the following parameters for a Web-Application server installation.

1. On the installation media, navigate to `\\TotalAgility\TotalAgilityInstall` and open `SilentInstallConfig.xml` using a text editor.
2. In `SilentInstallConfig.xml`, update the following parameters.

Note Fix the line breaks if you copy and paste the code from this guide.

| Parameter | Default value | Description |
|-------------------------------|---------------|--|
| ServicesInstallOptions | | |
| CoreWorkerService | true | Installs the Core Worker Service. You can set it to false, if needed. |
| ImportService | true | Installs the Import Service. You can set it to false, if needed. |
| ExportService | true | Installs the Export Service. You can set it to false, if needed. |
| ReportingService | true | Installs the Reporting Service. You can set it to false, if needed. |
| LicenseService | true | Installs the License Service. You can set it to false, if needed. |
| TransformationService | true | Installs the Transformation Service. You can set it to false, if needed. |
| CoreServices | true | Installs the Core services. You can set it to false, if needed. |
| LicenseServer | | |
| LicenseServerName | localhost | Enter the name of the license server. |
| PortNumber | 3581 | Do not change this value. |
| SerialNumber | empty | Enter your TotalAgility serial number. |
| ProductCode | empty | Enter your TotalAgility product code. |

| Parameter | Default value | Description |
|----------------------------|--|--|
| SkipLicense | true | Skips activating the license. Set to false to activate the license; you must enter the serial number and product code to install TotalAgility. |
| InstallDirectory | C:\Program Files\ Kofax\TotalAgility | Specify the TotalAgility destination directory. |
| DatabaseInformation | | |
| InstallDatabases | true | Installs the databases. Set to false to ignore installing databases. |
| OverwriteIfExisting | true | Overwrites the existing databases. |
| ScriptsLocation | C:\Program Files \Kofax\TotalAgility \DatabaseScripts\SQL Server\ | Specify the directory for installing scripts. |
| Main Database | | |
| DatabaseName | TotalAgility | Specify the name of the Main database. |
| Server | server name | Specify the fully qualified domain name (FQDN) of the server. Note When installing TotalAgility with a remote database, update SilentInstallConfig.xml with the server name (<Server>servername</Server>) of the machine on which the database resides. The account used to connect to the database during the installation requires DB_CREATOR rights. |
| Security | | |
| WindowsAuthentication | true | Uses Windows credentials for logging in. If set to false, provide the user name and password. Otherwise, leave the user name and password blank. |
| UserName | empty | |
| Password | empty | |
| NewDatabase | false | Set to true to create new database. |
| Audit Database | | |
| DatabaseName | TotalAgility | Specify the name of the Audit database. |
| Server | server name | Specify the fully qualified domain name (FQDN) of the server. |

| Parameter | Default value | Description |
|--|------------------------|--|
| Security | | |
| WindowsAuthentication | true | Uses Windows credentials for logging in. If set to false, provide the user name and password. Otherwise, leave the user name and password blank. |
| UserName | empty | |
| Password | empty | |
| NewDatabase | false | Set to true to create new database. |
| Finished Jobs Database | | |
| DatabaseName | TotalAgility | Specify the name of the Finished Jobs database. |
| Server | server name | Specify the fully qualified domain name (FQDN) of the server. |
| Security | | |
| WindowsAuthentication | true | Uses Windows credentials for logging in. If set to false, provide the user name and password. Otherwise, leave the user name and password blank. |
| UserName | empty | |
| Password | empty | |
| NewDatabase | false | Set to true to create new database. |
| Forms | empty | |
| DataLayer - TotalAgility_Documents Database | | |
| DatabaseName | TotalAgility_Documents | Specify the name of the TotalAgility_Documents database. |
| Server | server name | Specify the fully qualified domain name (FQDN) of the server. |
| Security | | |
| WindowsAuthentication | true | Uses Windows credentials for logging in. If set to false, provide the user name and password. Otherwise, leave the user name and password blank. |
| UserName | empty | |
| Password | empty | |
| NewDatabase | false | Set to true to create new database. |
| Simulator Database | | |
| DatabaseName | TotalAgility_Simulator | Specify the name of the TotalAgility_Simulator database. |

| Parameter | Default value | Description |
|-------------------------------------|---------------------------------|--|
| Server | server name | Specify the fully qualified domain name (FQDN) of the server. |
| Security | | |
| Windows Authentication | true | Uses Windows credentials for logging in. If set to false, provide the user name and password. Otherwise, leave the user name and password blank. |
| UserName | empty | |
| Password | empty | |
| NewDatabase | false | Set to true to create new database. |
| Reporting_Analytics Database | | |
| DatabaseName | TotalAgility_Reporting | |
| Server | server name | Specify the fully qualified domain name (FQDN) of the server. |
| Security | | |
| WindowsAuthentication | true | Uses Windows credentials for logging in. If set to false, provide the user name and password. Otherwise, leave the user name and password blank. |
| UserName | empty | |
| Password | empty | |
| NewDatabase | false | Set to true to create new database. |
| Reporting_Staging Database | | |
| DatabaseName | TotalAgility_Reporting_ Staging | Specify the name of the TotalAgility_Reporting_ Staging database. |
| Server | server name | Specify the fully qualified domain name (FQDN) of the server. |
| Security | | |
| WindowsAuthentication | true | Uses Windows credentials for logging in. If set to false, provide the user name and password. Otherwise, leave the user name and password blank. |
| UserName | empty | |
| Password | empty | |
| NewDatabase | false | Set to true to create new database. |
| Identity Information | | |
| UserName | username | Enter the user name of the Windows service account for the TotalAgility services. |

| Parameter | Default value | Description |
|--|---------------|--|
| Password | password | Enter the password of the windows service account for the TotalAgility services. |
| RunAsSystemAccount | false | Accept the default. If you set this parameter to true: <ul style="list-style-type: none"> The AppPool and Kofax TotalAgility services are created with LocalSystem account. The databases should be created using SQL authentication. The user can still logon using the credentials specified in the Kofax TotalAgility Resource Credentials window when installing TotalAgility. |
| RunAsNetworkServiceAccount | false | If set to true, the AppPool and Kofax TotalAgility services are created with the NT Authority\Network Service username. Note If you set this parameter to true, databases should be created using SQL authentication. |
| Prerequisite Info | | |
| ValidOS | true | Checks if the Operating System is valid. |
| SQLServerInstalled | true | Set to true to check if the SQL Server is installed. |
| SQLClientInstalled | false | Set to true to check if the SQL Client is installed. |
| IISInstalled | true | Checks if IIS is installed. |
| SslEnabled | false | Set to true to enable https. See Configure for HTTPS communication . |
| Install Info | | |
| InstallAction | Install | Accept the default. |
| InstallMode | Silent | Accept the default. |
| InstallType | Both | Accept the default. |
| AuthenticationMode | Windows | Set the authentication mode to Windows. |
| Transformation Server Info | | |
| Note Configure these settings if TransformationService is "true". | | |

| Parameter | Default value | Description |
|------------------------|---|---|
| TSConfigFile | empty | Specify the path to .ini file along with the name for Transformation Server to configure. Important If you provide the .ini file, the TransformationServerInfo settings are taken from the .ini file; the parameters mentioned in the SilentInstallConfig are ignored. See the .INI file Sample for the parameters. |
| LogFile | C:\Program Files \Kofax\TotalAgility \Transformation Server \Tslog.txt | Set the location where the Transformation Server log file will be created. If the log file path is not valid, the Transformation Server installation fails. Example: C:\Program Files \Kofax\TotalAgility \TransformationServer \TSLog.txt |
| InstallLocation | C:\Program Files \Kofax\TotalAgility \TransformationServer | To install to a different location, specify the Transformation Server destination directory. |
| WindowsServiceAccount | username | Enter the name of the user who will run the Transformation Server. To specify a domain user, enter the user name in the format Domain\User. Ensure that the account details are correct, as under this account Transformation Server authenticates in all places where Windows authentication is used. Example: TA database. All communication and resource access will be run under this account. Therefore, the account under which Transformation Server is running must be not some dummy account. |
| WindowsServicePassword | password | Enter the password for the user. |
| UseSpecificPool | false | Set this parameter to true to add this Transformation Server to a pool. Any other value, including no value, is treated as false and the Transformation Server process all activities regardless of pool. |

| Parameter | Default value | Description |
|----------------------|---------------|--|
| PoolName | empty | <p>If you set UseSpecificPool=true, enter the Transformation Server pool name.</p> <p>Note If you leave the pool name empty, all activities are processed regardless of their pools.</p> |
| OLEnabled | true | <p>Enables online learning tasks on this Transformation Server instance.</p> <p>Set to false or any other value to disable online learning tasks.</p> <p>Note In case where multiple instances of Transformation Server are installed for improving the throughput of the capture activities, online learning should be enabled only on a single transformation server instance in the cluster.</p> |
| WcfPort | 9001 | Enter the port that is used by TotalAgility to communicate with Transformation Server during synchronous calls, such as fuzzy searches and pushed activities. |
| ReservedSlots | 0 | Enter the number of slots on this Transformation Server that are reserved for pushed activities and high-priority activities. |
| OverrideDefSlots | Empty | <p>By default, the Transformation Server determines the number of simultaneously working Transformation Server controlled processes that do actual processing based on the machine CPU cores.</p> <p>To specify your own values, enter the value here.</p> |
| MaxSlots | 0 | If you set CPUSERVER_OVERRIDE_DEF_SLOTS to true, enter the number of processing slots for this Transformation Server. |
| EnableSyncCalls | true | <p>Enables synchronous calls.</p> <p>Set to false to disable synchronous calls.</p> |
| IsIntegration Server | false | Set to true to install the TotalAgility Integration Server. |
| InstallLicenseProxy | false | <p>Set to true to install License Proxy.</p> <p>If set to true, provide the username and password. Otherwise, leave the username and password blank.</p> |
| KTAResourceName | empty | Specify a username for the TotalAgility user to be created on installation. |

| Parameter | Default value | Description |
|-------------------------------|------------------|---|
| KTAResourcePassword | empty | Specify a password (minimum 6 alphanumeric characters) for the TotalAgility user to be created on installation. |
| StartServices | true | Starts the services. |
| ImportWorkspacePackage | false | Set to true to import Workspace package. |
| <SiteRoot> | Default Web Site | Install TotalAgility under a custom site that uses a non-standard port other than the standard ports (80 and 443). For example, create a custom site called "testsite" under IIS using the port number 85. |

3. Save and close the file.
4. On the Command Prompt, change the command line to the root directory of the Setup.exe file.
5. Run `Setup.exe /Silent`.

Based on the parameters set to **True** in the silent configuration file, the following items are installed:

- Kofax TotalAgility
- Kofax Import Connector (KIC)
- Kofax Transformation Designer

Note

- Transformation Designer is installed only when the TransformationDesignerInstaller.exe is available in the TotalAgility build folder.
- When you install Kofax TotalAgility from a network share, make sure the user has the Write permissions to the share; otherwise, the Import Connector will not get installed successfully.

- Utility for Kofax Export Connector
- Licensing Service
- Transformation Server, if the "**TransformationService**" parameter is set to true and the following parameters are set for Transformation Server:
 - WindowsServiceAccount
 - WindowsServicePassword

The system generates a log file that reports any errors.

The success or failure of installation is indicated in the event log.

When automating the installation, if you run setup.exe from the command line, or run setup.exe as a silent installation, one of the codes returns to indicate the following:

- 0= Success
- 1= Success with warnings
- 2= Failure

.INI file sample

```
TS_SERVICE_ACCOUNT=username
TS_SERVICE_PASSWORD=password
TS_USE_SPECIFIC_POOL=FALSE
TS_POOL_NAME=
TS_OL_ENABLED=TRUE
TS_WCF_PORT=9001
TS_RESERVED_SLOTS=0
TS_OVERRIDE_DEF_SLOTS=
TS_MAX_SLOTS=0
TS_ENABLE_SYNC_CALLS=TRUE
TS_MAIN_DB_CONNECTION_STRING=Server=servername;Trusted_Connection=Yes;Database=TotalAgility;
TS_SYNCHRONOUS_ONLY=false
```

Silent installation on a separate Web and Application server

Install TotalAgility on a separate Web or Application server.

Silent installation on an Application Server

Update the following parameters for an Application Server.

1. On the installation media, navigate to `\\TotalAgility\TotalAgilityInstall` and open `SilentInstallConfig.xml` using a text editor.
2. In `SilentInstallConfig.xml`, update the following parameters.
 - `InstallType = ApplicationServer`.
 - For other parameters, see [Silent installation of Web and Application on the same server](#).

Note You can choose to install or not to install certain components by setting the values to True/False in the **ServicesInstallOptions** section of the Silent Configuration file.

3. Save and close the file.
4. On the Command Prompt, change the command line to the root directory of the Setup.exe file.

5. Run `Setup.exe /Silent`.

Based on the parameters set to **True** in the silent configuration file, the following items are installed:

- Kofax TotalAgility
- Kofax Import Connector (KIC)
- Kofax Transformation Designer

Note

- Transformation Designer is installed only when the Transformation DesignerInstaller.exe is available in the TotalAgility build folder.
- When you install Kofax TotalAgility from a network share, make sure the user has the Write permissions to the share; otherwise, the Import Connector will not get installed successfully.

- Utility for Kofax Export Connector
- Licensing Service
- Transformation Server, if the "**TransformationService**" parameter is set to true and the following parameters are set for Transformation Server:
 - WindowsServiceAccount
 - WindowsServicePassword

The system generates a log file that reports errors (if any).

The success or failure of installation is indicated in the event log.

When automating the installation, if you run `setup.exe` from the command line, or run `setup.exe` as a silent installation, one of the codes returns to indicate the following:

- 0= Success
- 1= Success with warnings
- 2= Failure

Silent installation on a Web Server

1. On the installation media, navigate to `\\TotalAgility\TotalAgilityInstall` and open `SilentInstallConfig.xml` using a text editor.
2. In `SilentInstallConfig.xml`, update the following parameters.

| Parameter | Default | Description |
|------------------------------|--|--|
| InstallDirectory | C:\Program Files\ Kofax\ TotalAgility | Specify the TotalAgility destination directory. |
| ApplicationServerName | no default | Enter the Fully Qualified Domain Name (FQDN) of the application server. <div style="background-color: #f0f0f0; padding: 5px; border: 1px solid #ccc;"> <p>Note If the Application server is installed on a non-standard port, you must modify the <code><ApplicationServerName></code> parameter in the <code>SilentInstallConfig.xml</code> on the Web server as follows:</p> <pre><ApplicationServerName>FQDN:portnumber <ApplicationServerName>"</pre> </div> |

| Parameter | Default | Description |
|-----------------------------|------------------|--|
| Identity Information | | |
| UserName | username | Enter the name of the user who will run TotalAgility if RunAsSystemAccount is false. |
| Password | password | Enter the password for the user who will run TotalAgility if RunAsSystemAccount is false. |
| RunAsSystemAccount | false | Accept the default. If set to true, the AppPool and Kofax TotalAgility services are created with LocalSystem account. Note If you set this parameter to true, databases should be created using SQL authentication. |
| RunAsNetworkService Account | false | If set to true, the AppPool and Kofax TotalAgility services are created with the NT Authority\Network Service username. Note If you set this parameter to true, databases should be created using SQL authentication. |
| Prerequisite Info | | |
| ValidOS | true | Set to true to check if the Operating System is valid. |
| SQLServerInstalled | true | Set to true to check if the SQL Server is installed. |
| SQLClientInstalled | false | Set to true to check if the SQL Client is installed. |
| IISInstalled | true | Set to true to check if IIS is installed. |
| SslEnabled | false | Set to true to enable https. See Configure for HTTPS Communication . |
| Install Info | | |
| InstallAction | Install | Accept the default. |
| InstallMode | Silent | Accept the default. |
| InstallType | Both | Enter WebServer. |
| <SiteRoot> | Default Web Site | Install TotalAgility under a custom site that uses a non-standard port other than the standard ports (80 and 443). For example, create a custom site called "testsite" under IIS using the port number 85. |

3. Save and close the file.
4. On the Command Prompt, change the command line to the root directory of the Setup.exe file.

5. Run `Setup.exe /Silent`.

The Kofax TotalAgility is installed automatically.

The system generates a log file that reports errors (if any).

The success or failure of installation is indicated in the event log.

When automating the installation, if you run `setup.exe` from the command line, or run `setup.exe` as a silent installation, one of the codes returns to indicate the following:

- 0= Success
- 1= Success with warnings
- 2= Failure

Silent installation for Real Time Transformation Server

1. On the installation media, navigate to `\\TotalAgility\TotalAgilityInstall` and open `SilentInstallConfig.xml` using a text editor.
2. In `SilentInstallConfig.xml`, update the following parameters.

| Parameter | Default Value | Description |
|-----------------------------|--|---|
| InstallDirectory | C:\Program Files\ Kofax\ TotalAgility | Specify the TotalAgility destination directory. |
| DatabasesInformation | | |
| InstallDatabases | false | Set to false to ignore installing databases. |
| OverwriteIfExisting | false | Set to true to overwrite the existing databases. |
| Main Database | | |
| DatabaseName | TotalAgility | Specify the name of the Main database. |
| Server | Server name | Specify the fully qualified domain name (FQDN) of the server. <div style="border: 1px solid gray; padding: 5px; background-color: #f0f0f0;"> <p>Note When installing TotalAgility with a remote database, update <code>SilentInstallConfig.xml</code> with the server name (<code><Server>servername</Server></code>) of the machine on which the database resides. The account used to connect to the database during the installation requires <code>DB_CREATOR</code> rights.</p> </div> |
| SqlScript | | |
| CreateScript | Create_Main.SQL | Accept the default. |
| DropScript | Drop_Main.sql | Accept the default. |
| InitializeScript | Initialise_Main.sql | Accept the default. |

| Parameter | Default Value | Description |
|-------------------------------|----------------------|---|
| ConversionScript | Convert_Main.SQL | Only required for patch when there are SQL changes. |
| Security | | |
| WindowsAuthentication | true | Set to true to use Windows credentials for logging in. If set to false, provide the username and password. Otherwise, leave the username and password blank. |
| UserName | empty | |
| Password | empty | |
| NewDatabase | false | Set to true to create new database. |
| Audit Database | | |
| DatabaseName | TotalAgility | Specify the name of the Audit database. |
| Server | server name | Specify the fully qualified domain name (FQDN) of the server. |
| SqlScript | | |
| CreateScript | Create_Audit.sql | Accept the default. |
| DropScript | Drop_Audit.sql | Accept the default. |
| InitializeScript | Initialise_Audit.sql | Accept the default. |
| ConversionScript | Convert_Audit.SQL | Only required for patch when there are SQL changes. |
| Security | | |
| WindowsAuthentication | true | Set to true to use Windows credentials for logging in. If set to false, provide the username and password. Otherwise, leave the username and password blank. |
| UserName | empty | |
| Password | empty | |
| NewDatabase | false | Set to true to create new database. |
| Finished Jobs Database | | |
| DatabaseName | TotalAgility | Specify the name of the Finished Jobs database. |
| Server | server name | Specify the fully qualified domain name (FQDN) of the server. |
| SqlScript | | |
| CreateScript | Create_Archive.sql | Accept the default. |
| DropScript | Drop_Archive.sql | Accept the default. |

| Parameter | Default Value | Description |
|--|---------------------------------|---|
| Conversion Script | Convert_Archive.SQL | Only required for patch when there are SQL changes. |
| Security | | |
| WindowsAuthentication | true | Set to true to use Windows credentials for logging in. If set to false, provide the username and password. Otherwise, leave the username and password blank. |
| UserName | empty | |
| Password | empty | |
| NewDatabase | false | Set to true to create new database. |
| DataLayer - TotalAgility_Documents Database | | |
| DatabaseName | TotalAgility_Documents | Specify the name of the TotalAgility_Documents database. |
| Server | server name | Specify the fully qualified domain name (FQDN) of the server. |
| SqlScript | | |
| CreateScript | Repository2012_TablesCreate.sql | Accept the default. |
| DropScript | Repository2012_Drop.sql | Accept the default. |
| Conversion Script | Repository2012_Convert.SQL | Only required for patch when there are SQL changes. |
| Security | | |
| WindowsAuthentication | true | Set to true to use Windows credentials for logging in. If set to false, provide the username and password. Otherwise, leave the username and password blank. |
| UserName | empty | |
| Password | empty | |
| NewDatabase | false | Set to true to create new database. |
| Simulator Database | | |
| DatabaseName | TotalAgility_Simulator | Specify the name of the TotalAgility_Simulator database. |
| Server | server name | Specify the fully qualified domain name (FQDN) of the server. |
| SqlScript | | |
| CreateScript | Create_Simulator.SQL | Accept the default. |
| DropScript | Drop_Simulator.SQL | Accept the default. |
| InitializeScript | empty | Accept the default. |

| Parameter | Default Value | Description |
|-------------------------------------|--|---|
| Conversion Script | empty | Only required for patch when there are SQL changes. |
| Security | | |
| Windows Authentication | true | Set to true to use Windows credentials for logging in. If set to false, provide the username and password. Otherwise, leave the username and password blank. |
| UserName | empty | |
| Password | empty | |
| NewDatabase | false | Set to true to create new database. |
| Reporting_Analytics Database | | |
| DatabaseName | TotalAgility_Reporting | Specify the name of the TotalAgility_Reporting database. |
| Server | server name | Specify the fully qualified domain name (FQDN) of the server. |
| SqlScript | | |
| CreateScript | Kofax.Reporting.Analytics. SQL_TablesCreate.sql | Accept the default. |
| DropScript | Kofax.Reporting.Analytics. SQL_Drop.sql | Accept the default. |
| InitializeScript | Kofax.Reporting.Analytics. SQL_Initialize.sql | Accept the default. |
| Conversion Script | empty | Only required for patch when SQL changes are needed. |
| Security | | |
| WindowsAuthentication | true | Set to true to use Windows credentials for logging in. If set to false, provide the username and password. Otherwise, leave the username and password blank. |
| UserName | empty | |
| Password | empty | |
| NewDatabase | false | Set to true to create new database. |
| Reporting_Staging Database | | |
| DatabaseName | TotalAgility_Reporting_Staging | Specify the name of the TotalAgility_Reporting_Staging database. |
| Server | server name | Specify the fully qualified domain name (FQDN) of the server. |

| Parameter | Default Value | Description |
|-----------------------------|---|--|
| SqlScript | | |
| CreateScript | Kofax.Reporting.Analytics. Staging.SQL_ TablesCreate.sql | Accept the default. |
| DropScript | Kofax.Reporting.Analytics. Staging.SQL_ Drop.sql | Accept the default. |
| InitializeScript | Kofax.Reporting.Analytics. Staging.SQL_ Initialize.sql | Accept the default. |
| Conversion Script | empty | Only required for patch when SQL changes are needed. |
| Security | | |
| WindowsAuthentication | true | Set to true to use Windows credentials for logging in. If set to false, provide the username and password. Otherwise, leave the username and password blank. |
| UserName | empty | |
| Password | empty | |
| NewDatabase | false | Set to true to create new database. |
| Identity Information | | |
| UserName | username | Enter the user name of the Windows service account for the TotalAgility services. |
| Password | password | Enter the password of the windows service account for the TotalAgility services. |
| RunAsSystemAccount | false | Accept the default. If set to true, the AppPool and Kofax TotalAgility services are created with LocalSystem account. Note When you set this parameter to true, databases should be created using SQL authentication. |
| RunAsNetworkServiceAccount | false | If set to true, the AppPool and Kofax TotalAgility services are created with the NT Authority\Network Service username. Note When you set this parameter to true, databases should be created using SQL authentication. |

| Parameter | Default Value | Description |
|-----------------------------------|--|---|
| Install Info | | |
| InstallType | RTTS | Accept the default. Note When you install RTTS, it ignores the services. The services such as CoreworkerService, ImportService, ExportService are not installed. |
| SslEnabled | false | You can set to true to enable https. See Configure for HTTPS Communication . |
| Transformation Server Info | | |
| TransformationService | true | Accept the default. |
| TSConfigFile | no default | Specify the path to .ini file along with the name for Transformation Server to configure. Important If you provide the .ini file, the TransformationServerInfo settings are taken from the .ini file; the parameters mentioned in the SilentInstallConfig are ignored. See the .INI file Sample for the parameters. |
| LogFile | C:\Program Files \Kofax\TotalAgility \Transformation Server \Tslog.txt | Specify the location where the Transformation Server log file will be created. If the log file path is not valid, the Transformation Server installation fails. Example: C:\Program Files \Kofax\TotalAgility \TransformationServer\Tslog.txt |
| InstallLocation | For example, C:\Program Files (x86)\Kofax\TotalAgility\ TransformationServer | Specify the Transformation Server destination directory. |
| WindowsServiceAccount | username | Enter the name of the user who will run the Transformation Server. |
| WindowsServicePassword | password | Enter the password for the user. |
| UseSpecificPool | false | Set true to add this Transformation Server to a pool. Set false (or leave blank or assign any other value) to have Transformation Server process all activities regardless of pool. |

| Parameter | Default Value | Description |
|------------------|---------------|--|
| PoolName | empty | If you set UseSpecificPool=true, enter the Transformation Server pool name. Note If you leave the pool name empty, all activities are processed regardless of their pools. |
| OLEnabled | true | Set to true to enable online learning tasks on this Transformation Server instance. Set to false or any other value to disable online learning tasks. Note In case where multiple instances of Transformation Server are installed for improving the throughput of the capture activities, online learning should be enabled only on a single transformation server instance in the cluster. |
| WcfPort | 9001 | Enter the port that is used by TotalAgility to communicate with Transformation Server during synchronous calls (such as fuzzy searches and pushed activities). |
| ReservedSlots | 0 | Enter the number of slots on this Transformation Server that are reserved for pushed activities and high-priority activities. |
| OverrideDefSlots | empty (false) | To override the default number of processing slots for this Transformation Server, set this parameter to true. Any other value, including empty, is treated as false and the system automatically sets the default number of processing slots based on the system configuration. |
| MaxSlots | 0 | If you set CPUSERVER_OVERRIDE_DEF_SLOTS to true, enter the number of processing slots for this Transformation Server. |
| EnableSyncCalls | true | Set to true to enable synchronous calls or false to disable these calls. |

| Parameter | Default Value | Description |
|----------------------|------------------|---|
| <InstallSynchronous> | false | <p>Set true to install the Transformation Server in a synchronous mode.</p> <p>Specify the port number (default: 9001) for the Transformation Server service. The port number is stored in the TotalAgility Web.config file as an application setting:</p> <pre><add key="TSExternalServicePortFor SyncProcessing" value="9001" /></pre> <p>Note If you wish to change the default port number, you must update the Web.config file and restart the Kofax TotalAgility IIS Application Pool.</p> |
| StartServices | true | |
| <SiteRoot> | Default Web Site | <p>Install TotalAgility under a custom site that uses a non-standard port other than the standard ports (80 and 443).</p> <p>For example, create a custom site called "testsite" under IIS using the port number 85.</p> |

3. Save and close the file.
4. On the Command Prompt, change the command line to the root directory of the Setup.exe file.
5. Run `Setup.exe /Silent`.
The Real Time Transformation Server is installed. The Real Time Transformation Service sets up Transformation Server in a synchronous mode and configures the core and SDK APIs of TotalAgility which clients can invoke.
The system generates a log file that reports errors (if any).
The success or failure of installation is indicated in the event log.
When automating the installation, if you run `setup.exe` from the command line, or run `setup.exe` as a silent installation, one of the codes returns to indicate the following:
 - 0= Success
 - 1= Success with warnings
 - 2= Failure
6. To ensure that the installation works as expected, perform the following steps.
 - a. Navigate to and edit the `web.config` file that is located at `<%Program Files%>/Kofax/TotalAgility/Agility.Server.Web`.
 - b. Locate the `TransformationServerExternalService_Binding` binding parameter and ensure that the `transport clientCredentialType` value is set to `Windows`.
 - c. Save and close the `web.config` file.

Upgrade TotalAgility in silent mode

When upgrading to TotalAgility 7.7.0, do the following.

1. Go to the root directory of setup.exe.
2. Navigate to `\\TotalAgility\TotalAgilityInstall` and open `SilentInstallConfig.xml` using a text editor.
3. In `SilentInstallConfig.xml`, update the following parameters.

| Parameter | Default value | Description |
|-----------------------------|-------------------------------|---|
| Identity Information | | |
| UserName | username | Enter the name of the user who will run TotalAgility. |
| Password | password | Enter the password for the user who will run TotalAgility. |
| Install Info | | |
| InstallAction | upgrade | Use this setting to upgrade TotalAgility components including databases. |
| | upgradeTotalAgilitydatabases | Use this setting only if you are upgrading the databases before upgrading TotalAgility components. <div style="background-color: #f0f0f0; padding: 10px;"> <p>Note If you wish to upgrade TotalAgility components before upgrading databases, you must do the following:</p> <ol style="list-style-type: none"> a. Open <code>SilentInstallConfig.xml</code> available at the following location: <pre>\\TotalAgility Installation Information \Kofax TotalAgility</pre> b. Update the <code><InstallAction></code> section with the following parameter: <code><InstallAction>=Upgradedatabasesfor existingTotalAgility</code> c. Run <code>Setup.exe /Silent /U</code> from the above mentioned path. </div> |
| | upgradeTotalAgilitycomponents | Use this setting to upgrade only TotalAgility components. |
| StartServices | true | Starts the services automatically after upgrade installation. Set to false to start the services manually after upgrade installation. |

| Parameter | Default value | Description |
|-------------------------------|---------------|--|
| ImportWorkspacepackage | false | Set to true to import the Workspace package after upgrade installation. Note Review the Kofax TotalAgility Release Notes to import the required updates for the Workspace package. |

4. Open the Command Prompt window as an Administrator and change the command line to the root directory of the Setup.exe file.
5. Run `Setup.exe /Silent /Upgrade`.
Based on the parameters set to true in the silent configuration file, the following items are upgraded automatically:
 - Kofax TotalAgility
 - Kofax Import Connector (KIC)
 - Kofax Transformation Designer
 - Utility for Kofax Export Connector

The system generates a log file which reports errors (if any).
The success or failure of installation is indicated in the event log.
6. Save and close the file.

Perform a standard installation

You can install TotalAgility using the standard installer wizard.

When you run the installation wizard for the Application Server or the Web/Application Server, based on the installation type selected, following items are installed:

- TotalAgility
- Kofax Import Connector
- Transformation Designer

Note

- Transformation Designer is installed only when the TransformationDesignerInstaller.exe is available in the TotalAgility installation folder.
- When you install Kofax TotalAgility from a network share, make sure the user has the Write permissions to the share; otherwise, the Import Connector will not get installed successfully.

- Utility for Kofax Export Connector
- Licensing Service
- Reporting Service

Note The reporting client is installed automatically on the Transformation Server and during the TotalAgility server installation.

Install Database Only

1. Navigate to \\TotalAgility\TotalAgility Install on the installation media and run one of the following commands:
 - If UAC (User Account Control) is enabled, right-click Setup.exe and select **Run As Administrator**.
 - If UAC is not enabled, run **Setup.exe**.

The system starts the installation.

2. In the Kofax TotalAgility **Installation Program** window, click **Next** or press Enter to move to the next window.

Note To exit the setup, click **Cancel** or press Esc.

3. In the Kofax **Inc. Software License Agreement** window, accept the terms in the License Agreement and click **Next**.
4. In the **Type of Install** window, select **Database Only** (default: Web/Application Server) and click **Next**.

The **Databases** window opens.

5. Do one of the following:
 - By default **Install Databases** is selected. Click **Next** to install the databases.
 - If the database server already contains the same databases and you want to overwrite the existing databases, select the **Overwrite databases if they exist?** check box and click **Next**. Click **Yes** to confirm overwriting the databases.
 - If you want to provide the database server for each database do the following: enter a database name; click ellipsis for **Server** and choose the mode of database server; in the **Security** group, either use **Windows Authentication**, or select the SQL Server authentication providing the user name and password, and then click **OK**. If all the databases reside on the same server, select the **Apply these settings to all other Databases** check box.

6. Click **Next**.

The **DB Connection Results** window opens and displays the results of connecting to databases.

7. Click **Next**.

The **Software Checks** window displays the list of detected software. TotalAgility requires certain software to be installed on your system before installing TotalAgility.

8. Review the **Detected Software** list and proceed as follows:

- If your system does not have all the required software, click **Cancel** to close the installer and install the software.
- If your system has all the required software, click **Next**.

The **Kofax TotalAgility Resource Credentials** window opens.

9. Enter the credentials (**Username**, **Password** (minimum 6 alphanumeric characters) and **Confirm** password) for the user to be created on installation.

By default, the username field displays the name of the logged on user. You can specify a different user name, as required.

10. Click **Next**.

The **Installation Review** window opens and displays the settings.

11. Review the settings and click **Next** to start the installation.
The **Installation Progress** window displays the progress of installation. The setup installs the required files, databases, and other integrated products.

The **Licensing** window opens.

12. To connect to the license server, do the following:
 - a. In the **License Server** field, enter the location of the License Server.

Note To connect to a shared License Server, enter the name or the IP address of a shared License Server.

- b. In the **Port Number** field, enter the port number on which the License Server listens. Alternatively, click **Skip** if you want to skip connecting to the License Server now but connect when launching TotalAgility.

13. Click **Next**.

The Kofax TotalAgility Installation Complete window displays the installation summary.

If any errors occur during the installation, TotalAgility creates a log file called Kofax TotalAgility.txt on your desktop. Check this log file for error details. The success or failure of installation is indicated in the event log.

14. Click **Finish**.

Your installation is now complete.

See also:

- [Perform a standard installation](#)
- [Install Application Server](#)
- [Install Web and Application Server](#)
- [Install Web Server](#)
- [Install Real Time Transformation Server](#)

Install Web Server

1. Navigate to \\TotalAgility\TotalAgility\Install on the installation media and run one of the following commands:
 - If UAC (User Account Control) is enabled, right-click Setup.exe and select **Run As Administrator**.
 - If UAC is not enabled, run **Setup.exe**.

The system starts the installation.

2. In the **Kofax TotalAgility Installation Program** window, click **Next** or press Enter to move to the next window.

Note To exit the setup, click **Cancel** or press Esc.

3. In the **Kofax Inc. Software License Agreement** window, accept the terms in the License Agreement and click **Next**.
4. In the **Type of install** window, select **Web Server** (default: Web/Application Server) and click **Next**. The **Destination** window opens.
5. Use the default installation folder or click **Browse** to select a different path, and click **Next**. The **Choose Server Location with Options** window opens.

6. In the **Server Name** field enter the name of your existing TotalAgility application server. The name must be a fully qualified, such as `<machinename>.<fullyqualifieddomainname>:<portnumber>`.

Note The port number is only required if it is other than port 80.

7. To support SSL, select the **Support SSL** check box.

Note The SSL option is only available if you have configured the https binding in IIS. See [Configure TotalAgility for HTTPS Communication](#).

8. Click **Next**.

The **Credentials** window opens.

9. Enter the credentials (Password and Confirm password) for the user who will run TotalAgility.
10. On the **Root Website to host TotalAgility Application** list, select the website to host the TotalAgility application. By default, the **Default Web Site** is selected.

Note The websites added in IIS Manager appear on this list. To add a website in IIS Manager, click `Start > Run > Inetmgr > Sites > Add Web Site`.

11. Do either of the following for **Windows Authentication**:

- To log on automatically to TotalAgility Designer and Workspace, keep the **Windows Authentication** check box selected (default).
- To log on manually to TotalAgility Designer and Workspace, clear the **Windows Authentication** check box.

12. Click **Next**.

The **Software Checks** window displays the list of detected software. TotalAgility requires certain software to be installed on your system before installing TotalAgility.

13. Review the **Detected Software** list and proceed as follows:

- If your system does not have all the required software, click **Cancel** to close the installer and install the software.
- If your system has all the required software, click **Next**. The **Install Options** window opens.

14. Click **Next**.

The **Installation Review** window opens and displays the settings.

15. Review the settings and click **Next** start the installation.

The **Installation Progress** window opens. The setup installs the required files, databases, and other integrated products.

If any errors occur during installation, TotalAgility creates a log file called Kofax TotalAgility.txt on your desktop. Check this log file for error details. The success or failure of installation is indicated in the event log.

16. Click **Finish**.

Your installation is now complete.

See also:

- [Perform a standard installation](#)
- [Install Database Only](#)
- [Install Application Server](#)

- [Install Web and Application Server](#)
- [Install Real Time Transformation Server](#)

Install Application Server

1. Navigate to \\TotalAgility\TotalAgility Install on the installation media and run one of the following commands:
 - If UAC (User Account Control) is enabled, right-click Setup.exe and select **Run As Administrator**.
 - If UAC is not enabled, run **Setup.exe**.

The system starts the installation.

2. In the **Kofax TotalAgility Installation Program** window, click **Next** or press Enter to move to the next window.

Note To exit the setup, click **Cancel** or press Esc.

3. In the **Kofax Inc. Software License Agreement** window, accept the terms in the License Agreement and click **Next**.
4. In the **Type of Install** window, select **Application Server** (default: Web/Application Server) and click **Next**.
5. The **Application Server** window opens.
6. By default, all the services listed under Windows Services and WCF Services are selected and installed. If you do not want to install any service, clear the check box for the service, otherwise, click **Next**.
The **Destination** window opens.
7. Use the default installation folder for installing TotalAgility, or click **Browse** to select a different folder, and click **Next**.
The **Credentials** window opens.
8. Enter the credentials (password and confirm password) for the user who will run TotalAgility.
When you enter the credentials of a non-admin account, changes need to be made to ensure the Streaming Service will run.
9. On the **Root Website to host TotalAgility Application** list, select the website to host the TotalAgility application. By default, the **Default Web Site** is selected.

Note The websites added in IIS Manager appear on this list. To add a website in IIS Manager, click Start > Run > IIS Manager > Sites > Add Web Site.

10. To support SSL, select the **Support SSL** check box.

Note The SSL option is only available if you have configured the https binding in IIS. See [Configure TotalAgility for HTTPS communication](#).

11. Click **Next**.
The **Databases** window opens.

12. Do one of the following:

| Option | Description |
|--|--|
| Use the default settings. | Keep the Install Databases check box selected and follow Step 13 . |
| A database with the same name already exists, and you want to overwrite the existing database. | <ol style="list-style-type: none"> a. Select the Overwrite databases if they exist? check box. b. Click Yes. c. Click Yes to confirm overwriting databases. |
| Point to an existing database on your local machine. | <ol style="list-style-type: none"> a. Clear the Install Databases and Overwrite databases if they exist? check boxes. b. Enter a name for each database and follow Step 13. |
| Point to existing databases on a different machine. | <ol style="list-style-type: none"> a. Select the Install Databases and Overwrite databases if they exist? check boxes b. For each database do the following: <ol style="list-style-type: none"> 1. Enter a database name. 2. Click ellipsis for Server; select the mode of database server. 3. In the Security group, either use Windows Authentication, or select the SQL Server authentication providing the user name and password, and then click OK. 4. If all the databases reside on the same server, select the Apply these settings to all other Databases check box. |

Note

- If Apppool is running under a System account, the System displays an error.
- You must have a trusted account to interact with databases. Provide the SQL credentials and click **OK**.
- If you clear the "Instal Databases" and "Overwrite Databases, if they exist?" options, then the DB Connection Results window does not appear.
- If you install TotalAgility without any databases, you can use the Configuration Utility to point to the databases when they are available at a later a stage. See the *Kofax TotalAgility Configuration Utility Guide*.

13. Click **Next**.

The **DB Connection Results** window opens and displays the results of connecting to databases.

Note The **DB Connection Results** window only opens if the "Install Databases" and "Overwrite databases if they exist?" options are selected in the previous step.

14. If you wish to make any changes, click **Back** and make your changes, otherwise, click **Next**.

The **Software Checks** window opens. The system displays a list of required software based on services and databases selection and whether the required software is installed.

15. Review the **Detected Software** list and proceed as follows:
 - If your system does not have all the required software, click **Cancel** to close the installer and install the software.
 - If your system has all the required software, click **Next**. The **Kofax TotalAgility Resource Credentials** window opens
16. Enter the credentials (**Username**, **Password** (minimum 6 alphanumeric characters) and **Confirm** password) for the user to be created on installation.
By default, the username field displays the name of the logged on user. You can specify a different user name, as required.
17. To automatically start the services, keep the **Automatically Start Services** check box selected, and click **Next**.
The **Installation Review** window opens and displays the settings.
18. Click **Next** to start installation.
The **Installation Progress** window opens. The setup installs the required files, databases, and other integrated products.
19. Click **Next**.
The **Licensing** window opens.
20. Do one of the following:

| Option | Description |
|--|--|
| Connect to the License Server | <ol style="list-style-type: none"> a. In the License Server field, enter the location of the License Server. <div style="border: 1px solid gray; background-color: #f0f0f0; padding: 5px; margin: 5px 0;"> Note To connect to a shared License Server, enter the name or the IP address of a shared License Server. </div> b. In the Port Number field, enter the port number on which the License Server listens. c. Click Next. The second Licensing window opens. Follow the next step. |
| Skip connecting to the License Server now but connect when launching TotalAgility. OR If you have selected to install databases manually (in Step 12). | <ol style="list-style-type: none"> a. Click Skip. b. Click Finish. |

21. Enter your TotalAgility **Serial Number** and **Product code**.
The Serial Number and Product code appear by default, if the License Server is a shared license server.
22. The ID of the selected License Server appears in the **Machine ID** field.

23. To activate the license, select the license activation method:

- **Automatic:** Use this option when internet connectivity is available. The license is activated online.
- **Manual:** Use this option when there is no internet connectivity, or if automatic activation is not successful from the installer or license utility for your Kofax product. The Activation Code box is displayed where you can specify the activation code.

a. To obtain the activation code:

1. Enter the following URL in your browser:

<http://activatelegacy.kofax.com/support/Activation/manual.aspx>

The Kofax Product License Activation page opens.

- 2.** Enter the **Serial Number** issued to you at the time of purchase. If you have a hardware key, the serial number (usually 7 characters) is printed on the key.
- 3.** Enter the email address where Kofax can send the information you need to activate the product license.
- 4.** Click **Next** to proceed with the activation process.

Note Ignore the **Version** selection field if you do not have Kofax Capture or Ascent Capture.

5. Copy and paste the **Activation Code** into the field on the **Licensing** window.

6. Click **Activate** to activate the license, or click **Skip**. If you skip activating the license, a warning informs that you need to activate the license later.

b. Once you get the activation code, copy the code.

c. Paste the code in the **Activation Code** field on the **Licensing** window.

d. Click **Activate** to activate the license, or click **Skip** to activate the license later. If you skip activating the license, the summary panel displays the warning that you need to activate the license later.

24. Click Finish.

Your installation is now complete.

After TotalAgility is installed, the installer prompts you to [install](#) the Kofax Transformation Server bundle.

Note

- If you want to install any further services, you should uninstall TotalAgility and reinstall by selecting the required services in the Application Server window.
- If any errors occur during installation, TotalAgility creates a log file called Kofax TotalAgility.txt at C:\Users\xxxx\AppData\Local\Temp (where xxxx is the currently logged on user). Check this log file for error details. The success or failure of installation is indicated in the event log.

After you install TotalAgility, further configure TotalAgility to:

- [Launch TotalAgility](#)
- [Integrate with SharePoint](#)
- [Integrate with Dynamics CRM](#)
- [Integrate with Dynamics AX](#)
- [Integrate with Microsoft Outlook](#)
- [Integrate with Micro Focus Content Manager](#)

Note To view the TotalAgility version you installed, login to TotalAgility Designer and navigate to System > System settings. The version information is available at the bottom right corner of the System settings page. The last three digits correspond to the build number.

See also:

- [Perform a standard installation](#)
- [Install Database Only](#)
- [Install Web and Application Server](#)
- [Install Web Server](#)
- [Install Real Time Transformation Server](#)

Install Web and Application Server

This installation type installs the Web and Application servers on a single machine.

1. Navigate to \\TotalAgility\TotalAgility Install on the installation media and run one of the following commands:
 - If UAC (User Account Control) is enabled, right-click Setup.exe and select **Run As Administrator**.
 - If UAC is not enabled, run **Setup.exe**.

The system starts the installation.

2. In the **Kofax TotalAgility Installation Program** window, click **Next** or press Enter to move to the next window.

Note To exit the setup, click **Cancel** or press Esc.

3. In the **Kofax Inc. Software License Agreement** window, accept the terms in the License Agreement and click **Next**.
4. In the **Type of install** window, select **Web/Application Server** (default) and click **Next**.
5. The **Application Server** window opens.
6. By default, all the Windows Services are selected and installed. The Windows services include: Core Worker, Reporting, License, Transformation, Import and Export. If you do not want to install any service, clear the check box for the service, otherwise, click **Next**.
The **Destination** window opens.
7. Use the default installation folder or click **Browse** to select your desired location where TotalAgility will be installed.
8. Click **Next**.
The **Credentials** window opens.
9. Enter the credentials (**Password** and **Confirm** password) for the user who will run TotalAgility.
10. On the **Root Website to host TotalAgility Application** list, select the website to host the TotalAgility application. By default, the **Default Web Site** is selected.

Note The websites added in IIS Manager appear on this list. To add a website in IIS Manager, click `Start > Run > Inetmgr > Sites > Add Web Site`.

11. To support SSL, select the **Support SSL** check box.

Note The SSL option is only available if you have configured the https binding in IIS. See [Configure TotalAgility for HTTPS communication](#).

12. Do either of the following for **Windows Authentication**:
 - To log on automatically to TotalAgility Designer and Workspace, keep the **Windows Authentication** check box selected (default).
 - To log on manually to TotalAgility Designer and Workspace, clear the **Windows Authentication** check box.
13. Click **Next**.
The **Databases** window opens.

14. Do one of the following:

| Option | Description |
|--|---|
| Use the default settings. | |
| A database with the same name already exists, and you want to overwrite the existing database. | <ol style="list-style-type: none"> Select the Overwrite databases if they exist? check box. Click Yes to confirm overwriting databases. |
| Point to existing database in your local machine. | <ol style="list-style-type: none"> Clear the Install Databases and Overwrite databases if they exist? check boxes. Enter a name for each database and follow Step 13. |
| Point to existing databases in a different machine. | <ol style="list-style-type: none"> clear the Install Databases and Overwrite databases if they exist? check boxes For each database do the following: <ol style="list-style-type: none"> Enter a name. Click ellipsis for Server; select the database server where the databases reside. In the Security group, either use Windows Authentication, or select the SQL Server authentication providing the user name and password, and then click OK. If all the databases reside on the same server, select the Apply these settings to all other Databases check box. |
| Manually install the databases. | <ol style="list-style-type: none"> Still run the setup.exe wizard to this screen. Clear the Install Databases and Overwrite databases if they exist? check boxes. Install the databases. After installing the databases, configure appropriate settings on this screen, and follow Step 13. |

Note

- If Apppool is running under a System account, the System displays an error.
- You must have a trusted account to interact with databases. Provide the SQL credentials and click **OK**.
- If you install TotalAgility without any databases, you can use the Configuration Utility to point to the databases when they are available at a later a stage. See the *Kofax TotalAgility Configuration Utility Guide*.

15. Click **Next**.

The **DB Connection Results** window opens and displays the results of connecting to the databases.

Note The **DB Connection Results** window only opens if the **Install Databases** and **Overwrite databases if they exist?** options are selected in the previous step.

16. If you wish to make any changes, click **Back** and make your changes, otherwise, click **Next**. The **Software Checks** window opens. The system displays a list of required software based on services and databases selection and whether the required software is installed.
17. Review the **Detected Software** list and proceed as follows:
 - If your system does not have all the required software, click **Cancel** to close the installer and install the software.
 - If your system has all the required software, click **Next**. The **TotalAgility Resource Credentials** window opens
18. Enter the credentials (**Username**, **Password** (minimum 6 alphanumeric characters) and **Confirm** password) for the user to be created on installation.
By default, the username field displays the name of the logged on user. You can specify a different user name, as required.
19. Click **Next**.
The **Install Options** window opens.
20. To automatically start the services, keep the **Automatically Start Services** check box selected and click **Next**.
The **Installation Review** window opens and displays the settings.
21. Review the settings and click **Next** to start the installation.
The **Installation Progress** window displays the progress of installation. The setup installs the required files, databases, and other integrated products.
The **Licensing** window opens.
22. Do one of the following:

| Option | Description |
|--|--|
| Connect to the License Server | <ol style="list-style-type: none"> a. In the License Server field, enter the location of the License Server. <div style="border: 1px solid gray; background-color: #f0f0f0; padding: 5px; margin: 5px 0;"> Note To connect to a shared License Server, enter the name or the IP address of a shared License Server. </div> b. In the Port Number field, enter the port number on which the License Server listens. c. Click Next. The second Licensing window opens. Follow the next step. |
| Skip connecting to the License Server now but connect when launching TotalAgility. OR If you have selected to install databases manually (in Step 13). | <ol style="list-style-type: none"> a. Click Skip. b. Click Finish. |

23. Click **Next**.
The **Installation Progress** window opens. The setup installs the required files, databases, and other integrated products.
24. Click **Next**.
The **Licensing** window opens.

25. To connect to the License Server:

a. In the **License Server** field, enter the location of the License Server.

Note To connect to a shared License Server, enter the name or the IP address of a shared License Server.

b. In the **Port Number** field, enter the port number on which the License Server listens.

c. Click **Next**. The second Licensing window opens.

Alternatively, click **Skip** and proceed to Step 24 in the following cases:

- If you want to skip connecting to the License Server now but connect when launching TotalAgility.
- If you had selected to install databases manually (in Step 12).

26. Enter your TotalAgility **Serial Number** and **Product Code**.

Note The **Serial Number** and **Product Code** appear by default if the License Server is a shared license server.

27. The ID of the selected License Server appears in the **Machine ID** field.

28. To activate the license, select the license activation method:

- **Automatic:** Use this option when internet connectivity is available. The license is activated online.
- **Manual:** Use this option when there is no internet connectivity, or if automatic activation is not successful from the installer or license utility for your Kofax product. The Activation Code box is displayed where you can specify the activation code.

a. To obtain the activation code:

1. Enter the following URL in your browser:

<http://activatelegacy.kofax.com/support/Activation/manual.aspx>

The Kofax Product License Activation page opens.

2. Enter the **Serial Number** issued to you at the time of purchase. If you have a hardware key, the serial number (usually 7 characters) is printed on the key.
3. Enter the email address where Kofax can send the information you need to activate the product license.
4. Click **Next** to proceed with the activation process.

Note Ignore the "Version" selection field if you do not have Kofax Capture or Ascent Capture.

5. Copy and paste the **Activation Code** into the field on the **Licensing** window.

6. Click **Activate** to activate the license, or click **Skip**. If you skip activating the license, a warning informs that you need to activate the license later.

b. Once you get the activation code, copy the code.

c. Paste the code in the **Activation Code** field on the **Licensing** window.

d. Click **Activate** to activate the license, or click **Skip** to activate the license later. If you skip activating the license, the summary panel displays the warning that you need to activate the license later.

Note The license period starts once the license is activated. So you can skip activation during installation and only activate it when you are ready to use TotalAgility. You are required to activate the license when you log in to TotalAgility for the first time.

29. Click Finish.

Your installation is now complete.

After TotalAgility is installed, the installer prompts you to [install](#) Transformation Server.

Note

- To install any further services, you must uninstall TotalAgility and reinstall by selecting the required services in the Application Server window.
- If any errors occur during the installation, TotalAgility creates a log file called Kofax TotalAgility.txt at C:\Users\xxxx\AppData\Local\Temp (where xxxx is the currently logged on user). Check this log file for error details. The success or failure of installation is indicated in the event log.

After you install TotalAgility, further configure TotalAgility to:

- [Launch TotalAgility](#).
- [Integrate with SharePoint](#).
- [Integrate with Dynamics CRM](#).
- [Integrate with Dynamics AX](#).
- [Integrate with Microsoft Outlook](#).
- [Integrate with Micro Focus Content Manager](#).

Note To view the TotalAgility version you installed, login to TotalAgility Designer and navigate to System > System settings. The version information is available at the bottom right corner of the System settings page. The last three digits correspond to the build number.

See also:

- [Perform a standard installation](#)
- [Install Database Only](#)
- [Install Application Server](#)
- [Install Web Server](#)
- [Install Real Time Transformation Server](#)

Install Real Time Transformation Server

1. Navigate to \\TotalAgility\TotalAgility Install on the installation media and run one of the following commands:
 - If UAC (User Account Control) is enabled, right-click Setup.exe and select **Run As Administrator**.
 - If UAC is not enabled, run **Setup.exe**.

The system starts the installation.

2. In the **Kofax TotalAgility Installation Program** window, click **Next** or press Enter to move to the next window.

Note To exit the setup, click **Cancel** or press Esc.

3. In the **Kofax Inc. Software License Agreement** window, accept the terms in the License Agreement and click **Next**.

4. In the **Type of Install** window, select **Real Time Transformation Service** and click **Next**. The **Destination** window opens.
5. Use the default installation folder or click **Browse** to select a different path and click **Next**. The **Credentials** window opens.
6. Enter the credentials (password and confirm password) for the user who will run TotalAgility.
7. On the **Root Website to host TotalAgility Application** list, select the website to host the TotalAgility application. By default, the **Default Web Site** is selected.

Note The websites added in IIS Manager appear on this list. To add a website in IIS Manager, click `Start > Run > Inetmgr > Sites > Add Web Site`.

8. To support SSL, select the **Support SSL** check box.

Note The SSL option is only available if you have configured the https binding in IIS. See [Configure TotalAgility for HTTPS communication](#).

9. Do either of the following in **Windows Authentication** option:
 - To log on automatically to TotalAgility Designer and Workspace, keep the **Windows Authentication** check box selected (default).
 - To log on manually to TotalAgility Designer and Workspace, clear the **Windows Authentication** check box.
10. Click **Next**. The **Databases** window opens.
11. Either use the default settings or do the following:
 - If you want to point to existing database in your local machine, enter a name for each database and enter the credentials (password and confirm password) for the user to be created on installation.
 - If you want to point to existing databases in a different machine, enter a name for each database; click ellipsis for **Server**; select the database server where the databases reside; in the **Security** group, either use **Windows Authentication**, or select the SQL Server authentication providing the user name and password, and then click **OK**. If all the databases reside on the same server, select the **Apply these settings to all other Databases** check box.
12. Click **Next**. The **Software Checks** window opens. The system displays a list of required software and whether the software is installed.
13. Review the **Detected Software** list and proceed as follows:
 - If your system does not have all the required software, click **Cancel** to close the installer and install the software.
 - If your system has all the required software, click **Next**. The **Installation Review** window opens.
14. Review the settings and click **Next**. The **Installation Progress** window opens. The setup installs the required files, databases, and other integrated products.

15. Click Finish.

Your installation is now complete.

Note If any errors occur during the installation, TotalAgility creates a log file called Kofax TotalAgility.txt on your desktop. Check this log file for error details. The success or failure of installation is indicated in the event log.

16. To ensure that the installation works as expected, perform the following steps.

- a. Navigate to and edit the web.config file that is located at `<%Program Files%>/Kofax/TotalAgility/Agility.Server.Web`.
- b. Locate the `TransformationServerExternalService_Binding` binding parameter and ensure that the `transport clientCredentialType` value is set to `Windows`.
- c. Save and close the web.config file.

Upgrade Transformation Designer Help

The Transformation Designer help is not automatically upgraded when you install Kofax TotalAgility 7.7.0. As a result, you need to follow these manual steps to upgrade the documentation.

1. Navigate to the location where the Transformation Designer documentation is installed. By default, this is `%ProgramData%/Kofax/Transformation`.
A directory called "Help" is displayed.
2. Rename the folder to "Help_7.7.0" or something similar.
Leave the window open as you will need it again later.
3. In the Kofax TotalAgility 7.7.0 ISO file, navigate to `Kofax TotalAgility\TotalAgility\Transformation Designer`.
A ZIP file called "Help.zip" is displayed.
4. Extract the "Help.zip" to `%ProgramData%/Kofax/Transformation` and ensure that the resulting directory is called "Help"
5. Open Transformation Designer and press F1 to open the help.
The upgraded help is displayed.
If the help does not display, ensure that the structure of the Help directory matches that of the "Help_7.7.0" directory and try again.

Perform TotalAgility installation in a Docker container

A Docker is an open platform for developing, shipping, and running applications. Docker enables you to separate an application from its infrastructure. Using Docker, you can manage your infrastructure in the same way you manage your applications.

Docker provides the ability to package and run an application such as TotalAgility in a loosely isolated environment called a Container. The isolation and security allows you to run many containers simultaneously on a given host using fewer resources than virtual machines.

You can deploy TotalAgility application into your production environment, as an independent container or an orchestrated set of containers. This works the same whether your production environment is a local datacenter, a cloud provider, or a hybrid of the two. You do not need to use the TotalAgility installation program when TotalAgility is deployed in a Docker container. Instead, TotalAgility is already installed and only the relevant configuration settings, such as database connection strings, are required when the container runs.

By default, all TotalAgility containers do not have limits for memory or CPU. SQL Server runs either on another Windows container or another machine, it does not run in the TotalAgility container.

See also:

- [Install Docker on Windows server](#)
- [Create a TotalAgility Docker container image](#)
- [Run a Docker container](#)

Install Docker on Windows server

Set up Docker on your Windows server.

1. Open an elevated PowerShell command prompt, and type the following commands:

```
Install-Module DockerMsftProvider -Force
Install-Package Docker -ProviderName DockerMsftProvider -Force
```

2. If a reboot is required, restart your instance using the following command:

```
(Install-WindowsFeature Containers).RestartNeeded
```

If the output of this command is Yes, restart the server using the following command: `Restart-Computer`.

3. Test your Docker Engine - Enterprise installation by running the "docker info" command.

```
docker info
Containers: 1
  Running: 0
  Paused: 0
  Stopped: 1
Images: 26
Server Version: 18.09.3
Storage Driver: windowsfilter
  Windows:
Execution Driver: <not supported>
Logging Driver: json-file
Plugins:
  Volume: local
  Network: ics l2bridge l2tunnel nat null overlay transparent
Kernel Version: 10.0 14393 (14393.2828.amd64fre.rs1_release_inmarket.190216-1457)
Operating System: Windows Server 2016 Standard Version 1607 (OS Build 14393.2828)
OSType: windows
Architecture: x86_64
CPUs: 4
Total Memory: 10.04 GiB
Name: HV-Docker-QA
ID: HI53:GJSY:3BWT:Z3S5:3NWU:DEFN:6D3X:KCXO:2EMJ:ITZR:QAVY:VXFK
Docker Root Dir: C:\ProgramData\docker
Debug Mode (client): false
Debug Mode (server): false
Registry: https://index.docker.io/v1/
Labels:
Insecure Registries:
  127.0.0.0/8
```

4. To make Docker work within the Transformation server space requirements, and to increase the default maximum size for the Docker container images, perform the following steps:
 - a. Open **daemon.json** available at "C:\ProgramData\docker\config". If the file does not exist at that location, create the file.
 - b. Append the following text to daemon.json:


```
{
"storage-opts": ["size=30GB"]
}
```
 - c. Restart the Docker Engine service.

Create a TotalAgility Docker container image

A container is defined by its image as well as any configuration options you provide when you create or start it.

To create a Docker image, you need Internet connectivity because Docker uses the Microsoft "microsoft/aspnet" image as a base onto which the prerequisites are installed (from the base OS or from the Internet when any feature is not available on the image).

1. Extract the contents of KofaxTotalAgility-7.7.0.ZIP to a <source directory>.
2. Create a <workingdirectory>.

Your docker commands will be run from this directory.
3. Copy the contents of <source directory>\TotalAgility\Utilities\Docker to <working directory>.
4. Move the <source directory> folder to <working directory>\ContainerFiles\TotalAgility.

The file structure should be as follows:

```
<working directory>\Dockerfile
<working directory>\ContainerFiles\TotalAgility
<working directory>\ContainerFiles\PowerShellScripts
```
5. Update the parameters as needed for each container type. See [Silent installation configuration](#).
6. To create the image, open a PowerShell window on the container host and run the following command:

```
docker build -t <imagenamegoeshere> "<fullpathtoworkingdirectory>"
```

Note Container host is the machine where Docker server is installed. Performance of a build command depends on the number of processors in the container host machine. The command may take approximately one hour to complete with a quad core processors configuration.

Example The following command generates the image with the name "kofaxop" using the contents inside C:\Docker\Kofax TotalAgility:

```
docker build -t kofaxop "C:\Docker\Kofax TotalAgility"
```

Silent installation configuration

1. On the installation media, navigate to `\\TotalAgility\TotalAgilityInstall` and open `SilentInstallConfig.xml` using a text editor.
2. The following are the available Docker container types for this deployment and the required configuration parameters to be updated in `SilentInstallConfig.xml`.
 - [Demo](#)
 - [Application Server \(Core Services and Core Worker\)](#)
 - [Web Server](#)
 - [Web Server and Application Server \(Core Services and Core Worker\)](#)
 - [Reporting Server](#)
 - [License Server](#)
 - [Transformation Server](#)
 - [Real Time Transformation Service](#)

Note You can create a Docker container with any combinations of App server, Web server, Reporting Server, Licensing Server and Transformation Server. Real Time Transformation Server (RTTS) is supported only in a dedicated Docker container.

Demo

Update the following parameters for a Demo server installation.

Note Fix the line breaks if you copy and paste the code from this guide.

| Parameter | Value | Description |
|-------------------------------|-------|--|
| ServicesInstallOptions | | |
| ImportService | true | |
| ExportService | false | The Export Service is not supported inside Docker containers. |
| LicenseService | true | |
| CoreWorkerService | true | |
| ReportingService | true | |
| TransformationService | true | |
| CoreServices | true | |
| DatabaseInformation | | |
| InstallDatabases | false | Skips installing databases as part of the Docker image installation. |
| Identity Information | | |
| RunAsSystemAccount | true | Allows the AppPool and Kofax TotalAgility services to be created with the LocalSystem account. |
| Install Info | | |

| Parameter | Value | Description |
|----------------------|-----------|---|
| InstallType | Both | |
| AuthenticationMode | Anonymous | Set the authentication mode to Windows or Anonymous. |
| StartServices | false | Services are started only after the container is running. |

Application Server (Core Services and Core Worker)

Update the following parameters for the Application server installation.

| Parameter | Value | Description |
|-------------------------------|-------------------|--|
| ServicesInstallOptions | | |
| ImportService | true | |
| ExportService | false | The Export Service is not supported inside Docker containers. |
| ReportingService | false | |
| LicenseService | false | |
| CoreWorkerService | true | |
| CoreService | true | |
| TransformationService | false | |
| DatabaseInformation | | |
| InstallDatabases | false | Skips installing databases as part of the Docker image installation. |
| Identity Information | | |
| RunAsSystemAccount | true | Allows the AppPool and Kofax TotalAgility services to be created with the LocalSystem account. |
| Install Info | | |
| InstallType | ApplicationServer | |
| AuthenticationMode | Anonymous | Set the authentication mode to Windows or Anonymous. |
| StartServices | false | Services are started only after the container is running. |

Web Server

Update the following parameters for the Web server installation.

| Parameter | Value | Description |
|-----------------------------|-------|--|
| DatabaseInformation | | |
| InstallDatabases | false | Skips installing databases as part of the Docker image installation. |
| Identity Information | | |
| RunAsSystemAccount | true | Allows the AppPool and Kofax TotalAgility services to be created with the LocalSystem account. |
| Install Info | | |

| Parameter | Value | Description |
|----------------------|-----------|---|
| InstallType | WebServer | |
| AuthenticationMode | Anonymous | Set the authentication mode to Windows or Anonymous. |
| StartServices | false | Services are started only after the container is running. |

Web Server and Application Server (Core Services and Core Worker)

Update the following parameters for both Web and Application server installation.

| Parameter | Value | Description |
|-------------------------------|-----------|--|
| ServicesInstallOptions | | |
| ImportService | true | |
| ExportService | false | The Export Service is not supported inside Docker containers. |
| ReportingService | false | |
| LicenseService | false | |
| CoreWorkerService | true | |
| CoreService | true | |
| TransformationService | false | |
| DatabaseInformation | | |
| InstallDatabases | false | Skips installing databases as part of the Docker image installation. |
| Identity Information | | |
| RunAsSystemAccount | true | Allows the AppPool and Kofax TotalAgility services to be created with the LocalSystem account. |
| Install Info | | |
| InstallType | Both | |
| AuthenticationMode | Anonymous | Set the authentication mode to Windows or Anonymous. |
| StartServices | false | Services are started only after the container is running. |

Reporting Server

Update the following parameters for the Reporting server installation.

| Parameter | Value | Description |
|-------------------------------|-------|---|
| ServicesInstallOptions | | |
| ImportService | false | |
| ExportService | false | The Export Service is not supported inside Docker containers. |
| ReportingService | true | |
| LicenseService | false | |
| CoreWorkerService | false | |

| Parameter | Value | Description |
|-----------------------------|-------------------|--|
| CoreService | false | |
| TransformationService | false | |
| DatabaseInformation | | |
| InstallDatabases | false | Skips installing databases as part of the Docker image installation. |
| Identity Information | | |
| RunAsSystemAccount | true | Allows the AppPool and Kofax TotalAgility services to be created with the LocalSystem account. |
| Install Info | | |
| Install Type | ApplicationServer | |
| AuthenticationMode | Anonymous | Set the authentication mode to Windows or Anonymous. |
| StartServices | false | Services are started only after the container is running. |

License Server

Update the following parameters for a License server installation.

| Parameter | Value | Description |
|-------------------------------|-------------------|--|
| ServicesInstallOptions | | |
| LicenseService | true | |
| CoreWorkerService | false | |
| ReportingService | false | |
| TransformationService | false | |
| CoreServices | false | |
| DatabaseInformation | | |
| InstallDatabases | false | Skips installing databases as part of the Docker image installation. |
| Identity Information | | |
| RunAsSystemAccount | true | Allows the AppPool and Kofax TotalAgility services to be created with the LocalSystem account. |
| Install Info | | |
| InstallType | ApplicationServer | |
| StartServices | false | Services are started only after the container is running. |

Note After configuring and starting the container, licensing is not activated. You must activate licensing through the TotalAgility Designer.

Transformation Server

Update the following parameters for the Transformation server installation.

| Parameter | Value | Description |
|-------------------------------|-------------------|--|
| ServicesInstallOptions | | |
| CoreWorkerService | false | |
| ImportService | false | |
| ExportService | false | The Export Service is not supported inside Docker containers. |
| ReportingService | false | |
| LicenseService | false | |
| TransformationService | true | |
| CoreServices | false | |
| DatabaseInformation | | |
| InstallDatabases | false | Skips installing databases as part of the Docker image installation. |
| Identity Information | | |
| RunAsSystemAccount | true | Allows the AppPool and Kofax TotalAgility services to be created with the LocalSystem account. |
| Install Info | | |
| InstallType | ApplicationServer | |
| AuthenticationMode | Anonymous | Set the authentication mode to Windows or Anonymous. |
| StartServices | false | Services are started only after the container is running. |

Real Time Transformation Service

Update the following parameters for the Real Time Transformation Service installation.

| Parameter | Value | Description |
|-------------------------------|-----------|--|
| ServicesInstallOptions | | |
| CoreServices | true | |
| DatabaseInformation | | |
| InstallDatabases | false | Skips installing databases as part of the Docker image installation. |
| Identity Information | | |
| RunAsSystemAccount | true | Allows the AppPool and Kofax TotalAgility services to be created with the LocalSystem account. |
| Install Info | | |
| InstallType | RTTS | |
| AuthenticationMode | Anonymous | Set the authentication mode to Windows or Anonymous. |
| StartServices | false | Services are started only after the container is running. |

Install legacy wrapper on a Docker container

You can install the legacy wrappers through PowerShell scripts on a Docker container.

1. On the installation media, navigate to `\\TotalAgility\Utilities\Docker\ContainerFiles\PowershellScripts\Startup.ps1`.
2. Open the `Startup.ps1` in a text editor.
3. Uncomment the following snippet in this script file to install the legacy wrappers.

```
#if (Test-Path -Path 'C:\Program Files\Kofax\TotalAgility\LegacyWrappers
\WrapperInstaller.exe')
#{
#   'C:\Program Files\Kofax\TotalAgility\LegacyWrappers\WrapperInstaller.exe'
#}
```

4. Save the changes.

Deploy Docker images in Azure Kubernetes containers

The existing format of environment variables containing "\" character used in `DockerSettings.env` is not accepted as a valid symbol for an environment variable name. As a result, existing Docker images cannot be deployed to Kubernetes.

To handle this, do the following before building a Docker image that needs to be deployed in Kubernetes:

1. Replace "\" with "--" for environment variables names in `DockerSettings.env`.

Example:

- Current format: `KTA_Agility.Server.Web\web.config_InstallDatabases=False`
- New format: `KTA_Agility.Server.Web--web.config_InstallDatabases=False`

2. Update the `UpdateConfigAppSettings.ps1` and `UpdateConfigBindings.ps1` Powershell script files by adding the following line after the line to construct configuration files's full path:

```
$currentFileName = $currentFileName -replace "--", "\"
```

3. Similarly update the `KCMPProxyInstallation.ps1` Powershell script file to handle this change by changing the first line as follows:

```
Get-ChildItem env:* | Where-Object {$_.key -eq "KTA_Agility.Server.Web--
web.config_CCMServerURL" }
```

Run a Docker container

A Docker container runs on any machine that supports the container's runtime environment. Applications are not required to be tied to the host operating system, so both the application environment and the underlying operating environment can be kept clean and minimal.

When a container stops running, changes to its state are not lost unless they are saved in persistent storage.

Before running a Docker container, the databases must already be set up (using [Database only installation mode](#)).

To use this setup, you need the following configuration on SQL Server:

- Firewall should allow remote access to SQL Server.

6. To open a port number required for Message Connector, you must add “-p 5003:25086” to the “docker run” command. For example:

```
docker run -d --hostname "opdemo2" --name "opdemo2" --env-file "C:\Docker\TotalAgility\dockersettings.env" -p 5000:80 -p 5003:25086 kofaxop
```

Note 5003 is an example forwarded port number for Message Connector. Use the port number that you have configured for Message Connector. Similarly, you can configure port numbers for other instances of Message Connector.

If running TotalAgility containers on multiple hosts, it is recommended to use Docker Swarm or Kubernetes orchestrators that have a built-in DNS server to resolve container DNSs across multiple hosts.

If not using a container orchestrator and using Transformation Server synchronous processing, the TRANS_SERVER_INSTANCE database table should be manually updated to contain the IP URL of the host running the Transformation Server container. Transformation Server service runs on port 9001 by default; however, the port can be reconfigured using the Configuration utility. This port needs to be exposed in order to be used by App container hosted on the different host machine. Use additional switch `-p TS Port :9001` while running a Transformation Server container.

Access TotalAgility

After you connect to the Docker container and verify that all services are in their expected state, use the following URLs to access TotalAgility outside the container host with the port forwarded setup:

- `http://<ipaddressofthecontainerhost>:<exposedportofthecontainerhost>/TotalAgility/Designer`
- `http://<ipaddressofthecontainerhost>:<exposedportofthecontainerhost>/TotalAgility/Forms`

For containers hosting IIS – TotalAgility website

Due to different default behavior with case-insensitive URL resolution within Docker containers, it is necessary to perform extra configuration to ensure the TotalAgility website can be resolved in a case insensitive way.

When you configure the container for the Designer / Workspace, we recommend that you use a VirtualHost file to configure the port and URI exposure through the host OS before you access the URL. You may also consider using a rewrite rule to ensure that any URL access is redirected to a lowercase representation.

As per RFC 2616, "...a client SHOULD use a case-sensitive octet-by-octet comparison of the entire URIs...Comparisons of host names MUST be case-insensitive."

The Docker daemon and cache hold case-sensitive resolutions of the URL, which can cause issues if the case of the URL is changed prior to first access. This caching issue occurs as a result of Docker's use of WSL v1 and should be resolved in WSL v2. Within Docker you cannot expose the same container port for multiple protocols, and having previously cached a case-sensitive URL, the cache must be cleared to replace with the lowercase URL.

Access Message Connector

To access the Message Connector within the container host or from outside the host, perform the following steps.

1. Use the following URL: `http:DockeServerIP:5003/en/file/index.html`
Where `DockeServerIP` is the IP of the Docker Container host and `5003` is the configured forwarded port number to access the Message Connector. Use the forwarded port number you have configured for Message Connector.
The Message Connector Monitor appears.
2. To access Message Connector configuration, click the **Configuration Tool**.
The Message Connector Configuration tool appears.
3. Make the necessary configuration changes and save.
4. Optionally, to restart the Message Connector service, click the **Restart service** button.
To stop and restart Message Connector service from the Docker container, use the following commands: `Start-service KIC-ED-MC`
`Stop-service KIC-ED-MC`

Additional information

This table includes some useful Docker commands.

| Docker command | Purpose |
|--|--|
| <code>docker images</code> | Gets the list of all Docker images currently available on the server. |
| <code>docker ps -a</code> | Gets a list of all containers available on the server. |
| <code>docker start <containerID></code> | Starts the container with the ID <code><containerID></code> on the server. |
| <code>docker stop <containerID></code> | Stops the container with the ID <code><containerID></code> on the server. |
| <code>docker rm <containerID></code> | Deletes the container with the ID <code><containerID></code> on the server. |
| <code>docker rmi <imagename></code> | Deletes the image with the ID <code><imagename></code> on the server. Deletion is successful only if no child containers use this image. |
| <code>docker inspect -f "{{ .NetworkSettings.Networks.nat.IPAddress }}" <containerID></code> | Gets the IP address of the container with the ID <code><containerID></code> . |
| <code>docker cp "<containerID>:/<fullfilepathoncontainer>" "<pathtofolderonserver>"</code> | Copies a file from the container to the server. |
| <code>docker cp "<fullfilepathonserver>" "<containerID>:/<fullfilepathoncontainer>"</code> | Copies a file from server to the container. |
| <code>docker logs <containerID></code> | Displays all logs for a particular container. |
| <code>docker logs - tail n <containerID></code> | Displays the last "n" logs for a particular container. |
| <code>type <FQDN of text file></code> | Displays the content of text file within a powershell instance. |
| <code>Get-Process</code> | Gets the list of all processes. |
| <code>Get-Service</code> | Gets the list of all services (running and stopped). |
| <code>start-service ServiceNameGoesHere</code> | Starts a particular service. |
| <code>Stop-service ServiceNameGoesHere</code> | Stops a particular service. |

| Docker command | Purpose |
|---|---|
| Get-WMIObject Win32_Service select startname, name, status | Gets a list of all services with some additional columns. |
| Get-EventLog -LogName Application -newest 10 format-table -auto -wrap | Gets the last 10 application logs from the event viewer. |
| import-module webadministration | Runs before the following commands. |
| get-iisapppool | Gets the name of the Application pool. |
| get-itemProperty -path IIS:\APPPOLS\TotalAgilityAppPool -names | Gets the identity information for the Application pool. |

Import SSL certificate on the container

You can import a custom SSL certificate for use by TotalAgility on a Docker container.

You can import password-protected certificates with a private key. See [SSL Support Desk](#) for more information on certificate export.

1. Create a new folder, such as "HostMachineFolder" on the host machine.
2. Copy the certificate file, such as CertificateName.pfx to the newly created folder (HostMachineFolder).
3. You can pass the certificate password to the container as text or in a file. The file can be passed to the container as a secret (if using Docker compose, Kubernetes, and so on) or as a mapped volume. To pass password file using mapped volume, do the following:
 - a. Create new text file, such as password.txt in the HostMachineFolder.
 - b. Open the newly created file and enter the certificate's password in the first line of the file.
 - c. Save the file and ensure to that you change the file attribute to hidden.
4. Create a Docker container using the "docker run" command as documented in previous sections with two additional switches, "-v" and "-e".
 - a. -v: Container can access contents of HostMachineFolder via mapped ContainerFolder.
 - b. -e: additional environment variables are created to store SSL certificate path "KTA_SSL_CERT_PATH" and password ("KTA_SSL_CERT_PASSWORD" or password "KTA_SSL_CERT_PASSWORD_PATH").
 - c. Following are the examples of the "docker run" command with new -v and -e:
For on-premise:
 - `docker run --env-file "C:\Docker\TotalAgility\dockersettings.env" -e SSL_CERT_PASSWORD="password" -e SSL_CERT_PATH="HostMachineFolder\CertificateName.pfx" -v "HostMachineFolder:ContainerFolder" -p 5000:443 -d kofax/kta_771`
 - `docker run --env-file "C:\Docker\TotalAgility\dockersettings.env" -e KTA_SSL_CERT_PASSWORD_PATH="C:\folder\password.txt" -e`

```
KTA_SSL_CERT_PATH="C:\folder\Cert.pfx" -v "C:\folder:C:\folder2" -p  
5000:443 -d kofax/kta_771
```

For on-premise multi-tenancy:

- `docker run --env-file "C:\Docker\TotalAgility\dockersettings.env" -e SSL_CERT_PASSWORD="password" -e SSL_CERT_PATH="HostMachineFolder\CertificateName.pfx" -v "HostMachineFolder:ContainerFolder" -p 5000:443 -d kofax/kta_771`
 - `docker run --env-file "C:\Docker\TotalAgility\dockersettings.env" -e KTA_SSL_CERT_PASSWORD_PATH="C:\folder\password.txt" -e KTA_SSL_CERT_PATH="C:\folder\Cert.pfx" -v "C:\folder:C:\folder2" -p 5000:443 -d kofax/kta_771`
- d. Replace HostMachineFolder with the actual certificate path on the host machine.
 - e. Replace the CertificateName with the actual certificate name.
 - f. Replace the ContainerFolder with the actual folderpath and name on the container (folder will be created).

Note Ensure that folder paths or names do not have spaces.

Use Windows authentication with IIS and SQL server

Use GSMA to configure Windows authentication for Docker containers.

Install TotalAgility on a non-standard port

To install TotalAgility on a non-standard port, you must first edit bindings to specify the port number, update the base address, and restart the streaming service.

Edit bindings

1. Click `Start > Run > InetMgr > Sites > Default Web Site`.
By default, the **Default Web Site** is selected.
2. Right click **Default Web Site** and click **Edit Bindings**.
3. Select the default port 80 and click **Edit**.
4. In the Edit Site Binding window, change the port number to 81 and click **OK**.
5. Install Kofax TotalAgility. See [TotalAgility installation](#).
6. Enter the following URL in your browser and change the port number to 81 in the URL to logon.
`http://ServerName:81/TotalAgility/forms/GeneralWorkQueue.form`

Update the base address

You can edit the base address setting either manually or using the Configuration Utility.

Manually

1. On the installation media, open the Agility.Server.StreamingService.exe.config file available at `\TotalAgility\Agility.Server.Web\bin>` and change the base address section.

```
< baseAddresses >
<add baseAddress="http://<ServerName>.<DomainName>:
<non default port>/TotalAgility/Services/Sdk/StreamingService.svc" />
</ baseAddresses >
```

2. Similarly, change the base address section in the Agility.Server.StreamingService.exe.config file available at `\TotalAgility\CoreWorkerService>`.

```
< baseAddresses >
<add baseAddress="http://<ServerName>.<DomainName>:
<non default port>/TotalAgility/Services/Core/StreamingService.svc" />
</ baseAddresses >
```

3. The streaming service hosts an http server. If the Streaming service and Package streaming service are running under a non-admin account on a non-standard port, you need to reserve a namespace for them. To do so, on the Command Prompt, run the following command using an account that has administrator rights on the local machine:

- For StreamingService.svc:

```
netsh http add urlacl url=http://+:<non default port>/TotalAgility/
Services/Sdk/StreamingService.svc user=%domainuser%
```

- For PackageStreamingService.svc:

```
netsh http add urlacl url=http://+:<non default port>/TotalAgility/
Services/Sdk/PackageStreamingService.svc user=%domainuser%
```

If both of these URLs are not reserved then the Streaming service will not start when using a non-admin service account.

Using the Configuration Utility

Run the Configuration utility and update the base address property for the streaming service. The streaming service must be restarted for the change to take effect.

Restart the Streaming Service

Once the base address is changed or the command to reserve the namespace is completed, restart the Streaming service.

Install databases manually

The following procedure describes installing databases manually.

Note the following:

- You can either create a single database for Main, Audit and Finished databases or create separate Main, Audit and Finished databases.

- Simulator must have its own database because it has the same table names as the Main database.
- By default, the Document Repository is installed into its own database. However, you can create tables for the document repository within the main TotalAgility database by [running the scripts](#).
- If the Application Server and databases are installed on the same server, it is not required to start MSDTC. When you have scaled out (separate) TotalAgility databases such as Main and Archive, you require the Microsoft Distributed Transaction Coordinator (MSDTC). By default, the security configuration for the Microsoft Distributed Transaction Coordinator is set to not allow network transactions. As the MSDTC is responsible for coordinating transactions that span multiple resource managers, such as databases, message queues, and file systems you must configure MSDTC if your databases are split and the TotalAgility application reside on separate servers. In this case, do the following to select the settings:
 1. Navigate to **Control Panel > System and Security > Administrative Tools**.
 2. Click **Component Services**.
The Component Services window appears.
 3. In the left panel, under **Console Root** expand the Component Services, navigate to **Computers > My Computer > Distributed Transaction Coordinator** and select **Local DTC**.
 4. From the Local DTC context menu, select **Properties**.
 5. In the Local DTC Properties window, click the **Security** tab.
 6. Under Security Settings, select the checkboxes for **Network DTC Access** and **Enable SNA LU 6.2 Transactions** (if JDBC is used).
 7. Select **Enable SNA LU 6.2 Transactions** if required. Ensure that Microsoft SNA server is installed and SNA resources are correctly configured.
 8. Under Transaction Manager Communication, select the checkboxes for **Allow Inbound** and **Allow Outbound** (configure the desired level of security for authentication).
- After the settings are completed, start the Distributed Transaction Coordinator service. To start MSDTC manually, on the Command Prompt window, run the following command: `net start msdtc`. Alternatively, at Run, type Services.msc and press **Enter**. Right-click the Distributed Transaction Coordinator service and click **Start**.

Note The remote SQL server will also require MSDTC configuration. In addition to the above Security Settings, select **Allow Remote Clients**. The Allow Remote Administration setting is optional.

If there are additional network and security rules required for TotalAgility to communicate, there are a number of Microsoft tools that can help you troubleshoot some common issues. These tools are not Kofax products and carry no warranty or liability.

- **DTCTester**: This tool verifies the transactions between two computers if SQL Server is installed on one computer, using ODBC to verify transaction support against an SQL Server database.
- **DTCPing**: This tool verifies transaction support between two computers if SQL Server is not installed on either computer. The DTCPing tool must be run on both the client and server computers.
- TotalAgility license tables are installed by [running the Create_KLS_OnPremise.sql](#).

Do the following to install databases manually:

1. Ensure that you create the following databases:
 - TotalAgility
 - Finished Jobs
 - Audit
 - TotalAgility_Reporting
 - TotalAgility_Reporting_Staging
 - TotalAgility_Simulator
2. Edit the Initialise_Main.sql script by using the comments in the script. For example, update the details of the user who will log on to TotalAgility initially by editing the following:
 - a. @NTNAME = 'INSTALL_NTUSERID', where the User Domain and User ID replaces INSTALL_NTUSERID. For example, 'DomainName\USERA'
 - b. @FULLNAME = 'INSTALL_FULLNAME', where the User name replaces INSTALL_FULLNAME. For example, 'USER A'

3. Run the scripts in the following order across databases and follow the instructions inside each script.

a. Main(Create, Initialise)

Run the following scripts on the Main database:

- Create_Main.sql
- Initialise_Main.sql
- Create_Forms.sql
- Initialise_Forms.sql
- Create_KFS.sql
- Initialise_KFS.sql
- LicenseScripts\Create_KLS_OnPremise.sql

b. Finished Jobs(Create)

Run the following script on the Finished Jobs database (can exist on the Main database):

- Create_Archive.sql

c. Audit(Create, Intialise)

Run the following scripts on the Audit database (can exist on the Main database):

- Create_Audit.sql
- Initialise_Audit.sql

d. Simulator(Create)

Run the following script on the Simulator database:

- Create_Simulator.sql

e. Data Layer Database(Create)

The Repository2012_Create.sql script creates the documents database.

1. Run Repository2012_Create.sql script on the DataLayer database depending on the version of SQL Server. For example, run Repository2012_Create.sql.
2. In the SQL Management Studio, select Main menu>Query> SQLCMD mode.
3. Assign the database create permission if installing on a separate computer.

```
USE <TotalAgility_Documents>;  
GRANT CREATE DATABASE TO <Domain\resource name>  
GO
```

4. Update the "**DatabaseName**" and "**DefaultFilePrefix**" parameters in the script to the name of your database. For example,

```
:setvar DatabaseName "TotalAgility_Documents"  
:setvar DefaultFilePrefix "TotalAgility_Documents"
```

4. The following scripts are used for installing reporting databases manually.
 - Scripts for creating the Staging database.
 - Kofax.Reporting.Analytics.Staging.SQL_ TablesCreate.sql
 - Kofax.Reporting.Analytics.Staging.SQL_ Initialize.sql
 - Scripts for creating the Reporting database.
 - Kofax.Reporting.Analytics.SQL_ TablesCreate.sql
 - Kofax.Reporting.Analytics.SQL_ Initialize.sql

Note Before running these scripts, verify that a compatible database server is already installed. The Reporting tables must be in the default schema.

5. In the Installation wizard, in the Databases window, do the following:
 - a. Clear the check boxes for "Install Databases" and "Overwrite databases if they exist check".
 - b. Rename the databases under Database Name to match with the name given while creating databases manually.
Change the name of the Data Layer database to either Repository2012 or the name given while creating the databases.
 - c. Click **Next**. Ensure the installation completes before updating the configuration files.
6. You can edit the value of the database connections in the Web.config manually or run the Configuration Utility available on the installation media.
 - Open **Web.config** available at `\\TotalAgility\Agility.Server.Web`. In the **appSettings** section, update the value of the following database connections:
 - MainDBConnectionString
 - ArchiveDBConnectionString
 - AuditDBConnectionString
 - SimulatorDBConnectionString
 - ReportingMainDBConnectionString
 - ReportingStagingDBConnectionString

Note The database should point to the machine where Kofax TotalAgility is installed.

- Run the Configuration Utility and modify the values of the preceding database connections available on the Common settings tab.

7. To modify the value of database connections in Agility.Server.Core.WorkerService.exe.config, do either of the following:

- Open **Agility.Server.Core.WorkerService.exe.config** available at \\TotalAgility\CoreWorkerService and modify the values of following connection strings:
 - MainDBConnectionString
 - ArchiveDBConnectionString
 - AuditDBConnectionString
 - SimulatorDBConnectionString
 - ReportingMainDBConnectionString
 - ReportingStagingDBConnectionString

Note The database should point to the machine where the Kofax TotalAgility is installed.

- Run the Configuration Utility and modify the values of the preceding connection strings available on the Common settings tab.

8. To modify the values of database connections in the Agility.Server.StreamingService.exe.config, do either of the following:

- Open **Agility.Server.StreamingService.exe.config** available at \\TotalAgility\CoreWorkerService and update the following connection strings:
 - MainDBConnectionString
 - ArchiveDBConnectionString
 - AuditDBConnectionString
 - SimulatorDBConnectionString
 - ReportingMainDBConnectionString
 - ReportingStagingDBConnectionString

Note The database should point to the machine where Kofax TotalAgility is installed.

- Run the Configuration Utility and modify the values of the preceding connection strings available on the Common settings tab.

9. To connect TotalAgility to the desired documents database:

- a. Go to the TotalAgility Main database > SERVER_DATA table > CEBPM_SETTINGS column.
- b. Open the CEBPM_SETTINGS XML file.
- c. In the <Common Settings> section, update the Data Source value to your computer name, Integrated Security to True, and the value of the Initial Catalog to the Data Layer Database name.

```
<Common_Settings>
  <ReportingSettings />
  <DataLayerConfiguration RepositoryDBConnectionString=" ; Data Source=<computer
name>; Initial Catalog=Data Layer Database; User ID=; Password=; Integrated
Security=True; Connect Timeout=30; Encrypt=False; TrustServerCertificate=False"
RepositoryBlobStorageAccountConnectionString="{DATA_LAYER_BLOB_CONNSTRING}"
RepositoryBlobStorageContainerName="{DATA_LAYER_BLOB_CONTAINER}" />
</Common_Settings>
```

10. Restart the TotalAgility CoreWorker service for the change to take affect.

11. Generate the security key from System>System Settings>System>General in TotalAgility Designer.

Import Artifacts

You must import the standard forms, style sheets and custom assets after installing TotalAgility databases.

Note After upgrading TotalAgility, you must manually import the System maps and standard forms.

You can import all the artifact from WorkspacePackage.zip available at the following location:

```
\\TotalAgility\Agility.Server.Web\Packages
```

Configure TotalAgility for high availability

You can install a second License Server on a different computer and use it as a backup server for Kofax TotalAgility.

1. On the installation media, navigate to **\\TotalAgility > Licensing**.
2. Click **KSALicServerSetup**.
The License Server Setup window opens.
3. Click **Next**.
4. In the **Destination Folder** window, select the default folder (C:\Program Files (x86)\Kofax \License Server\) for the License Server or click **Change** to select a different folder.
5. Click **Next** and follow the instructions to complete the installation.

Access TotalAgility through iPad or iPhone

To access TotalAgility through iPad or iPhone, update the **Web.config** file. You can use Windows authentication between the Web and Application servers and still use TotalAgility authentication from the client device to the Web server.

1. Access TotalAgility **Web.config** file from the following directory on the Web server: C:\Program Files\Kofax\TotalAgility\Agility.Server.Web\Web.config.
2. Search the **.config** file for the following: `<binding name="BasicHttpBinding_Service">`.
3. Copy the entire block of code, from `<binding>` to `</binding>`.
4. Paste the block under the copied block and rename it to: `<binding name="BasicHttpBindingCore_Service">`.
5. In the copied binding, ensure HTTP with Windows authentication is enabled. This enables the authentication from the Web server to the Application server.
6. Navigate to the start of the core end points, search for: `<!--START CORE END POINTS -->`.
7. For each core end point replace `BasicHttpBinding_Service` with `BasicHttpBindingCore_Service`.
8. To use the authentication from the client device to the web server, update the original `BasicHttpBinding_Service` binding to use Anonymous authentication and SSL (if required).
9. Save the **Web.config** file.

10. Log on to TotalAgility ensuring you have been previously added as a TotalAgility user.

Federated Security-Generate a common machine key

When using Federated Security with TotalAgility in a load balance environment, TotalAgility cannot consistently decrypt the encrypted token passed from an Identity Provider using WSFed tokens. This is because, by default, each load balanced server has a unique machine key identifier used for token encryption/decryption.

We recommend that you generate a common machine key and propagate it to all servers in the load balanced environment. For example, if you generate a machine key for the TotalAgility application, the Web.config file gets automatically updated with the machine key element. The configuration of a machine key can be done at Web Server, Site or Application level.

To generate a machine key, perform the following steps:

1. Open **Internet Information Services**(IIS) manager.
2. Select the TotalAgility application, website or web server from the left panel to generate a machine key.
3. In **Features View**, right-click **Machine Key**, and then click **Open Feature**.
4. On the **Machine Key** page, select an encryption method from the **Encryption method** drop-down list.
5. Select a decryption method from the **Decryption method** drop-down list.
6. Optionally, configure settings for **Validation** and **Decryption** keys.
7. In the **Actions** panel, click **Generate Keys**, and then click **Apply**.
When you click apply, the changes are automatically saved in the Web.config file.

To encrypt and decrypt the machine key, see [Encrypt and decrypt the TotalAgility configuration files](#).

Encrypt and decrypt the configuration files

The TotalAgility configuration files include the DB Connection settings, including sensitive information. Therefore, we recommend that you encrypt the following TotalAgility files.

- Web.config (Use Microsoft ASP.NET IIS Registration Tool)
- Configuration files of executables (Use the Kofax.CEBPM.EncryptConfig.exe utility)

Note Kofax.CEBPM.EncryptConfig.exe cannot work with Web.config; it can only work with configurations of executables.

Encrypt and decrypt Web.config

1. Navigate to TotalAgility Web.config file located at `<Kofax Install location>\TotalAgility\Agility.Server.Web`.

- Use the Microsoft ASP.NET IIS Registration Tool (aspnet_regiis) to encrypt or decrypt any section of the Web.config file. See the Encrypting and Decrypting Configuration sections On the Microsoft website.

At a minimum, encrypt the appSettings section that includes the Database connection information.

Encrypt and decrypt the configuration files of executables

The configuration files of executables that can be encrypted include:

| Configuration file name | Location |
|---|--|
| <ul style="list-style-type: none"> Agility.Server.ExportConnector.exe.config Agility.Server.StreamingService.exe.config | Agility.Server.Web files: <Kofax Install location>\TotalAgility\Agility.Server.Web |
| <ul style="list-style-type: none"> Agility.Server.Core.WorkerService.exe.config Agility.Server.Core.Executor.exe.config Agility.Server.Core.ExportService.exe.config Agility.Server.Core.ExportWorker.Host.exe.config | Core Worker Service files: <Kofax Install location>\TotalAgility\CoreWorkerService |
| <ul style="list-style-type: none"> Kofax.CEBPM.Reporting.TAService.exe.config | Reporting Server Service file: <Kofax Install location>\TotalAgility\Reporting |
| <ul style="list-style-type: none"> Kofax.CEBPM.CPUserver.ServiceHost.exe.config | Transformation Server Service file: <Kofax Install location>\TotalAgility\Transformation Server |
| <ul style="list-style-type: none"> KSALicenseService.exe.config | License Server Service file: <Kofax Install location>\TotalAgility\LicenseServer |

Add the security provider

Add the following security provider in the configuration file before encrypting them:

```
<configProtectedData>
  <providers>
    <add useMachineProtection="true"
      name="DPAPIProtection"
      type="System.Configuration.DpapiProtectedConfigurationProvider,
      System.Configuration, Version=2.0.0.0, Culture=neutral,
      PublicKeyToken=b03f5f7f11d50a3a" />
    <add name="RSAProvider"
      type="System.Configuration.RsaProtectedConfigurationProvider,
      System.Configuration,
      Version=2.0.0.0, Culture=neutral, PublicKeyToken=b03f5f7f11d50a3a,
      processorArchitecture=MSIL"
      keyContainerName="CPUserverKeys" useMachineContainer="true" />
  </providers>
</configProtectedData>
```

Use the Kofax.CEBPM.Encryption.exe utility

Use the Kofax.CEBPM.EncryptConfig.exe utility (located in the TotalAgility installation_folder) to encrypt(-enc) or decrypt (-dec) any sections of the configuration files of executables.

At a minimum, encrypt the `AppSettings` section of each configuration file that includes the user ID and password and other sensitive information. Use the optional `-h` flag to display help for the command.

The TotalAgility Server supports two encryption methods depending on command line parameters using the `Kofax.CEBPM.EncryptConfig.exe` utility:

- [DPAPI encryption](#)
- [RSA encryption](#)

DPAPI encryption method

Because you must decrypt the file on the same machine where it was encrypted, use this utility to encrypt one server at a time.

Run the utility on each TotalAgility Server individually.

1. Stop the TotalAgility Core Worker Server service.
2. Navigate to the TotalAgility Core Worker installation directory.
3. Copy the **Kofax.CEBPM.EncryptConfig.exe** to the same folder where **Agility.Server.Core.WorkerService.exe.config** resides.
4. Open a Command Prompt window and run the following command:
Kofax.CEBPM.EncryptConfig.exe -f Agility.Server.Core.WorkerService.exe.config -s "appSettings" -p DPAPIProtection -enc

RSA encryption method

An algorithm for public key encryption and digital signatures that uses two separate keys. Create a key and encrypt the configuration file on one Server, and export the key to all the other Servers. All the TotalAgility Servers with the exported key installed can access the configuration file. Use this method if you have several Servers with the same configuration.

The following instructions differentiate between the source TotalAgility Server where you create the key and the target TotalAgility Servers onto which you import the key.

Prepare the key

Perform these steps on one source TotalAgility Server.

1. Create the custom RSA key container:
 - a. Log on to the TotalAgility Server with administrator rights.
 - b. Open a command-line window.
 - c. Navigate to the .NET Framework version 4.0 directory. For example, enter the following command:
cd \WINDOWS\Microsoft.Net\Framework\v4.0.*
 - d. Run the following command:
aspnet_regiis -pc "<KeysFile>" -exp
where:
 - `<KeysFile>` is the name of the key file.
 - The `-exp` option makes the key exportable.

2. Run the following command to grant the TotalAgility Core Worker Server service user permission to read the <KeysFile> RSA container file.

```
aspnet_regiis -pa "<KeysFile>" "<TotalAgilityserviceuser>"
```

where:

- <KeysFile> is the name of the key file you created in Step 1d.
- <TAserviceuser> is the TotalAgility Core Worker Server service user.

3. Encrypt the file:

- a. Log on to the TotalAgility Server as the Kofax TotalAgility Core Worker Server service user.
- b. Navigate to the installation directory for the TotalAgility Server and open a command-line window.
- c. Run the following command:

```
Kofax.CEBPM.EncryptConfig.exe -f  
Agility.Server.Core.WorkerService.exe.config -s "appSettings" -p  
RSAProvider -enc
```

This command encrypts the appSettings section of the configuration file. The appSettings section includes the user ID, password and other information.

4. Export the key by running the following command:

```
aspnet_regiis -px "<KeysFile>" "c:\keys.xml" -pri
```

where:

- <KeysFile> is the default keystore keyContainerName.
- <c:\keys.xml> is the path and file name of the exported key file.

Import the key

Perform these steps on every target TotalAgility Server.

1. Import the key:

- a. Log on to the TotalAgility Server with administrator rights.
- b. Copy the keys.xml file from the source TotalAgility Server to the root C:\ directory of the target TotalAgility Server.
- c. Open a command-line window.

- d. Run the following command:

```
aspnet_regiis -pi "<KeysFile>" "c:\keys.xml"
```

where:

- <KeysFile> is the default name of the key file.
 - <c:\keys.xml> is the path and file name to the imported key file.
- e. Delete the keys.xml because it contains the unprotected private key.

2. Run the following command to grant the TotalAgility Core Worker Server service user permissions to use the <KeysFile> RSA container file:

```
aspnet_regiis -pa "<KeysFile>" "TotalAgilityserviceuser"
```

where:

- <KeysFile> is the name of the key file you imported in step 1.
- <TotalAgilityserviceuser> is the TotalAgility Core Worker Server service user.

3. Repeat these steps on all remaining TotalAgility Servers.

Decrypt the configuration file

1. Stop the **TotalAgility Core Worker Server** service.
2. Navigate to the TotalAgility Server installation directory and open a command-line window.
3. Run the following command:

```
Kofax.CEBPM.EncryptConfig.exe -f
Agility.Server.Core.WorkerService.exe.config -s "appSettings" -p
DPAPIProtection -dec
```

Important Repeat the encrypt and decrypt procedures for other configuration files also.

Encrypt the configuration files in a docker container

To encrypt the Web.config files and all executable configuration files using "DPAPI", you must add the following to your docker run command.

```
-e KTA_CONFIG_ENCRYPTION_PROVIDER_TYPE="DPAPI"
```

For example, "docker run -d --hostname "opdemo2" --name "opdemo2" --env-file "C: \\\u0026gt; Docker\\TotalAgility\\dockersettings.env" -p 5000:80 -e KTA_CONFIG_ENCRYPTION_PROVIDER_TYPE="DPAPI" kofaxop"

To encrypt the Web.config files and all executable configuration files using "RSA", you must add the following to your docker run command.

```
-e KTA_CONFIG_ENCRYPTION_PROVIDER_TYPE="RSA"
```

For example, "docker run -d --hostname "opdemo2" --name "opdemo2" --env-file "C: \\\u0026gt; Docker\\TotalAgility\\dockersettings.env" -p 5000:80 -e KTA_CONFIG_ENCRYPTION_PROVIDER_TYPE="RSA" kofaxop"

Edit the TotalAgility configuration settings

After installing TotalAgility, to change or update any parameters, edit the following configuration files available in the installation directory:

- Agility.Server.Core.WorkerService.exe.config
- Agility.Server.Core.ExportService.exe.config
- Web.config
- KSALicenseService.exe

You can either edit each of these files separately or run the TotalAgility configuration utility to modify all the settings at one go. The configuration utility is available on the installation media and must be manually copied to your Kofax TotalAgility server. See the *Kofax TotalAgility Configuration Utility Guide*.

Update the parameter values

When you initially install the TotalAgility Server, the system stores the configuration settings in a .NET file, `Agility.Server.Core.WorkerService.exe.config`. To change the value of any parameters, do the following.

1. If you encrypted the configuration file after you installed the TotalAgility server, decrypt the file. See [Decrypting the configuration file](#).

Note If you use RSA encryption, decrypt the configuration file only on the source TotalAgility server where you initially encrypted the file.

2. Navigate to the installation directory for the TotalAgility server.
3. Open `Agility.Server.Core.WorkerService.exe.config` in a text editor.
4. Locate the following section:

```
<appSettings>
  <add key="KeyNameString" value="which may contain passwords;"/>
</appSettings>
```

5. Edit the parameter values as needed.
6. Save and close the configuration file.
7. To re-encrypt the configuration file, run the encryption utility. See [Encrypting and decrypting the configuration files](#).

Note If you use RSA encryption, export the key, and install the encryption key file on any target TotalAgility servers imported the original encrypted configuration file.

8. Restart the Kofax TotalAgility Core Worker Server service.

Support export vertical scaling

By default, there is no export instance. An export instance is only spawned if there is an export activity that is ready for export. More export instances are spawned if there are more export activities that are ready for export. You can configure TotalAgility to support multiple export instances on an export server.

1. Navigate to the installation directory for the TotalAgility Server.
2. Open `Agility.Server.Core.ExportService.exe.config` in a text editor.
3. Locate the `<appSettings>` section and change the value of `MaxExportProcessesNumber` as needed. (Default: 0)

```
<appSettings>
  <add key="MaxExportProcessesNumber" value="0"/>
</appSettings>
```

Note Maximum number = Round of ((The number of machine processor count) * 1.25)

Maximum number = Round of ((The number of machine processor count) * 1.25)

The formula is only used if MaxExportProcessesNumber is less than or equal to 0. If the number is >= 1, the export processes count is equal to the defined value (MaxExportProcessesNumber).

Configure the wait time for export activities

You can configure the wait time for export activities in seconds so that the Export Service will wait for the configured seconds for new export activities to progress based on the availability of the child export processes.

If all the child export processes are in inactive mode (that is, there are no export activities available), TotalAgility Export Service will wait for the configured seconds for new export activities to process. If any child export process is in an active mode (that is, any child process is executing the Export activity), TotalAgility Export Service will instantaneously take new export activities to export without waiting for the configured seconds.

1. On the installation media, navigate to `\\TotalAgility\CoreWorkerService`.
2. Open `Agility.Server.Core.ExportService.exe.config` in a text editor.
3. Locate the **<appSettings>** section and change the value of "WaitForAvailableExportActivitiesTimeoutInSeconds" as needed. (Default: 30)

```
<appSettings>
  <add key="WaitForAvailableExportActivitiesTimeoutInSeconds" value="30"/>
</appSettings>
```

Note The minimum value for WaitForAvailableExportActivitiesTimeoutInSeconds is 1 and maximum value is 600.

You must restart the TotalAgility Export Service for the change to take effect.

Update settings for manual authentication

Perform the following steps on the Web or combined Web/Application server and Application Server.

Edit the setting manually or use the Configuration Utility for manual authentication.

Web server or combined Web/Application server

Perform the following steps on the Web or combined Web/Application server and Application Server.

Manually

1. Open the TotalAgility **Web.config** file from the following directory: `C:\Program Files\Kofax\TotalAgility\Agility.Server.Web`.

2. Locate the following bindings, "CustomBinding_CoreService", "BasicHttpBinding_Service" and "WebHttpBinding_Service" and comment out all the three security mode configurations for manual logon over http.

```
<!-- The following are the different options for securing the services -->
  <!-- All commented out is application manual logon over HTTP -->
  <!-- Only one option should be uncommented at a time -->
  <!-- Azure should use HTTPS SSL with application logon-->
  <!-- On premise default: HTTP with Windows authentication-->
  <!-- HTTPS SSL with application logon-->
  <!--<security mode="Transport">
    <transport clientCredentialType="None"/>
  </security>-->
  <!-- HTTP with Windows authentication-->
  <security mode="TransportCredentialOnly">
    <transport clientCredentialType="Windows" />
  </security>
  <!-- HTTPS SSL with Windows authentication-->
  <!--<security mode="Transport">
    <transport clientCredentialType="Windows" />
  </security>-->
```

Note In the TotalAgility Web.config file, under the section, TransformationServerExternalService_Binding, the "**security mode**" and "**transport clientCredentialType**" should be same as specified in the Transformation Server Web.config file.

Using the Configuration Utility

Run the Configuration Utility and change the mode of authentication on the Web settings tab as needed.

Application server

Manually

1. Open the TotalAgility **Web.config** file from the following directory: C:\Program Files\Kofax\TotalAgility\Agility.Server.Web.
2. Locate the following bindings, "CustomBinding_CoreService", "BasicHttpBinding_Service" and "WebHttpBinding_Service" and comment out all the three security mode configurations for manual logon over http.

```
<!-- The following are the different options for securing the services -->
  <!-- All commented out is application manual logon over HTTP -->
  <!-- Only one option should be uncommented at a time -->
  <!-- Azure should use HTTPS SSL with application logon-->
  <!-- On premise default: HTTP with Windows authentication-->
  <!-- HTTPS SSL with application logon-->
  <!--<security mode="Transport">
    <transport clientCredentialType="None"/>
  </security>-->
  <!-- HTTP with Windows authentication-->
  <security mode="TransportCredentialOnly">
    <transport clientCredentialType="Windows" />
  </security>
  <!-- HTTPS SSL with Windows authentication-->
  <!--<security mode="Transport">
    <transport clientCredentialType="Windows" />
  </security>-->
```

Using the Configuration Utility

Run the Configuration Utility and change the mode of authentication on the Web settings tab as needed.

Update settings for the TotalAgility linked servers

Edit the setting manually or use the Configuration Utility for manual authentication.

Manually

On installing TotalAgility, the Web.config file is updated automatically with machine name / TotalAgility for linked servers. If you want to connect from a public IP Address, you must update the Web.config file.

1. Open the TotalAgility **Web.config** file from the following directory: \\TotalAgility\Agility.Server.Web
2. Locate the following section and replace the IP Address with your machine name.

```
<add key="TotalAgilityHostNameLive" value = "<ip_address>/TotalAgility" />  
<add key="TotalAgilityHostNameDev" value = "<ip_address>/TotalAgility"/>
```

See the *Kofax TotalAgility help* for more information.

Using the Configuration Utility

Run the Configuration Utility and update the TotalAgilityHostNameLive key.

Alter the virtual root for the Kofax TotalAgility website

1. Open the TotalAgility **Web.config** file from the following directory: \\TotalAgility\Agility.Server.Web
2. Modify the following configuration keys to alter the virtual root for the Kofax TotalAgility website:

```
<add key="WebsiteBaseName" value="TotalAgility"/>  
<add key="ProcessDocumentsRootFolder" value="/TotalAgility/documents/process"/
```

Note The value for the "WebsiteBaseName" should be the name of the virtual directory used within the IIS.

Add custom job thread pools

A job thread performs multiple operations at a time, such as job evaluation, raising an exception job or ingestion through Kofax Import Connector. Multiple operations can lead to bottlenecks in the production systems. For example, when there are thousands of jobs to be archived, ingestion and job evaluation take longer time because the job threads are busy archiving jobs. Adding custom job thread pools, helps in achieving better throughput and prioritizing the background tasks.

You can add custom job thread pools, specify the number of threads in the thread pool and assign the worker task to a thread pool manually or use the Configuration Utility.

Manually

1. Navigate to the installation directory for the TotalAgility server.

2. In a text editor, open **Agility.Server.Core.WorkerService.exe.config** from the following directory:

```
\\TotalAgility\Agility.Server.Web
```

3. Locate the following section:

```
<configSections>
  <section name="CoreWorker" type="Agility.Server.Core.Worker.Configuration,
  Agility.Server.Core.Worker"/>
</configSections>
```

4. Add one or more job thread pools within the `CoreWorker` section and add worker tasks, as required. The following is a sample from the configuration file.

Example

```
<CoreWorker>
  <JobThreadPools>
    <add Id ="1" Size ="16" WorkerTasks ="ArchiveJobTask, DeleteItemTask,
  CreateExceptionTask, CreateJobTask, EvaluateJobTask,
  ProcessStateActionTask, IngestSystemTask, CaptureBatchTask "/>
  </JobThreadPools>
</CoreWorker>
```

Note You must assign the following worker tasks to some thread pool, otherwise, an error message is displayed and the Core Worker Service stops working. You cannot assign the same worker task to more than one thread pool.

- ArchiveJobTask
- EvaluateJob Task
- CreateException Task
- CreateJob Task
- IngestSystem Task
- CaptureBatch Task
- DeleteItem Task
- ProcessStateAction Task

5. Save and close the configuration file.
6. Restart the Kofax TotalAgility Core Worker service.

Using Configuration Utility

Run the Configuration utility and add or update the custom job thread pools, specify the number of threads in the thread pool and assign the worker task to a thread pool.

Add a thread pool monitoring interval

When long running automatic activities are processed by the Core Worker, the threads in the automatic activity thread pool are not freed up when the taken activity is reset due to timeout. Configure a thread pool monitoring interval to free up the threads for these long running taken activities to allow other activities to progress once they timeout.

You can configure the thread pool monitoring interval manually or use the Configuration Utility.

Manually

1. Navigate to the installation directory for the TotalAgility server.
2. In a text editor, open **Agility.Server.Core.WorkerService.exe.config** from the following directory:
\\TotalAgility\Agility.Server.Web
3. Locate the following section and add a thread pool monitoring interval (default:60).

```
<appSettings>  
  <add key="CoreWorkerThreadPoolMonitoringIntervalInSeconds" value="60"/>  
</appSettings>
```

4. Save and close the configuration file.
5. Restart the Kofax TotalAgility Core Worker service.

Using Configuration Utility

Run the Configuration utility and add the thread pool monitoring interval. See the *Kofax TotalAgility Configuration utility Guide*.

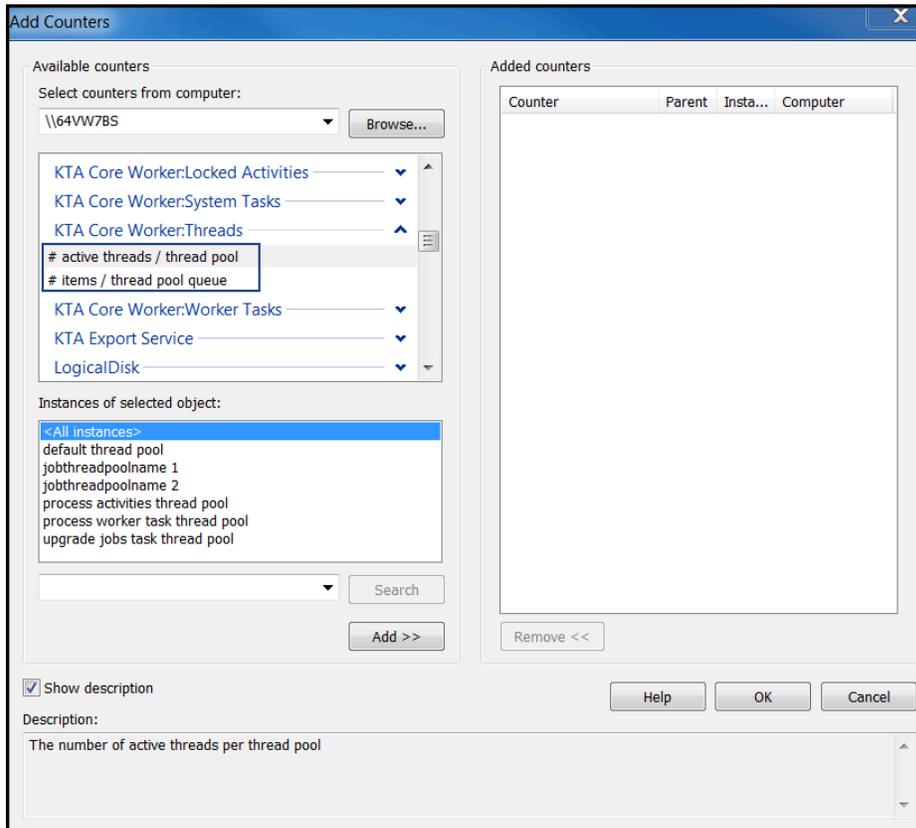
Add performance monitoring counters

Use the performance counters to record application states and activities.

The following categories for TotalAgility performance monitoring counters are automatically installed on the target machine when the Core Worker Service and the Export Service are installed:

- Kofax TotalAgility Core Worker: Locked Activities
- Kofax TotalAgility Core Worker: System Tasks
- Kofax TotalAgility Core Worker: Threads
- Kofax TotalAgility Core Worker: Worker Tasks
- Kofax TotalAgility Export Service
- Kofax TotalAgility Child Export Processes

Each category is associated with the performance counters. When the performance monitor is launched, you can select the installed counters and add to the current monitoring session. Each instance is recorded for a performance counter. For example, the Active Threads Per Thread pool performance counter records an instance per thread pool as shown in the image below.



You can log each performance counter to the TotalAgility log file by enabling the logging function. For more information on performance monitoring counters, see the *Kofax TotalAgility Administrator's Guide*.

Anti-Cross Site Request Forgery (CSRF) tokens

A CSRF attack relies on a user being authenticated on a website. The attack usually comes as an email or website hyperlink on which the user clicks while still authenticated. This URL then points back to the user's website and attempts to perform a privileged action (such as add an administrator account) without the user's knowledge. In TotalAgility, the TargetHostName and TargetPortNo settings are added as Anti-CSRF tokens in the Web.config file. The TargetHostName is the fully qualified domain name of the webserver and the TargetPortNo is the website port number. When you provide for these settings, the Anti-CSRF origin and referrer validations are performed on the request URL. If the validation fails, the request will be terminated considering it as a potentially dangerous request.

You can configure the Anti-CSRF tokens in the Web.config manually or using the Configuration Utility.

Manually

1. Navigate to the installation directory for the TotalAgility server.
2. In a text editor, open Web.config from the following directory: `\\TotalAgility\Agility.Server.Web`.

3. Locate the following section and specify the target host name and target port number.

```
<appSettings>
  <add key= "TargetHostName" value="<hostnamegoeshere"/>
  <add key= "TargetPortNo" value="443"
  </appSettings>
```

4. Save and close the configuration file.

Using the Configuration Utility

Run the Configuration utility and specify the TargetHostName and TargetPortNo settings. See the *Kofax TotalAgility Configuration Utility Guide*.

Install the language pack

The languages files are available at the following location in the installation directory:

```
\\TotalAgility\Agility.Server.Web\LocalizationFiles
```

After installing TotalAgility, import <Language>.zip using the "Import Languages" feature of the TotalAgility Form Designer.

When you change your browser to one of the supported languages, the corresponding translation is displayed.

Note Only the Workspace is localized according to the browser display language after installing the language pack.

Install the .NET Framework language packs

To localize the system error messages from .NET, you must install the .NET Framework language packs on both the Web and Application servers.

You can download the .NET Framework language pack from the Microsoft website.

Access TotalAgility documentation

You can access help online as well as in offline mode.

Online documentation

The product documentation for Kofax TotalAgility 7.6.0 is now available at the following location:

<https://docshield.kofax.com/Portal/Products/KTA/7.7.0-o3xtk9orwd/KTA.htm>

To launch the online help for the installed version of the product, click the Help icon on the application.

Note

- After upgrading to TotalAgility 7.6.0 from an earlier version, to view the TotalAgility Workspace help, you must import the WorkspaceHeader form from the TotalAgility Workspace package.
- When upgrading to TotalAgility 7.6.0 from an earlier version, ensure that the check box for "Import system Workspace package" is selected to view the Workspace help online; otherwise, you must import the WorkspaceHeader form from the Workspace package.

Offline documentation

To access the documentation offline, you can download it from the [Kofax Fulfillment Site](#). For each language, a separate documentation package is available to download as a compressed file, such as Kofax TotalAgilityDocumentation7.5.0_EN.zip for English or Kofax TotalAgilityDocumentation7.5.0_FR.zip for French.

The English .zip file includes both help and print folders. The print folder contains all guides, such as installation guide and administrator's guide. The .zip files for other languages contain only the localized help files.

1. From the Kofax Fulfillment Site, download the documentation.zip file for the applicable language.

2. Extract the contents of the compressed documentation file and do the following:

Note In a distributed environment, perform copying files on the Web server, and the Web.config changes on the Application and Web servers.

- Copy the contents of the extracted TotalAgility_help to:
\\TotalAgility\Agility.Server.Web\Help\TotalAgility_designer
- Copy the extracted KTAW_EN (for Workspace help in English) folder to:
\\TotalAgility\Agility.Server.Web\Help
- Copy the extracted KTAWCC_EN (for Web Capture control help in English) folder to:
\\TotalAgility\Agility.Server.Web\Help
- Copy the extracted ProjectBuilder (Transformation Designer in English) folder to:
<%ProgramFiles%>\Kofax\Transformation\Help\en_US\
- Copy the extracted TotalAgility_opmt_help folder to:
\\TotalAgility\Agility.Server.Web.TenantManagement\TenantManagement\Help
- Copy the extracted TotalAgility_KEC_help folder to:
\\TotalAgility\Agility.Server.Web\Help\ExportConnector_help
- Copy the contents of the extracted ThinClientServer help to:
\\TotalAgility\Agility.Server.Web\Forms\Controls\Capture\help
- Copy the contents of KFS_adminconsoleTA (Devices help) to:
\\TotalAgility\Agility.Server.Web\bin\Administrative\Help
- Copy the contents of TotalAgility_repositorybrowser help to:
\\TotalAgility\Agility.Server.Web\Help\TotalAgility_repositorybrowser
- Copy the contents of the extracted SDK_Documentation to:
\\TotalAgility\Agility.Server.Web\Help\API
- Copy the contents of the extracted TotalAgility_documentconverterhelp to:
\\Kofax\Document Converter\web\help
- Copy the contents of the extracted KIC_mchelp to:
\\Kofax\KIC-ED\MC\web\en\WebHelp

3. Navigate to the installation folder and do the following:
 - For TotalAgility help and Devices help:
 - a. Open TotalAgility Web.config in a text editor from the following location:
`\\TotalAgility\Agility.Server.Web`
 - b. Locate the <appSettings> section and remove `http://docshield.kofax.com/KTA` from the key value: `<add key="OnlineHelpURL" value="http://docshield.kofax.com/KTA"/>`.
Alternatively, run the Configuration Utility (available from the Installation media: `\\TotalAgility\Utilities\ConfigurationUtility`) and remove the URL for online help from the OnlinehelpURL setting.
 - For Kofax Export Connector help:
 - a. Open Agility.Server.ExportConnector.exe.config in a text editor from the following location:
`\\TotalAgility\Agility.Server.Web\bin`
 - b. Locate the <appSettings> section and remove `http://docshield.kofax.com/KTA` from the key value: `<add key="OnlineHelpURL" value="http://docshield.kofax.com/KTA"/>`.
 - For Message Connector help:
 - a. Open configuration.xml in a text editor from the following location:
`\\Kofax\KIC-ED\MC\web`
 - b. Locate the <OnlineHelp>1</OnlineHelp> section and replace 1 with 0.
 - For Document Converter help:
 - a. Open configuration.xml in a text editor from the following location:
`\\Kofax\Document Converter\web`
 - b. Locate the <OnlineHelp>1</OnlineHelp> section and replace 1 with 0.
4. Save and close the configuration file.
Clicking the Help icon will launch the help for the installed product.

Run EVRSCheck utility

The EversCheck utility helps in testing how an image will look once the eVRS setting is applied to it. The left half of the application window displays the original image and the right half displays the processed image once the setting is applied to it.

1. Run the **EversCheck.exe** available at the following location in the Installation folder:
`\\TotalAgility\Utilities\EversCheck`
The Before and After window opens.
2. Click **Choose** and select an image.
The selected image with its metadata appears in the left half of the window. If the selected image is a multi-page image, you can use the "<" and ">" buttons to navigate between pages.

3. Copy the desired eVRS setting and paste it into the **eVRS Settings** box. The image is processed based on the eVRS settings. The output along with its metadata is displayed in the right half of the window.

Note You can edit the eVRS setting; the image starts reprocessing as you type.

Chapter 3

Transformation Server Bundle installation

The Transformation Server Bundle includes:

- Transformation Server
- Transformation Core modules

To install any component, you must install the entire Transformation Server Bundle.

Either install the Transformation Server Bundle when you install TotalAgility, or install the Transformation Server Bundle separately.

Note

- Before installing the Transformation Server Bundle, it may be necessary to install the USERTrust Certificate and the DigiCert Assured ID Root CA Certificate in your environment. The installation may fail if these certificates are missing.
- For development environments, install the Transformation Server Bundle where you installed TotalAgility. For production environments, install the Transformation Server Bundle on a separate computer.
- If you install Transformation Server or Transformation Designer independent of TotalAgility, make sure the supported version of .NET Framework is already installed on that machine.
- The user who will run the Transformation Server must have "Log on as Service" rights. Also, the user who is running Transformation Server will be used for all communication channels where Windows authentication is used. For example, if Windows authentication is being used for SQL Server, this user must have rights on this server, otherwise Transformation Server will not work.
- After installing the Transformation Server, you can modify the configuration settings by editing the Transformation Server configuration file or by running the configuration utility. See the *Kofax TotalAgility Configuration Utility Guide*.

Perform a silent installation

This section describes installing the Transformation Server Bundle silently, independent of TotalAgility.

1. On the installation media, navigate to \\TotalAgility\Transformation Server.
2. On the Command prompt window, run the following command:

```
TransformationServerSetup.exe /quiet /log %LogFile% TS_INSTALLLOCATION=
%InstallLocation% TS_SERVICE_ACCOUNT=%WindowsServiceAccount%
TS_SERVICE_PASSWORD=%WindowsServicePassword% TS_USE_SPECIFIC_POOL=
%UseSpecificPool% TS_POOL_NAME=%PoolName% TS_OL_ENABLED=%OLEnabled
% TS_WCF_PORT=%WcfPort% TS_RESERVED_SLOTS=%ReservedSlots%
TS_OVERRIDE_DEF_SLOTS=%OverrideDefSlots% TS_MAX_SLOTS=%MaxSlots%
```

```

TS_ENABLE_SYNC_CALLS=%EnableSyncCalls% TS_SYNCHRONOUS_ONLY=FALSE
TS_STARTSERVICE=TRUE TS_MAIN_DB_CONNECTION_STRING=
%MainDBConnectionString% TS_AUDIT_DB_CONNECTION_STRING=
%AuditDBConnectionString% TS_REPORTING_STAGING_DB_CONNECTION_STRING=
%ReportingStagingDBConnectionString% TS_ARCHIVE_DB_CONNECTION_STRING=
%ArchiveDBConnectionString%

```

Tip Optionally, call `TS_SETUP_CONFIG_FILE` in the installation command. This property requires an absolute path to a configuration file for the installer. The configuration file can have one parameter per line only. Using such a configuration file will prevent the `setup.exe` from logging sensitive data.

TS_SETUP_CONFIG_FILE example:

```

TS_INSTALLLOCATION="<<Installation path>\Kofax\TotalAgility\Transformation Server\"
TS_SERVICE_ACCOUNT=**account name**
TS_SERVICE_PASSWORD=**Password**
TS_SERVER_SERVICE_URL= https://**Name/IP**/TotalAgility/Services/Core/
ServerService.svc
TS_USE_SPECIFIC_POOL=FALSE
TS_POOL_NAME=
TS_OL_ENABLED=TRUE
TS_WCF_PORT=9001
TS_RESERVED_SLOTS=0
TS_OVERRIDE_DEF_SLOTS=
TS_MAX_SLOTS=0
TS_ENABLE_SYNC_CALLS=TRUE
TS_MAIN_DB_CONNECTION_STRING=Server=**Name/
IP**;Trusted_Connection=Yes;Database=**DB Name**;
TS_AUDIT_DB_CONNECTION_STRING=Server=localhost;Trusted_Connection=Yes;Database=TotalAgility;T
TS_STARTSERVICE=TRUE
TS_SYNCHRONOUS_ONLY=false

```

See the Transformation Server Info section in [Silent installation of Web and Application on the same server](#) for more information on the Transformation Server parameters.

The parameter names are case-sensitive. If the value of a parameter has spaces, enclose the value in quotation marks.

3. To ensure that the installation works as expected, perform the following steps.
 - a. Navigate to and edit the `web.config` file that is located at `<%Program Files%>\Kofax\TotalAgility\Agility.Server.Web`.
 - b. Locate the `TransformationServerExternalService_Binding` binding parameter and ensure that the `transport clientCredentialType` value is set to `Windows`.
 - c. Save and close the `web.config` file.

Perform a standard installation

1. Ensure that the user who will run the Transformation Server has **"Log on as Service"** rights.

2. Access the Transformation Server Bundle installer from one of the following methods:
 - Production systems: Install the Transformation Server Bundle separately from TotalAgility. Navigate to **Transformation Server\Transformation Server** on the installation media and run one of the following commands:
 - To install without creating a log file, run **TransformationServerSetup.exe**.
 - To install and create a log file, run **setup.exe/log <path\install_log.txt>** where <path \install_log.txt> is the path and name of the log file.
 - Development systems: If you are installing the Transformation Server Bundle as part of the TotalAgility installation, the Transformation Server Bundle installer opens automatically.
3. Click **Install**.

The system installs any necessary prerequisites.
4. Click **Next**.

The **Transformation Server Setup** window opens.
5. Click **Next**.
6. In the license agreement window, select **I accept the terms in the License Agreement**.

This window is not displayed if the Transformation Server is installed automatically as part of TotalAgility installation.
7. Click **Next**.

The system prompts you for a destination folder for the Transformation Server.
8. Enter the destination and click **Next**.
9. In the **Service Account Setup** window, enter the credentials for the user who will run the Transformation Server. These credentials are also used to encrypt sensitive data.
 - a. In the **Username** field, enter the user name. To specify a domain user, enter the user name in the format Domain\User.
 - b. Enter and confirm the **Password**.
 - c. Click **Next**.

The **Setting up connection data** window opens.
10. Enter the connection string for the Main, Archive, Audit and Reporting_Staging databases to connect to and authenticate with the databases.

Use the following syntax:

```
Server=<server address>;Database=TotalAgility;User ID=<user_name>;  
Password=<password>;
```

If installing on split web/app, use the following syntax:

```
Server=<server name>; Trusted_Connection=yes; Database=<database name>;
```

Specify the address of the database server and the user name and password to authenticate with database where indicated. Example:

```
Server=dbserver\dbinstance;Database=TotalAgility;User  
ID=dbo_id;Password=dbopassword;
```
11. Click **Next**.

12. Specify the connection options:

- a. To enable the Transformation Server to process online learning tasks, select **Enable Online Learning processing by this Transformation Server instance**.
- b. Optionally, select **Process activities from specific Transformation Server pool** and select a **Pool name**.

Note To select the default pool, select **Default Transformation Server Thread Pool**.

- c. Click **Next**.

13. Click **Next**.

The **Advanced execution options** window opens. These options control the slots reserved for incoming high-priority activities.

14. Select the advanced execution options:

- Select **Enable synchronous calls processing** to select the TCP/IP port and number of reserved processing slots. The default TCP/IP port is 9001, and the number of reserved processing slots is 0.

Note If you are upgrading from version 7.0.0, "**Enable synchronous calls processing**" is disabled if the number of reserved processing slots is zero and enabled if there are one or more reserved processing slots.

- Select **Override default number of processing slots** to specify a number of slots other than the default.

Click **Next**.

15. Click **Install** to install the Transformation Server.

The system displays the installation status and a message when Transformation Server setup is complete.

16. Click **Finish** to continue.

The system displays the Transformation Server Bundle setup status and a message when the Transformation Server Bundle setup is successful.

17. Click **Close** to close the success message window.**18.** To ensure that the installation works as expected, perform the following steps.

- a. Navigate to and edit the web.config file that is located at `<%Program Files%>/Kofax/TotalAgility/Agility.Server.Web`.
- b. Locate the `TransformationServerExternalService_Binding` binding parameter and ensure that the `transport clientCredentialType` value is set to `Windows`.
- c. Save and close the web.config file.

19. From the Service console, start the **Kofax Transformation Server** service.**20.** If applicable, restart the anti-virus or firewall applications.

Encrypt and decrypt the configuration file

The configuration file includes the Transformation Server settings, including sensitive information. Therefore, we recommend that you encrypt this file. The Transformation Server supports two encryption methods depending on command line parameters:

- DPAPI encryption: Because you must decrypt the file on the same machine where it was encrypted, use this utility to encrypt one server at a time. See [Use Kofax.CEBPM.EncryptConfig.exe](#).
- RSA encryption: An algorithm for public key encryption and digital signatures that uses two separate keys. Create a key and encrypt the configuration file on one Transformation Server, and export the key to all the other Transformation Servers. All the Transformation Servers with the exported key installed can access the configuration file. Use this method if you have several Transformation Servers with the same configuration (TAService ID, pool name, and so on). See [Use RSA encryption](#).

To decrypt the configuration file, see [Decrypting the configuration file](#).

Use Kofax.CEBPM.EncryptConfig.exe

The Kofax.CEBPM.EncryptConfig.exe utility encrypts (-enc) or decrypts (-dec) the CPUServer and appSettings sections of the configuration file. The CPUServer section includes the TotalAgility Session ID. The appSettings section includes the user ID and password as well as other information. Use the optional -h flag to display help for the command.

Encrypt a File with Kofax.CEBPM.EncryptConfig.exe

Run the utility on each Transformation Server individually.

1. Stop the Transformation Server service.
2. Navigate to the Transformation Server installation directory and open a command Prompt window.
3. Run the following command:

```
Kofax.CEBPM.EncryptConfig.exe -f Kofax.CEBPM.CPUServer.ServiceHost.exe.config -s "appSettings" -p DPAPIProtection -enc
```

Use RSA encryption

Use RSA encryption to encrypt the configuration file, export the key, and install the encryption key file on multiple Transformation Servers. Use this method if you have several Transformation Servers with the same configuration (TAService ID, pool name, and so on).

The following instructions differentiate between the source Transformation Server where you create the key and the target Transformation Servers onto which you import the key.

Prepare the key

Perform these steps on one source Transformation Server.

1. Create the custom RSA key container:

- a. Log on to the Transformation Server with administrator rights.
- b. Open a Command Prompt window.
- c. Navigate to the .NET Framework version 4.0 directory. For example, enter the following command:

```
cd \WINDOWS\Microsoft.Net\Framework\v4.0.*
```

- d. Run the following command:

```
aspnet_regiis -pc "<KeysFile>" -exp
```

where:

- <KeysFile> is the name of the key file.
- The -exp option makes the key exportable.

2. Run the following command to grant the Transformation Server service user permission to read the <KeysFile> RSA container file.

```
aspnet_regiis -pa "<KeysFile>" "<TSserviceuser>"
```

where:

- <KeysFile> is the name of the key file you created in Step 1d.
- <TSserviceuser> is the Transformation Server service user.

3. Encrypt the file:

- a. Log on to the Transformation Server as the Transformation Server service user.
- b. Navigate to the installation directory for the Transformation Server and open a Command Prompt window.
- c. Run the following command:

```
Kofax.CEBPM.EncryptConfig.exe -f  
Kofax.CEBPM.CPUServer.ServiceHost.exe.config -s "appSettings" -p  
RSAProvider -enc
```

This command encrypts the CPUServer and appSettings sections of the configuration file. The CPUServer section includes the TotalAgility Session ID. The appSettings section includes the user ID, password and other information.

4. Export the key by running the following command:

```
aspnet_regiis -px "<KeysFile>" "<c:\keys.xml>" -pri
```

where:

- <KeysFile> is the default keystore keyContainerName.
- <c:\keys.xml> is the path and file name of the exported key file.

Import the key

Perform these steps on every target Transformation Server.

1. Import the key:
 - a. Log on to the Transformation Server with Administrator rights.
 - b. Copy the keys.xml file from the source Transformation Server to the root C:\ directory of the target Transformation Server.
 - c. Open a Command Prompt window.
 - d. Run the following command:

```
aspnet_regiis -pi "<KeysFile>" "c:\keys.xml"
```

where:
 - <KeysFile> is the default name of the key file.
 - <c:\keys.xml> is the path and file name to the imported key file.
 - e. Delete the keys.xml because it contains the unprotected private key.
2. Run the following command to grant the Transformation Server service user permissions to use the <KeysFile> RSA container file:

```
aspnet_regiis -pa "<KeysFile>" "TSserviceuser"
```

where:
 - <KeysFile> is the name of the key file you imported in step 1.
 - <TSserviceuser> is the Transformation Server service user.
3. Repeat these steps on all remaining Transformation Servers.

Decrypt the configuration file

1. Stop the Transformation Server service.
2. Navigate to the Transformation Server installation directory and open a command-line window.
3. Run the following command:

```
Kofax.CEBPM.EncryptConfig.exe -f  
Kofax.CEBPM.CPUServer.ServiceHost.exe.config -s "appSettings" -p  
DPAPIProtection -dec
```

Edit the configuration file

Modify the Transformation Server configuration file, **Kofax.CEBPM.CPUServer.ServiceHost.exe.config** if the system configuration has changed, or when you need to resolve a technical or performance issue.

1. If you encrypted the configuration file after you installed the Transformation Server, decrypt the file. See [Decrypt the configuration file](#) .

Note If you used RSA encryption, decrypt the configuration file only on the source Transformation Server where you initially encrypted the file.

2. Go to the installation directory for the Transformation Server and locate **Kofax.CEBPM.CPUServer.ServiceHost.exe.config**.

3. Back up the file and save it in a secure location.

4. Open the file in a text editor.

5. To change system configuration options, modify the keys in the <appSettings> section.

The section contains a list of keys for setting configuration options. The ones that can be modified have comments that describe the setting and supported values, as in this example.

```
<!-- Maximum number of instances allowed for Executor Process -->
  <add key="MaxNumberOfTenantProcesses" value="1"/>
```

6. Change the value within the quotation marks to a supported value, as indicated in the comments.

7. To change how errors are reported in the application event log, which can be viewed in the Event Viewer, modify the <system.diagnostics> section as follows:

- a. Under <switches>, locate the following element:

```
<add name="TraceLevelSwitch" value="Warning"/>
```

By default, the value is set to Warning, which reports error and warning messages. Change the value to any of the options listed in the comment to change the type of messages reported.

- b. Under <sharedListeners>, locate the following line:

```
<add name="CPUServerLogTxt"
  type="Kofax.CEBPM.CPUServer.Common.Diagnostics.DateTimeTaggedTraceListener,
  Kofax.CEBPM.CPUServer.Common" initializeData="KofaxCPUServerLog.log" >
```

To specify a different log file or change the format for **timestamps**, change the value of **initializeData** as shown in the comments in the file.

8. Save and close the configuration file.

9. To re-encrypt the configuration file, run the encryption utility. See [Encrypt and decrypt the configuration file](#).

Note If you used RSA encryption, export the key, and install the encryption key file on any target Transformation Servers imported the original encrypted configuration file.

10. Restart the Kofax Transformation Server service.

Install the NLP language packs manually

If the Transformation Designer is installed on a separate server than the Transformation Server Bundle in your solution, then you need to install the Kofax NLP engine language packs on the machine where Transformation Designer is installed. This is because the Kofax NLP engine language packs are installed by the Transformation Server Bundle only, and these languages are required to use the Kofax NLP functionality in Transformation Designer and in production.

To install the Kofax NLP engine language packs, you need access to the original Kofax TotalAgility installation zip file.

You can install the Kofax NLP engine language packs by following these steps.

1. Navigate to the `TotalAgility\TransformationServer` \KofaxTransformation_Salience6.4 path inside the extracted Kofax TotalAgility installation zip file.
2. Double-click on one of the following `.MSP` files depending on what languages you are supporting.
 - **KofaxTransformation_SalienceV6.4.0_LanguageBundle_western-default.**
Run to install English, Spanish, Portuguese, French, and German support.
 - **KofaxTransformation_SalienceV6.4.0_LanguageBundle_western-extended.**
Run to install Italian, Romanian, and Dutch support.
 - **KofaxTransformation_SalienceV6.4.0_LanguageBundle_extended.**
Run this to install Japanese, Chinese, and Korean support.

A Windows Installer window appears and then installs the selected Kofax NLP languages automatically.

The installer window closes when the installation is complete.

3. Optionally, double-click on another language installer if you want to support additional languages.

Upgrade Transformation Server using silent install

If you want to upgrade the Transformation Server, you can use the following command, replacing the example content with your own environment.

```
setup.exe /quiet /Upgrade /log installation.log TS_SERVER_SERVICE_URL=http://<Server>/TotalAgility/Services/Core/ServerService.svc TS_INSTALLLOCATION="<Program Files>\Kofax\TotalAgility\Transformation Server" TS_MAIN_DB_CONNECTION_STRING="Server=servername;Database=databasename;UserId=sa;Password=password" TS_SERVICE_ACCOUNT=serviceAccountName TS_SERVICE_PASSWORD=password TS_STARTSERVICE=TRUE
```

Uninstall the Transformation Server

Uninstall Transformation Server depending on how you have installed it.

- When you install Transformation Server as part of Kofax TotalAgility standard installation, uninstalling Kofax TotalAgility will automatically uninstall Transformation Server.
- When you install Transformation Server on a separate system, uninstall the Transformation Server Bundle from the Control Panel.
- To uninstall in a silent mode, do the following:
 - Navigate to the root directory of TransformationServerSetup.exe.
 - Run `TransformationServerSetup.exe / uninstall / quiet.`
The system uninstalls the Transformation Server and automatically creates a log file in the temporary files folder. This log file contains information on errors, if any.

Chapter 4

Reporting Server installation

This chapter describes two methods for installing the Kofax Reporting Server:

- [Silent installation](#) of Reporting Server independent of TotalAgility
- [Standard installation](#) using the installation wizard.

For development environments, install the Reporting Server where you installed TotalAgility. Otherwise, install the Reporting Server on a separate system in the same domain where you installed TotalAgility.

Note If you choose to install the Reporting Server on a separate system in the same domain where you installed TotalAgility, then you must assign the following roles to service account:

- For the Staging database: kfx_staging
- For the data warehouse: kfx_etl, kfx_reader, kfx_advanced_reader

Perform a silent installation

The section describes the silent installation of the Reporting Server, independent of TotalAgility.

See the following table for the silent installation parameters required to install the Reporting Server.

| Parameter | Default Value | Description |
|------------------|---|---|
| INSTALLLOCATION | C:\Program Files\Kofax \TotalAgility\ Reporting Server\ | Specify the Reporting Server destination directory. |
| WINSERV_ACCOUNT | no default | Enter the name of the user who will run the Reporting Server. To specify a domain user, enter the user name in the format Domain\User. Ensure that the account details are correct, as under this account Reporting Server authenticates in all places where Windows authentication is used. Example, TotalAgility database. All communication and resource access is run under this account. Therefore, the account under which Reporting Server is running must not be a dummy account. |
| WINSERV_PASSWORD | no default | Enter the Password for the user. |

| Parameter | Default Value | Description |
|--|---------------|---|
| MAIN_DB_CONNECTION_STRING | no default | Enter the connection string for the Main database. Example: "Server=<hostname>;Trusted_Connection=Yes;" "Database=TotalAgility;" |
| AUDIT_DB_CONNECTION_STRING | no default | Enter the connection string for the Audit database. |
| REPORTING_STAGING_DB_CONNECTION_STRING | no default | Enter the connection string for the Reporting Staging database. |
| REPORTING_WORKHOUSE_DB_CONNECTION_STRING | no default | Enter the connection string for the Reporting Workhouse database. |

Note Parameter names are case-sensitive.

1. On the installation media, navigate to `\\TotalAgility\Reporting\TAReportingService`.
2. Run the following command:

```
msiexec.exe /i Kofax.Reporting.TAService.msi /q WINSERV_ACCOUNT=
%WindowsServiceAccount% WINSERV_PASSWORD=%WindowsServicePassword
% MAIN_DB_CONNECTION_STRING="%MainDBConnectionString%"
INSTALLLOCATION="%InstallLocation%"
AUDIT_DB_CONNECTION_STRING="%AuditDBConnectionString%"
REPORTING_STAGING_DB_CONNECTION_STRING="%ReportingStagingDBConnectionString%"
% REPORTING_WAREHOUSE_DB_CONNECTION_STRING="%ReportingConnection%"
```

Perform a standard installation

1. On the Installation media, navigate to `TotalAgility > Reporting > TAReportingService > Kofax.Reporting.TAService.msi`.
The TotalAgility Reporting Server Setup window opens.
2. Click **Next**.
3. In the End-User License Agreement window, select **I accept the terms** in the License Agreement and click **Next**.
4. In the Destination Folder window, select the default folder (`C:\Program Files (x86)\Kofax\TotalAgility\Reporting Server\`) for the Reporting server or click **Change** to choose another folder.
5. Click **Next**.

6. In the Service Account Setup window, enter the credentials for the user who will run the Kofax TotalAgility Reporting Server service:

- a. In the Username field, enter the username.

Note To specify a domain user, enter the username in the format Domain\User.

- b. Enter and confirm the Password.

- c. Click **Next**.

7. In the Obtaining TotalAgility Configuration window:

- a. Specify TotalAgility Server service URL in the following format: `http://<server_name>/TotalAgility/Services/Core/ServerService.svc`

Here <server_name> is the TotalAgility server name.

Note To install Web Service over SSL, use 'https://' instead of 'http://' in the URL.

- b. In the Main DB connection string box, enter the connection string for the TotalAgility database.

- c. Click **Next**.
The system downloads the configuration settings.

8. Click **Install** to begin installation.

9. Click **Finish**.

Uninstall the Reporting Server

Uninstall the Reporting Server depending on how you have installed it.

- When you install the Reporting Server as part of Kofax TotalAgility standard installation, uninstalling TotalAgility will automatically uninstall the Reporting Server.
- When you install the Reporting Server on a separate system using the Wizard, uninstall the Reporting Server from the Control Panel.
- If you install the Reporting Server in a silent mode, you must do the following to uninstall the Reporting Server in a silent mode:
 1. On the Command Prompt, change the command line to the root directory of the `Kofax.Reporting.TAService.msi` file.
 2. Run `msiexec.exe/quiet/x Kofax.Reporting.TAService.msi/L*V"%LogFileName%".`
The system uninstalls the Reporting Server and automatically creates a log file in the temporary files folder. This log file contains information on errors, if any. You can use `"msiexec/help"` (Windows installer help) to check options for the installation and logging.

Chapter 5

Integrate Microsoft SharePoint with TotalAgility

Set up the SharePoint server and the TotalAgility server for using SharePoint in TotalAgility.

Note The SharePoint integration components should not be installed on the same machine where TotalAgility is installed.

1. Navigate to \\SharePointInstallation on the installation media, and double click **Setup.exe**.
The system opens the TotalAgility for SharePoint Setup wizard.
2. Click **Next**.
The system displays the TotalAgility SharePoint Components window.
3. Select the TotalAgility SharePoint components to install.
 - a. To install the SharePoint web parts, select the **TotalAgility SharePoint WebParts** check box.
 - b. To install the SharePoint web service and event-handler dlls, select the **TotalAgility SharePoint Event-Handling Components** check box.
 - c. To install the TotalAgility SharePoint custom pages, select the **TotalAgility SharePoint Custom Pages** check box.
 - By default, the **Add Assembly To GAC** check box is selected. The files are automatically added to Global Assembly Cache.
 - If you do not have access to GAC, clear the **Add Assembly To GAC** check box and enter the SharePoint Site Port Number. The files are automatically added to the bin folder (default location is `C:\inetpub\wwwroot\wss\VirtualDirectories\[PortNumber]\bin`) within the site.
 - d. On the list of **Website to host TotalAgility SharePoint components**, select a website.

Note You must not select the SharePoint related websites.

Note You can rerun the setup at a later date to install the custom pages if you did not do it initially.

4. Click **Install**.
5. Update the **Web.config** file to get custom pages, support event handlers and configure SharePoint site. See [Update the Web.config File](#).

Further configure:

- [TotalAgility custom web pages in SharePoint](#).
- [TotalAgility Web parts in the SharePoint server](#).
- [Microsoft SharePoint Server and TotalAgility to provide fault tolerance](#).

Configure the Application Pool for the SharePoint communicator site

1. Ensure that SharepointAppPool user should be either Primary or Secondary site collection administrator.
2. Ensure that this user also resides in TotalAgility.

Note You can get this information from the appropriate SharePoint site.

3. Configure the same application pool in the SharePoint communicator site.

Update the Web configuration file

Update the Web.config file for the TotalAgility components.

To get custom pages

Add the following optional “appsettings” key values to the Web.config file in the target SharePoint web application folder. For example, `C:\inetpub\wwwroot\wss\VirtualDirectories\[PortNumber]` where [PortNumber] is the port number of the target SharePoint web application.

| Appsetting | Description | If not specified |
|---------------------------------|--|---|
| TAEmbeddedSolutionURL | Point to the TotalAgility site URL to integrate into the SharePoint web application. | The TotalAgility Form site is available at the same location as the SharePoint web application. |
| TALogonUserIdentifier | Point to the identifier that passes the SharePoint logon user name into embedded forms in TotalAgility Forms site. | The LOGON_USER is used as the identifier. |
| TAWorkqueueEmbeddedForm: | Point to the form in the TotalAgility Form site to use in the Workqueue custom page. | The WorkQueue.form is used. |
| TAJobListEmbeddedForm | Point to the form in the TotalAgility Form site to use in the JobList custom page. | The JobList.form is used. |
| TADocURLIdentifier | Point to the identifier that passes the SharePoint document URL into embedded CreateNewJob forms in TotalAgility. | The DOC_URL is used. |
| TADocNameIdentifier | Point to the identifier that passes the SharePoint document name into embedded CreateNewJob forms in TotalAgility. | The DOC_NAME is used. |

Example: Settings in Web.config file to get custom pages

```
<appSettings>
<add key="TAEmbeddedSolutionURL" value="http://<TAServer name/IP>:80/Totalagility/Forms" />
<add key="TALogonUserIdentifier" value="LOGON_USER" />
<add key="TAWorkqueueEmbeddedForm" value="WorkQueue.form" />
<add key="TAJobListEmbeddedForm" value="JobList.form"/>
<add key="TADocURLIdentifier" value="DOC_URL"/>
<add key="TADocNameIdentifier" value="DOC_NAME"/>
</appSettings>
```

Note If the value of TAEmbeddedSolutionURL key is cross domain, remove the following section from the TotalAgility Web.config file: <add name="X-Frame-Options" value="SAMEORIGIN"/>

To load the assembly from GAC

If you select to add assembly from GAC during installation, then edit the Sharepoint Web.config file with the following:

```
<system.web>
  <compilation>
    <assemblies>
      <add assembly="Agility.Server.Integration.Sharepoint.CustomPages,
Version=1.0.0.0, Culture=neutral, PublicKeyToken=d86c87abe4a71948" />
    </assemblies>
  </compilation>
</system.web>
```

To support event handlers

Note If you copy and paste the code from this guide, fix the line breaks.

```
<configSections>
<section name="exceptionHandling"
type="Microsoft.Practices.EnterpriseLibrary.
ExceptionHandling.Configuration.ExceptionHandlingSettings,
Microsoft.Practices.EnterpriseLibrary.ExceptionHandling,
Version=5.0.505.0,
Culture=neutral,
PublicKeyToken=31bf3856ad364e35"
requirePermission="true" />
<section name="loggingConfiguration"
type="Microsoft.Practices.EnterpriseLibrary.
Logging.Configuration.LoggingSettings,
Microsoft.Practices.EnterpriseLibrary.Logging,
Version=5.0.505.0,
Culture=neutral,
PublicKeyToken=31bf3856ad364e35" requirePermission="true" />
</configSections>

<loggingConfiguration
name=""
tracingEnabled="true"
defaultCategory="General">
<listeners>
<add name="Event Log Listener"
type="Microsoft.Practices.EnterpriseLibrary.Logging.
TraceListeners.FormattedEventLogTraceListener,
```

```
Microsoft.Practices.EnterpriseLibrary.Logging,
Version=5.0.505.0,
Culture=neutral,
PublicKeyToken=31bf3856ad364e35"
listenerDataType="Microsoft.Practices.EnterpriseLibrary.
Logging.Configuration.FormattedEventLogTraceListenerData,
Microsoft.Practices.EnterpriseLibrary.Logging,

Version=5.0.505.0, Culture=neutral,
PublicKeyToken=31bf3856ad364e35"
source="Total Agility" formatter="Text Formatter"
log="" machineName="." traceOutputOptions="None" />
</listeners>
<formatters>
<add type="Microsoft.Practices.EnterpriseLibrary.Logging.
Formatters.TextFormatter,
Microsoft.Practices.EnterpriseLibrary.Logging,
Version=5.0.505.0,
Culture=neutral,

PublicKeyToken=31bf3856ad364e35"
template="Timestamp: {timestamp}
{newline}&#xA;Message: {message}
{newline}&#xA;Category: {category}
{newline}&#xA;Priority: {priority}
{newline}&#xA;EventId: {eventid}
{newline}&#xA;Severity: {severity}
{newline}&#xA;Title:{title}
{newline}&#xA;Machine: {localMachine}
{newline}&#xA;App Domain: {localAppDomain}
{newline}&#xA;ProcessId: {localProcessId}
{newline}&#xA;Process Name: {localProcessName}
{newline}&#xA;Thread Name: {threadName}
{newline}&#xA;Win32 ThreadId:{win32ThreadId}
{newline}&#xA;Extended Properties:
{dictionary({key} - {value}{newline})}"
name="Text Formatter" />
</formatters>
<categorySources>
<add switchValue="All" name="General">
<listeners>
<add name="Event Log Listener" />
</listeners>
</add>
</categorySources>
<specialSources>
<allEvents switchValue="All" name="All Events" />
<notProcessed switchValue="All" name="Unprocessed Category" />
<errors switchValue="All" name="Logging Errors & Warnings">
<listeners>
<add name="Event Log Listener" />
</listeners>
</errors>
</specialSources>
</loggingConfiguration>
<exceptionHandling>
<exceptionPolicies>
<add name="Agility Exception Policy">
<exceptionTypes>
<add name="All Exceptions" type="System.Exception,
mscorlib,
Version=4.0.0.0,
Culture=neutral,
PublicKeyToken=b77a5c561934e089"
```

```

postHandlingAction="NotifyRethrow">
<exceptionHandlers>
<add name="Logging Exception Handler"
type="Microsoft.Practices.EnterpriseLibrary.
ExceptionHandling.Logging.LoggingExceptionHandler,
Microsoft.Practices.EnterpriseLibrary.ExceptionHandling.Logging,
Version=5.0.505.0,
Culture=neutral,
PublicKeyToken=31bf3856ad364e35"
logCategory="General" eventId="100" severity="Error"
title="Total Agility"
formatterType="Microsoft.Practices.EnterpriseLibrary.
ExceptionHandling.TextExceptionHandler,
Microsoft.Practices.EnterpriseLibrary.ExceptionHandling,
Version=5.0.505.0, Culture=neutral,
PublicKeyToken=31bf3856ad364e35" priority="0" />
</exceptionHandlers></add>
</exceptionTypes>
</add>
</exceptionPolicies>
</exceptionHandling>

```

Note SharePoint event handler executes in the context of the user who initiated the action.

For a SharePoint Site

Note If you copy and paste the code from this guide, fix the line breaks.

- Update the <system.serviceModel>:

```

<system.serviceModel>
<bindings>
<basicHttpBinding>
<binding name="BasicHttpBinding_Service" openTimeout="00:10:00"
closeTimeout="00:10:00" sendTimeout="00:10:00" receiveTimeout="00:10:00"
allowCookies="true"
maxBufferSize="2147483647" maxReceivedMessageSize="2147483647"
maxBufferPoolSize="524288">
<readerQuotas maxDepth="2147483647" maxStringContentLength="2147483647"
maxArrayLength="2147483647" maxBytesPerRead="2147483647"
maxNameTableCharCount="2147483647" />
<security mode="TransportCredentialOnly">
<transport clientCredentialType="Windows" />
</security>
</binding>
</basicHttpBinding>
</bindings>
<client>
<endpoint name="CoreIntegrationEventServiceEndpoint"
binding="basicHttpBinding" bindingConfiguration="BasicHttpBinding_Service"
contract="Agility.Server.Core.Model.Interfaces.Services.IIntegrationEventService"
address="http://TotalAgility server name
or IP Address/TotalAgility/Services/Core/IntegrationEventService.svc"/>
</client>
</system.serviceModel>

```

Replace the <IP Address> with the IP Address of the TotalAgility server.

Note Make the endpoint address point to the integration service URL for TotalAgility.

Configure the TotalAgility Integration with SharePoint using SSL

1. On the TotalAgility server, perform the following:
 - a. Add the SharePoint site location and Kofax TotalAgility SharePoint communicator using HTTPS into the Kofax TotalAgility integration module (Home>Integration>SharePoint).
 - b. On Kofax TotalAgility server, open the Web.config file, locate the `BasicHttpBinding_SharePointCommunicatorService` and set the security mode="Transport"
2. On SharePoint server, to enable SharePoint events using HTTPS, perform the following:
 - a. Apply certificate onto SharePoint Server for that particular Sharepoint site.
 - b. For the SharePoint site, open the Web.config file, locate the `BasicHttpBinding_Service` and set the security mode="Transport".

Network authentication for SharePoint and TotalAgility

Configure the network authentication for SharePoint and TotalAgility when they are on the same domain or when they are on different domains.

TotalAgility and SharePoint are on the same domain

1. Ensure that TotalAgility site has Windows Authentication in Internet Information Services (IIS) and the required SharePoint users are added to the TotalAgility server. Perform the following in the TotalAgility server:
 - a. Open **Internet Information Services (IIS) Manager**.
 - b. Click **Sites > Default Web Site > TotalAgility**.
 - c. On the **Features View** tab, double-click **Authentication**.
 - d. Right-click **Windows Authentication** and click **Providers**.
 - e. Check if, **Negotiate** and **NTLM** are available as providers. If not, add them from the **Available Providers** list.
2. Ensure that TotalAgility SharePoint Communicator site has Windows authentication in Internet Information Services (IIS). Perform the following in the SharePoint server:
 - a. Open **Internet Information Services (IIS) Manager**.
 - b. Click **Sites > Default Web Site > TotalAgilitySharePointCommunicator**.
 - c. On the **Features View** tab, double-click **Authentication**.
 - d. Right-click **Windows Authentication** and click **Providers**.
 - e. Check if, **Negotiate** and **NTLM** are available as providers. If not, add them from the **Available Providers** list.
 - f. Ensure that Site App pool is changed to SharePoint site App pool.

TotalAgility and SharePoint are on different domains

Ensure that TotalAgility and SharePoint domains are trusted. If domains are not trusted, Windows authentication will not work, so it must be disabled and Anonymous authentication must be enabled in IIS. The Web.Config files must also be updated.

Perform the following steps in the TotalAgility server and SharePoint server:

1. Open **Internet Information Services (IIS) Manager**.
2. Click **Sites > Default Web Site > TotalAgility**.
For SharePoint server, click **Sites > Default Web Site > TotalAgilitySharePointCommunicator**
3. On the **Features View** tab, double-click **Authentication**.
4. Right-click **Windows Authentication** and click **Disable**.
5. Right-click **Anonymous Authentication** and click **Enable**.
6. Update the Web.config files.
 - a. In the **Web.config** file for TotalAgility, replace `<transport clientCredentialType="Windows" />` with `<transport clientCredentialType="None" />` in the following bindings:
 - BasicHttpBinding_SharepointCommunicatorService
 - BasicHttpBinding_Service
 - CustomBinding_CoreService
 - WebHttpBinding_Service
 - b. In the **Web.config** file for the TotalAgilitySharepointCommunicator site on the SharePoint server, replace `<transport clientCredentialType="Windows" />` with `<transport clientCredentialType="None" />` for `BasicHttpBinding_SharepointCommunicatorService` binding.
 - c. In the **Web.config** file for the SharePoint site (C:\inetpub\wwwroot\wss\VirtualDirectories\<site port>), replace `<transport clientCredentialType="Windows" />` with `<transport clientCredentialType="None" />` for `BasicHttpBinding_SharepointCommunicatorService` binding.

Configure the TotalAgility custom Web pages in SharePoint

Integrate a TotalAgility site directly into SharePoint web interfaces to add the following TotalAgility forms to the SharePoint:

- Create new job/workflow
- Work queue
- Take activities (displaying TotalAgility take activity forms)
- Job/workflow list and job properties

Enable Single Sign-On

Provide single sign-on to access the SharePoint website and the TotalAgility site.

Note Clear the Header Form option while creating the custom pages.

Use the default username initialization variable called "LOGON_USER" in the "top level" forms (CreateNewJob, WorkQueue and JobList) in the TotalAgility site.

Note You can modify the name in the "LOGON_USER" if needed.

When implementing these forms, SharePoint passes the "LOGON_USER" variable into the embedded TotalAgility forms to call the TotalAgility API, `UserService::GetSingleSignOnSession()`.

1. Map form variable, LOGON_USER to `userId`.
2. Provide 7 to `logOnProtocol`.
3. Map global variable, SESSION_ID to `SessionId`.
4. Map global variable, RESOURCE_ID to `ResourceId`.

Using the `GetSingleSignOnSession()` API, you can avoid a separate logon to the TotalAgility forms that are integrated into SharePoint. The `GetSingleSignOnSession()` API gets the TotalAgility session ID for the user if they are already logged on, otherwise it just logs the user.

Note The SharePoint user must also be a user in TotalAgility for single logon to work.

Add links to the "top level" TotalAgility custom web pages in the SharePoint Quick Launch menu.

Add the TotalAgility custom web pages to the SharePoint quick launch menu

1. Go to **Site Actions > Site Settings**.
2. Under Look and Feel category, click **Quick Launch**.
3. Add the following new headings and rename the headings if needed.

| Heading | Web Address |
|-------------------------------|--|
| TotalAgility Workqueue | <p><code>/_layouts/WorkQueue.aspx?EmbeddedForm=WorkQueue.form</code></p> <p>Note Rename <code>WorkQueue.form</code> to point to your TotalAgility work queue form; do not change the name if the form is called <code>WorkQueue.form</code>. If the Quick Launch menu is on a subsite, prefix the subsite name in the link as follows: <code>/SubSiteName/_layouts/WorkQueue.aspx?EmbeddedForm=WorkQueue.form</code></p> |
| TotalAgility Create Workflows | <p><code>/_layouts/CreateJob.aspx?EmbeddedForm=Create%20Jobs.form</code></p> <p>Note Rename <code>Create%20Jobs.form</code> to point to your TotalAgility <code>CreateNewJob</code> form; do not change the name if the form is called <code>Create Jobs.form</code>. You can create multiple TotalAgility Create Workflow headings to point to different TotalAgility <code>CreateNewJob</code> embedded forms. If the Quick Launch menu is on a subsite, prefix the URL with <code>SubSiteName</code> as explained for TotalAgility Workqueue .</p> |

| Heading | Web Address |
|------------------------|--|
| TotalAgility Workflows | /_layouts/JobList.aspx?EmbeddedForm=JobList.form Note Rename JobsList.form to point to your TotalAgility JobList form; do not change the name if the form is called JobList.form. If the Quick Launch menu is on a subsite, prefix the URL with SubSiteName as explained for TotalAgility Workqueue. |

Add the create TotalAgility workflow context menu item to a document library

Provide context menu links in SharePoint document libraries to launch the TotalAgility Create Workflow custom page. Pass in the selected SharePoint document URL as an initialization variable to the new TotalAgility workflow/job so it can be used in Activity forms to provide hyperlinks to the document.

Before you add a new context menu item to a document library, complete the following steps:

1. Create a process with two initialization parameters, DOC_URL and DOC_NAME.
2. Build a Create New Job form and add these initialization parameters, DOC_URL, DOC_NAME and LOGON_USER.
3. Modify the Getinitvarlist action to clear the DOC_URL and DOC_NAME parameters or retain values from the query string.

Then, do the following:

1. Create a text file with the following JavaScript:

```
<script>
function Custom_AddDocLibMenuItems(m, ctx)
{
  // parse the URL out of the itemTable
  var URL = "";
  var DocName = "";
  var index = itemTable.innerHTML.indexOf("href=");
  if (index > 0)
  {
    var str = itemTable.innerHTML.substr(index + 6);
    index = str.indexOf('');
    if (index > 0)
    {
      URL = str.substr(0, index);
      index = str.indexOf('>');
      var index2 = str.indexOf('<');
      DocName = str.substr(index + 1, index2 - index - 1);
    }
  }
  if (URL != "")
  {
    strAction = 'window.location = "http://[domainname]:[Port Number]/[SubSiteName]/_layouts/CreateJob.aspx?DocUrl='
    + URL + '&DocName=' + DocName +
    '&EmbeddedForm=[CreateNewJobFormName.form]";

    var strDisplayText = "Create workflow in TA";
    var strAction;
    var strImagePath = "";

    // Add menu item
```

```

CAMOpt(m, strDisplayText, strAction, strImagePath);

// add a separator to the menu
CAMSep(m);
}
return false;
}
</script>

```

2. Replace the [domainname] text in preceding script with the location of the SharePoint web application that contains the TotalAgility custom web pages.
3. If required, specify the SharePoint subsite name in [SubSiteName].
4. Replace the [CreateNewJobFormName.form] text with the name of your TotalAgility CreateNewJob form.
5. If required, rename the menu item display text "Create workflow in TA" in the script.
6. Upload this file to SharePoint Shared Documents.
7. Provide the link to this file in Content Editor Web Part:
 - a. Go to **Site Actions > Edit page**.
 - b. Click **Add a Web Part**.
 - c. In the **Media and Content** group, select **Content Editor Web Part**.
This mechanism injects JavaScript into the SharePoint page.
8. Save changes to the SharePoint page and exit Edit mode.
A new menu item called "Create Workflow in TA" becomes available from the Context list for a document in this document library. Select the menu item to go to the CreateJob.aspx TotalAgility custom web page (passing in the document URL and name).
9. Add more context menu items to use multiple Create Workflow pages.

Configure the custom web pages

Perform the following steps if you configure the TotalAgility custom web pages in SharePoint.

1. Download a copy of existing Seattle.master from the Master Page gallery and rename it to KTA.master.
2. Open the KTA.master file in the editor.
3. To change the page logo to Kofax, update the LogoImageUrl as follows.

```

LogoImageUrl= <SharePoint:SiteLogoImage CssClass="ms-siteicon-img"
name="onetidHeadbnnr0" id="onetidHeadbnnr2" LogoImageUrl="/_layouts/15/
images/<Image>?rev=23" runat="server">

```

 Replace <image> with the Kofax image name.
4. If using Internet Explorer, update the content attribute value of <meta> tag to "IE=Edge" in the KTA.master file as follows:

```

<meta http-equiv="X-UA-Compatible" content="IE=Edge"/>.

```
5. Upload the new KTA.master in the Master Page gallery as ASP NET Master Page file.
6. Publish the new KTA.master as a major version.
7. Set the new Master Page as Primary master page of your site.
8. Navigate to Site settings > Master Page and select the KTA.master page.
9. Update custom pages to use KTA.master.

Configure TotalAgility Web Parts in SharePoint Server

Configure the SharePoint site that contains TotalAgility web parts to communicate with the TotalAgility sever either using web services or enabling session.

Use the Web Services

1. Open the **Web.config** file.
2. Add the following keys:
 - `<add key="SPPServerName" value="<http or https>://<TA server name><:port>/<TASiteName>"/>`. For example, `<add key="SPPServerName" value="https://DL-WDEML-32:85/TotalAgility">`
 - `<add key="SystemSessionId" value="<TA System Session Id>"/>`. Get the value for the key from System Settings in the Kofax TotalAgility Designer.

Note

- If you do not add the "SPPServerName" key, a message informs you that the Web services communications layer for TotalAgility is not configured. In the key, do not mention the Port if running under port 80.
- If you do not add the "SystemSessionId" key, a message informs you that the System Session Id key is not found.

Enable session

1. Navigate to the `C:\Inetpub\wwwroot\VirtualDirectories\<Port>` folder.

Note Get the <Port> from address bar in Internet Explorer.

2. Open the **Web.config** file and do the following:
 - a. Search for `"<add name="Session">` and uncomment this line.

Note If `add name="Session"` is not available, add the following code: `<add name="Session" type="System.Web.SessionState.SessionStateModule, System.Web, Version=4.0.0.0, Culture=neutral, PublicKeyToken=b03f5f7f11d50a3a" />`

- b. Search for the `"<pages enableSessionState"` tag and change the `"enableSessionState"` attribute value from `"false"` to `"true"`.

Set Up the Microsoft SharePoint Server and Kofax TotalAgility to provide fault tolerance

Set up the TotalAgility server

Install MSMQ support:

1. Open Server Manager on the SharePoint Server.
2. Select to add Message Queuing feature.
3. Select the Message Queuing Server, Directory Service Integration and HTTP Support.

To set up the Kofax TotalAgility server:

1. Create a physical MSMQ queue on the TotalAgility Server:
 - a. Go to **Computer Management\Message Queuing\Private Queues**.
 - b. Create a Transactional private queue called: **TotalAgility/Services/Core/IntegrationEventService.svc**.

Note Select the Transactional check box when creating the queue.

2. Enter the following two commands to configure IIS 7 to enable WAS to listen to the message queue and activate your service when new messages arrive:

```
appcmd set site "Default Web Site" -+bindings.
[protocol='net.msmq',bindingInformation='localhost']
appcmd set app "Default Web Site/TotalAgility" /
enabledProtocols:net.msmq,http
```

3. Open the **Web.config** file located in the TotalAgility\Agility.Server.Web folder in your install location, for example, C:\Program Files\Kofax\TotalAgility\Agility.Server.Web.
4. Add the following msmq binding in the <bindings> section:

```
<netMsmqBinding>
  <binding name="MsmqBindingTransactionalNoSecurity" maxRetryCycles="3"
receiveErrorHandling="Move" receiveRetryCount="3" retryCycleDelay="00:01:00">
  <security mode="None"/>
</binding>
</netMsmqBinding>
```

5. Open the **Web.config** file located in the Core folder in your install location, for example, C:\Program Files\Kofax\TotalAgility\Agility.Server.Web\Services\Core.
6. Locate for <service name="Agility.Server.Core.Services.IntegrationEventService" behaviorConfiguration="Agility.Server.Web.Services.Behavior">
7. Add the following endpoint below this service tag:

```
<endpoint address=
"net.msmq://localhost/private/TotalAgility/Services/Core/
IntegrationEventService.svc"
binding="netMsmqBinding" bindingConfiguration="MsmqBindingTransactionalNoSecurity"
```

```
contract="Agility.Server.Core.Model.Interfaces.Services.IIntegrationEventService" />
```

8. Verify that the Microsoft Windows net.msmq Listener Adapter service is started.

Set up the Microsoft SharePoint server

1. Open the **Web.config** file for a SharePoint site.
2. Add the following tags under <bindings> section:

```
<netMsmqBinding>
  <binding name="MsmqBindingTransactionalNoSecurity" maxRetryCycles="3"
receiveErrorHandler="Move" receiveRetryCount="3" retryCycleDelay="00:30:00">
  <security mode="None"/>
</binding>
</netMsmqBinding>
```

3. Add the following tags under <client> section:

```
<endpoint address=
"net.msmq://<TA_MACHINENAME>/private/TotalAgility/Services/Core/
IntegrationEventService.svc"
behaviorConfiguration="MsmqBindingTransactionalTransportSecurity"
binding="netMsmqBinding"
  bindingConfiguration="MsmqBindingTransactionalNoSecurity"
contract="Agility.Server.Core.Model.Interfaces.Services.IIntegrationEventService"
name="Agility.Server.Core.Services.IntegrationEventService" />
```

4. Remove or comment out the following tag under <appSettings> section:

```
<add key="SPP_EventHandler_WebServiceURL" value="" />
```

5. Replace <TA_MACHINENAME> with the TotalAgility server name.

Chapter 6

Integrate Microsoft Dynamics CRM with TotalAgility

To install Dynamics CRM, the users must have the administrator rights.

See also:

- [Dynamics CRM installation](#)
- [Update the Web configuration file for Dynamics CRM](#)

Dynamics CRM installation

1. Navigate to **\\DynamicsCRMInstallation** on the installation media, and double-click **Setup.exe**. The installation wizard appears.
2. Click **Next**.
3. In the **CRM Server URL** box, replace the <ServerName> with CRM server name and replace Port with the port on which CRM is running.
4. In the **CRM Service URL** box, replace the <ServiceName> with CRM service name.
5. In the **Metadata Service URL** box, replace the <MetaDataServiceName> with CRM metadata service name.
6. In the **Domain** box, enter the domain name.
7. Enter the **Username** and **Password**.
8. Click **Finish**. The installation starts and registers Event Handler in CRM and places necessary files in GAC.

Update the Web configuration file for Dynamics CRM

Add the following script for TotalAgility components to support event handlers:

Note If you copy and paste the code from this guide, fix the line breaks.

```
<configSections>
<section name="exceptionHandling"
type="Microsoft.Practices.EnterpriseLibrary.
ExceptionHandling.Configuration.ExceptionHandlingSettings,
Microsoft.Practices.EnterpriseLibrary.ExceptionHandling,
Version=5.0.505.0,
Culture=neutral,
PublicKeyToken=31bf3856ad364e35" requirePermission="true" />
```

```
<section name="loggingConfiguration"
type="Microsoft.Practices.EnterpriseLibrary.Logging.Configuration.LoggingSettings,
Microsoft.Practices.EnterpriseLibrary.Logging,
Version=5.0.505.0, Culture=neutral,
PublicKeyToken=31bf3856ad364e35" requirePermission="true" />
</configSections>

<loggingConfiguration
name=""
tracingEnabled="true"
defaultCategory="General">
<listeners>
<add name="Event Log Listener"
type="Microsoft.Practices.EnterpriseLibrary.Logging.TraceListeners.
FormattedEventLogTraceListener,
Microsoft.Practices.EnterpriseLibrary.Logging,
Version=5.0.505.0,
Culture=neutral,
PublicKeyToken=31bf3856ad364e35"
listenerDataType="Microsoft.Practices.EnterpriseLibrary.Logging.
Configuration.FormattedEventLogTraceListenerData,
Microsoft.Practices.EnterpriseLibrary.Logging,
Version=5.0.505.0,
Culture=neutral,
PublicKeyToken=31bf3856ad364e35"
source="Total Agility" formatter="Text Formatter"
log="" machineName="." traceOutputOptions="None" />
</listeners>
<formatters>
<add type="Microsoft.Practices.EnterpriseLibrary.Logging.Formatters.TextFormatter,
Microsoft.Practices.EnterpriseLibrary.Logging,
Version=5.0.505.0,
Culture=neutral,
PublicKeyToken=31bf3856ad364e35"
template="Timestamp: {timestamp}{newline}&#xA;Message: {message}
{newline}&#xA;Category: {category}{newline}&#xA;Priority:
{priority}{newline}&#xA;EventId: {eventId}
{newline}&#xA;Severity: {severity}{newline}&#xA;Title:
{title}{newline}&#xA;Machine: {localMachine}
{newline}&#xA;App Domain: {localAppDomain}
{newline}&#xA;ProcessId: {localProcessId}
{newline}&#xA;Process Name: {localProcessName}
{newline}&#xA;Thread Name: {threadName}
{newline}&#xA;Win32 ThreadId:{win32ThreadId}
{newline}&#xA;Extended Properties:
{dictionary({key} - {value}{newline})}"
name="Text Formatter" />
</formatters>
<categorySources>
<add switchValue="All" name="General">
<listeners> <add name="Event Log Listener" />
</listeners>
</add>
</categorySources>
<specialSources>
<allEvents switchValue="All" name="All Events" />
<notProcessed switchValue="All" name="Unprocessed Category" />
<errors switchValue="All" name="Logging Errors & Warnings">
<listeners> <add name="Event Log Listener" />
</listeners>
</errors>
</specialSources>
</loggingConfiguration>
```

```

<exceptionHandling>
<exceptionPolicies>
<add name="Agility Exception Policy">
<exceptionTypes>
<add name="All Exceptions" type="System.Exception, mscorlib,
Version=4.0.0.0,
Culture=neutral,
PublicKeyToken=b77a5c561934e089"
postHandlingAction="NotifyRethrow">
<exceptionHandlers>
<add name="Logging Exception Handler"
type="Microsoft.Practices.EnterpriseLibrary.ExceptionHandling.
Logging.LoggingExceptionHandler,
Microsoft.Practices.EnterpriseLibrary.ExceptionHandling.Logging,
Version=5.0.505.0,
Culture=neutral,
PublicKeyToken=31bf3856ad364e35"
logCategory="General" eventId="100" severity="Error"
title="Total Agility"
formatterType="Microsoft.Practices.EnterpriseLibrary.
ExceptionHandling.TextExceptionFormatter,
Microsoft.Practices.EnterpriseLibrary.ExceptionHandling,
Version=5.0.505.0,
Culture=neutral,
PublicKeyToken=31bf3856ad364e35"
priority="0" />
</exceptionHandlers>
</add>
</exceptionTypes>
</add>
</exceptionPolicies>
</exceptionHandling>

```

Update Web.config for the CRM Virtual Directory

```

<system.serviceModel>
<bindings>
  <basicHttpBinding>
    <binding name="BasicHttpBinding_Service" openTimeout="00:10:00"
closeTimeout="00:10:00"
sendTimeout="00:10:00" receiveTimeout="00:10:00" allowCookies="true"
maxBufferSize="2147483647"
maxReceivedMessageSize="2147483647" maxBufferPoolSize="524288">
      <readerQuotas maxDepth="2147483647" maxStringContentLength="2147483647"
maxArrayLength="2147483647" maxBytesPerRead="2147483647"
maxNameTableCharCount="2147483647" />
      <security mode="TransportCredentialOnly">
        <transport clientCredentialType="Windows" />
      </security>
    </binding>
  </basicHttpBinding>
</bindings>
<client>
  <endpoint name="CoreIntegrationEventServiceEndpoint"
binding="basicHttpBinding" bindingConfiguration="BasicHttpBinding_Service"
contract="Agility.Server.Core.Model.Interfaces.Services.IIntegrationEventService"
address="http://<TotalAgility server name or
IP Address>/TotalAgility/Services/Core/IntegrationEventService.svc"/>
</client>
</system.serviceModel>

```

Note Replace the <TotalAgility server name or IP Address> with the IP Address of the TotalAgility server.

Integrate Microsoft Dynamics AX with TotalAgility

To install Dynamics AX,

- Users created in TotalAgility must have Deployment Administrator rights.
- If a user does not use the *default Deployment Administrator* to install the TotalAgility Dynamics AX integration, the user must meet the following conditions:
 - Be the system administrator in AX.
 - Have full CAL access.

Failure to meet the preceding criteria generates the following error message during installation: "System unable to process request error."

1. Navigate to \\DynamicsAXInstall on the installation media and double-click **Setup.exe**.
The Kofax TotalAgility for Dynamics AX Setup wizard appears.

2. Click **Next**.

The window displays a list of prerequisite software for Dynamics AX.

Note If the required software is not installed, first install the software and then install Dynamics AX. If using Dynamics AX 2009, install .NETFramework 3.5. If using Dynamics AX 2012, install .NETFramework 4.0.

3. Click **Next**.

The Destination window appears.

4. Use the information in the following table to specify file paths in the Destination folder:

| Destination Folder | Sample Path for Dynamics AX 2009 | Sample Path for Dynamics AX 2012 |
|--------------------------------------|---|---|
| DAX website Physical Location | C:\inetpub\wwwroot \MicrosoftDynamicsAXAif50\ | C:\Program Files\Microsoft Dynamics AX\60\AifWebServices |
| DAX website URL | Default Web Site/ MicrosoftDynamicsAXAif50/ | Default Web Site/ MicrosoftDynamicsAXAif60/ |
| DAX Client Physical Location | C:\Program Files\Microsoft Dynamics AX\50\Client\Bin\ | C:\Program Files (x86)\Microsoft Dynamics AX \60\Client\Bin |
| DAX Server Physical Location | C:\Program Files\Microsoft Dynamics AX\50\Server \DynamicsAx1\Bin | Not Applicable |

5. Click **Next**.

The Credentials window appears.

6. Enter your **Username** and **Password** to associate with DAX Application pool.

7. Click Next.

The system displays the installation status and a summary of installation report when installation is complete.

8. Click Finish.

Important If you are using 64 bit operating system and Dynamics AX 2009 32 bit application, enable the Application Pool account associated with the DAX Communicator site. In the IIS Manager, click `Application Pools > DAXAppPool > Advanced Settings` and set `True` for `Enable 32-Bit Applications`.

See also:

- [Create Dynamics AX service reference to the TotalAgility web service](#)
- [Add a reference](#)
- [Copy files manually](#)
- [Import the TotalAgility connector class into Dynamics AX](#)
- [Edit database X++ event methods](#)
- [Verify the Application Pool account](#)

Create Dynamics AX service reference to the TotalAgility web service

As AOT (Application Object Tree) is in the Development Workspace, ensure to deploy the Development Workspace to add in references. Otherwise, you cannot integrate TotalAgility with Dynamics AX. See the following URL for instructions: <http://msdn.microsoft.com/en-us/library/gg846350.aspx>.

Create Dynamics AX 09 service reference to the TotalAgility web service

1. Start Dynamics AX 09.
2. Click **AOT** (Application Object Tree) and press **Ctrl+D**.
3. In the application object tree, Right-click **References** and select **Add service reference**.
4. Complete the **Add service reference** window with the following information:
 - a. WSDL URL: Enter the web URL of the DynamicsAxIntegrationService within the Agility IIS web application, for example, `http://Server/Agility.Server.Web/Services/SDK/DynamicsAxIntegrationService.svc`.
 - b. .NET code namespace: **KtaEventsService**.
 - c. Reference name: **KtaEventsService**.
 - d. Service description: Description of the service reference.
5. Click **OK**.

Create Dynamics AX 12 service reference to the TotalAgility web service

1. Start Dynamics AX 12.
2. Click **AOT** (Application Object Tree) and press **Ctrl+Shift+W**.

3. In the application object tree, right-click **References** and select **Add Reference**.
4. Browse to the TotalAgility assembly, KtaEvents.Services.dll which was installed previously. For example,
C:\Program Files (x86)\Microsoft Dynamics AX\60\Client\Bin
5. Click **OK**.

Add a reference

Add a reference to the Agility.Server.Integration.Common.dll assembly in Dynamics AX.

In Dynamics AX 09

1. Right-click **References** and select **Add reference**.
The assembly browsing form opens.
2. Browse to the **clientbin** directory of the Dynamics AX 09 installation. For example,
C:\Program Files (x86)\Microsoft Dynamics AX\50\Client\Bin
3. Select the **Agility.Server.Integration.Common.dll** assembly and click **OK**.
The newly added assembly appears under references.

In Dynamics AX 12

1. Right-click **References** and select **Add reference**.
2. Browse to the TotalAgility assembly, Agility.Server.Integration.Common.dll, that was installed previously. For example, C:\Program Files (x86)\Microsoft Dynamics AX\60\Client\Bin.
The newly added assembly appears under references.
3. Click **OK**.

Edit the service configuration file for Dynamics AX 12

1. Browse to the **clientbin** directory of the Dynamics AX where the WCF service configurations file, KtaEvents.Services.dll.config was copied by the installer.
2. Edit the endpoint to point to the valid TotalAgility Service for Dynamics AX notifications (...Services/SDK/DynamicsAxIntegrationService.svc).

Copy files manually

To successfully add a Dynamics AX 2012 R2 site in TotalAgility, you must perform the following steps manually:

1. Open Microsoft Dynamics AX 2012 and navigate to Dynamics AX server folder.
2. Copy version 6.2.0 of Microsoft.Dynamics.BusinessConnectorNet.dll and paste it to the bin directory of the DAXCommunicatorService that you install on to the Dynamics AX server.
3. On your TotalAgility release media, navigate to \\TotalAgility\DAXInstallation\Agility.Server.Integration.DynamicsAx.Web\Dax2012R2.

4. Copy Web.config and paste it to the following location on your DAX Server:
<\\Microsoft Dynamics AX\60\AifWebServices\DAXCommunicatorService>
This Web.config tells the service to use the 6.2.0 version of the dll.

Note For DAX 2012 R3, the Web.config file needs updated to use 6.3.0 version of Microsoft.Dynamics.BusinessConnectorNet.dll.

Import the TotalAgility connector class into Dynamics AX

1. In the AOT, click **Import** or press **Ctrl+Shift+I**.
2. Click **Browse** and navigate to the Dynamics AX Setup installation folder (in the Program Files(x86) or Program Files directory). For example,
C:\Program Files\Dynamics AX Setup
3. Select the XPO class, such as Class_KtaController.xpo.
4. Click **OK** to initiate the import or compilation process.

Note Once the class is imported, the Status tab in the compiler output page displays any errors.

Edit database X++ event methods

You can edit the database X++ event methods in the DAX Development Workspace under Classes and Application folders.

1. To alter the Application CUD (create, update and delete) class event methods, call the custom class method EventChangeNotifyKtaWebService when a CUD event has been performed within Dynamics AX.
2. Edit the Application class methods (**InsertLog**, **DeleteLog** & **UpdateLog**) by adding a single line to the appropriate location within each method:
 - **Insertlog method:** new
ktaController().EventChangeNotifyKtaWebService("Create", recordInserted, null, conNull(), recordInserted.RecId);
 - **Deletelog method:** new
ktaController().EventChangeNotifyKtaWebService("Delete", recordDeleted, null, conNull(), recordDeleted.RecId);
 - **Updatelog method:** new
ktaController().EventChangeNotifyKtaWebService("Update", recordOrig, recordUpdated, changedFields, recordUpdated.RecId);

Note The onsite AX Administrator registers the Databaselog events for various AX documents. For example, if the *Customer*, *SalesOrder* and *Purchase Requisition* documents have the Insert, Update and Delete events registered against them, and when one of these events execute for one of these documents, TotalAgility is informed through a WCF call.

Register the database log events

1. Open Microsoft Dynamics AX 2012.
2. In the left hand panel, expand the configure buttons » and select System Administration.
3. In the System Administration page, under Setup, click Database logsetup. Database log window appears.
4. Click **File > New**. Logging Database changes wizard appears where you can add and remove tables and fields from the database log.
5. Click Next. Tables and Fields window appears.
6. Select the Show all tables radio button.
7. In the Tables and Fields window, under General Ledger, select Customers / Vendor Tables as required and click Next.
8. Select the type of change (insert, update, delete, or rename) to register in the database log by selecting the appropriate check box for the table.
9. Click Next. Logging Database changes window appears with the details of the selected tables and fields.
10. Click **Finish**.

Verify the Application Pool account

Verify that the Application pool account is using the correct Business Connector.NET (BC.NET) Windows credentials.

1. On the Start menu, select **All Programs > Accessories > Run**.
2. Enter **inetmgr** and click **OK**.
The IIS Manager appears.
3. Navigate to Application Pool accounts.
4. Select the **DAXKTA** account and verify that the identity is the same as the BC.NET Windows credentials.
5. If the credentials differ, do the following:
 - a. On the Actions panel, click **Advanced Settings**.
 - b. Select the identity and click **Edit**.
6. Click **OK**.
The Application Pool Identity window appears.
7. Click **Set**.
The Set Credentials window appears.
8. Enter the user credentials that are associated with the BC.NET account within Dynamics AX. (The Kofax WCF service uses the BC.NET account to connect to Dynamics AX).
9. Click **OK**.

Integrate Microsoft Outlook with TotalAgility

Integrate Microsoft Outlook 2010 and 2013 with TotalAgility to view, complete, save and cancel various TotalAgility tasks directly from Outlook.

1. Navigate to `\\OutlookInstallation` on the installation media and double-click **Setup.exe**.
The system opens the TotalAgility for Outlook Setup wizard.
2. Click **Next**.
3. Click **Finish**.
4. Click **Install**.
5. Click **Close**.
6. Click **OK** on the confirmation message.

Once Outlook is integrated with TotalAgility, a new TotalAgility menu appears on the Outlook menu bar where you can configure the TotalAgility-related actions.

Note You must associate Outlook with an account. See "Configure Microsoft Outlook settings for TotalAgility" in TotalAgility help. If you do not associate an account with Outlook, the activities are not retrieved and a message is displayed.

Chapter 9

Integrate Micro Focus Content Manager with TotalAgility

This chapter provides the instructions for integrating Micro Focus Content Manager.

Identify the Content Manager SDK Version

These instructions only apply to Content Manager version below 8.

1. Navigate to the **C:\Program Files\Kofax\TotalAgility** folder.
2. Right-click **TrimSDKPIA20.dll** and select **Properties**.
The TrimSDKPIA20.dll properties window appears.
3. On the properties window, select the **Version** tab.
The File Version displays the current TRIM version. For example, 7.3.

Note For TRIM SDK 7.3.0 and later, you will require to enter this number in the <assemblyBinding> section of the Web.config file (see [Set up the Micro Focus Content Manager server](#)).

Set up the Micro Focus Content Manager server

To set up the Content Manager server, install and configure TotalagilitytrimCommunicatorService and then configure the event handler in Content Manager system.

Install and configure TotalAgilityTrimCommunicatorService

To install and work with Content Manager, users must have administrator rights.

1. Log on to the Content Manager server with an account with Local Administrator privilege.
2. Navigate to the `\\ContentManagerInstallation` on the installation media, right click on the executable **Setup.exe** and select **Run as administrator**.
The User Account Control window appears.
3. Click **Yes**.
The installation wizard appears.
4. Click **Next**.
5. Click **Finish**.

6. Configure the **Web.config** file:

- a. In `C:\Program Files\Kofax\TotalAgility\TotalAgilityTrimCommunicatorService`, open the **Web.config** file in the text editor.
- b. Locate the configuration > runtime tag and edit the <assemblyBinding> section as follows:

```
<assemblyBinding>
<assemblyBinding xmlns="urn:schemas-microsoft-com:asm.v1">
<dependentAssembly>
<assemblyIdentity name="TrimSdkPIA20"
publicKeyToken="533fc65e30e543fa" />
<bindingRedirect oldVersion="6.2.2.8614"
newVersion="<latest version>" />
</dependentAssembly>
</assemblyBinding>
```

Replace the <latest version> with the version of **TRIM SDK**. See [Integrate Content Manager with TotalAgility](#).

- c. Edit the <appSettings> as follows:

```
<appSettings>
<add key="TrimDocumentRecordType"
value="DocumentRecordType" />
<add key="TrimFolderRecordType"
value="FolderRecordType" />
<add key="WorkGroupServerName" value="ServerName" />
</appSettings>
```

- Replace the DocumentRecordType with the value taken from the Content Manager server by checking the record type of Document.
- Replace the FolderRecordType with the value taken from the Content Manager server by checking record type of Folder.
- Replace the ServerName with the computer name of the Server.
To identify the computer name of the server, open **Windows Explorer**, right-click **Computer** and click **Properties**. In the Computer name, domain, and workgroup settings group, click **Change Settings**. Copy the computer name.

Important When you first install the TotalAgility Micro Focus Content Manager, a TrimIntegrationAppPool with a local system identity is created. This causes an error if the Content Manager server is remote.

To resolve this error, you must update the TrimIntegrationAppPool identity to account with Administrator permission.

Configure the event handler in Content Manager

Configure TotalAgility events for actions in the Content Manager System.

1. Copy the following DLLs.
 - If using Content Manager version below 8, copy the following DLLs to the TRIM binaries directory (usually c:\Program Files\Hewlett-Packard\HP Records Manager.)
 - **Agility.Server.Integration.Trim.dll**
 - **Agility.Server.Integration.Model.dll**
 - **Agility.Server.Integration.Common**
 - If using Content Manager version 8 and above, copy **Agility.Server.Integration.Trim.dll** to the TRIM directory.
2. For Content Manager to fire events in TotalAgility, register the **Agility.Server.Integration.Trim.dll** file using RegAsm (regasm /codebase Agility.Server.Integration.Trim.dll).
3. To register the dll:
 - a. Open **Content Manager**.
 - b. Select **Tools > Context Administration > External Links**.
The Content Manager Context External Links window appears.
 - c. Click **New Record AddIn**.
The Record AddIn Properties window appears.
 - d. Enter a Link Name.
 - e. In the COM Add-In PROGID box, enter the ProgId, **Agility.Server.Integration.Trim.TrimIntegrationEventHandler**.
 - f. Select **Add-In supports a multi-threaded environment**.
 - g. Click **OK**.
The Content Manager Context External Links window displays the new link.
 - h. Select the link and click **Properties**.
The Record AddIn Properties window appears.
 - i. Click the **Used By** tab.
 - j. Check the Document and File Folder under Record list and click **OK**.
This configures the Event handler on Content Manager.
4. In the Explorer, find **trim.exe.config** file, open it in a text editor and add or replace the following tags:

Note If you cut and paste code from this guide, correct any incorrect line breaks.

```
<?xml version="1.0" encoding="utf-8" ?>
<configuration>
<configSections>
<section name="loggingConfiguration"
type="Microsoft.Practices.EnterpriseLibrary.Logging.Configuration.LoggingSettings,
Microsoft.Practices.EnterpriseLibrary.Logging, Version=5.0.505.0,
Culture=neutral, PublicKeyToken=31bf3856ad364e35" requirePermission="true" />
<section name="exceptionHandling"
type="Microsoft.Practices.EnterpriseLibrary.ExceptionHandling.Configuration.
```

```

ExceptionHandlingSettings,
  Microsoft.Practices.EnterpriseLibrary.ExceptionHandling,
  Version=5.0.505.0, Culture=neutral, PublicKeyToken=31bf3856ad364e35"
  requirePermission="true" />
</configSections>
<exceptionHandling>
<exceptionPolicies>
<add name="Agility Exception Policy">
<exceptionTypes>
<add name="All Exceptions" type="System.Exception, mscorlib, Version=4.0.0.0,
Culture=neutral, PublicKeyToken=b77a5c561934e089"
  postHandlingAction="NotifyRethrow">
<exceptionHandlers>
<add name="Logging Exception Handler" type=
"Microsoft.Practices.EnterpriseLibrary.ExceptionHandling.Logging.LoggingExceptionHandler,
Microsoft.Practices.EnterpriseLibrary.ExceptionHandling.Logging,
  Version=5.0.505.0,
Culture=neutral, PublicKeyToken=31bf3856ad364e35" logCategory="General"
eventId="100" severity="Error" title="Total Agility"
formatterType=
"Microsoft.Practices.EnterpriseLibrary.ExceptionHandling.TextExceptionFormatter,
Microsoft.Practices.EnterpriseLibrary.ExceptionHandling, Version=5.0.505.0,
Culture=neutral, PublicKeyToken=31bf3856ad364e35"priority="0" />
</exceptionHandlers>
</add>
</exceptionTypes>
</add>
</exceptionPolicies>
</exceptionHandling>
<system.serviceModel>
<bindings>
<basicHttpBinding>
<binding name="BasicHttpBinding_Service" openTimeout="00:10:00"
  closeTimeout="00:10:00"
sendTimeout="00:10:00" receiveTimeout="00:10:00" allowCookies="true"
  maxBufferSize="2147483647"
maxReceivedMessageSize="2147483647" maxBufferPoolSize="524288"> <readerQuotas
  maxDepth="2147483647"
maxStringContentLength="2147483647" maxArrayLength="2147483647"
  maxBytesPerRead="2147483647"
maxNameTableCharCount="2147483647" />
<security mode="TransportCredentialOnly">
<transport clientCredentialType="Windows" />
</security>
</binding>
</basicHttpBinding>
</bindings>
<client>
<endpoint name="CoreIntegrationEventServiceEndpoint"
binding="basicHttpBinding" bindingConfiguration="BasicHttpBinding_Service"
contract="Agility.Server.Core.Model.Interfaces.Services.IIntegrationEventService"
address="http://<TotalAgility server name or IP Address>/TotalAgility/Services/
Core/IntegrationEventService.svc"/>
</client>
</system.serviceModel>
</configuration>

```

Replace <TotalAgility server name or IP Address> with the IP Address of the TotalAgility server.

Chapter 10

Integrate Kofax SignDoc with TotalAgility

This chapter provides the instructions for integrating Kofax SignDoc with TotalAgility.

Set up the Kofax SignDoc server

Configure the Kofax SignDoc server to point to the relevant TotalAgility server to allow callback to occur when the signing is completed. The SignDoc server can be configured per SignDoc account to allow the same SignDoc server to callback to multiple TotalAgility servers.

Refer to the section on integration with TotalAgility in SignDoc documentation to know how to set up the SignDoc server to point to the TotalAgility server.

Chapter 11

KCM proxy installation on the Web server

This chapter describes three methods for installing the KCM Proxy Web server:

- [Silent installation](#)
- [Standard installation](#)
- [Docker installation](#)

Ensure that the Microsoft plugin, Web Platform Installer is installed before installing the KCM Proxy Web server. You can install the Microsoft Web Platform from the Microsoft website.

Silent installation

1. On the installation media, navigate to `\\KCMProxyInstallation`.
2. Launch a Command Prompt window and run **Setup.exe** and enter the KCM Server URL in the following format: `http(s)://<CCMServer>:<Portnumber>`.
Provide the IP address and port number of the KCM server. The installer updates the Web.config file with KCM server details and enables the proxy rewrite rules on the web server (IIS).
3. Press **Enter**.
The KCM Proxy is installed in the silent mode.
The system generates a log file on the desktop which reports errors (if any).

Standard installation

1. On the installation media, navigate to `\\KCMProxyInstallation` and double-click **Setup.exe**.
The **KCM Proxy Configuration** window appears.
2. Enter the **KCM Server URL** in the following format: `http(s)://<CCMServer>:<Portnumber>`.
The Web.config file is automatically updated with the KCM Server IP and the Port number.
3. Click **Configure**.
4. Click **OK**.

Docker installation

While generating the "dockersetting.env" file, if the URL is specified in the "KCM Server URL" setting in the Configuration Utility tool, the same URL is used to install KCM Proxy and configure the deployment in the container.

Update the KCM Server URL in TotalAgility Web.config

You can manually update the KCM Server URL in TotalAgility Web.config or run the Configuration tool and update the settings before setting up the integration to KCM.

Manually update the KCM Server URL in TotalAgility Web.config

1. Navigate to the installation directory for the TotalAgility server.
2. In a text editor, open **TotalAgility Web.config** from the following directory:

```
\\TotalAgility\Agility.Server.Web
```

3. Locate the following section:

```
<rewrite>
  <rules>
    <rule name="CCMInteractiveProxy" stopProcessing="true">
      <match url="CCM/Proxy/Interactive/(.*)" />
      <action type="Rewrite" url="{http://ccmserver:port}/ccm/Interactive/
{R:1}" />
    </rule>
    <rule name="CCMDesignerProxy" stopProcessing="true">
      <match url="CCM/Proxy/Repository/(.*)" />
      <action type="Rewrite" url="{http://ccmserver:port}/ccm/Repository/
{R:1}" />
    </rule>
    <rule name="ComposerUIJavascriptProxyRule" stopProcessing="true">
      <match url="CCM/Proxy/ccmcomposerui.js" />
      <action type="Rewrite" url="{http://ccmserver:port}/proxy/
ccmcomposerui.js" />
    </rule>
    <rule name="ComposerUICssProxyRule" stopProcessing="true">
      <match url="CCM/Proxy/ccmcomposerui.css" />
      <action type="Rewrite" url="{http://ccmserver:port}/proxy/
ccmcomposerui.css" />
    </rule>
    <rule name="ComposerUIImgProxyRule" stopProcessing="true">
      <match url="CCM/Proxy/img/(.*)" />
      <action type="Rewrite" url="{http://ccmserver:port}/proxy/img/{R:1}" />
    </rule>
    <rule name="CCMDesignerStaticProxyRule" stopProcessing="true">
      <match url="CCM/Proxy/static/(.*)" />
      <action type="Rewrite" url="{http://ccmserver:port}/ccm/static/
{R:1}" />
    </rule>
    <rule name="ComposerUIFontProxyRule" stopProcessing="true">
      <match url="CCM/Proxy/fonts/(.*)" />
      <action type="Rewrite" url="http://{ccmserver:port}/proxy/fonts/
{R:1}" />
    </rule>
  </rules>
```

4. Replace the `http://<kcmserver>:<port>` with the kcmserver URL.
5. Save and close the configuration file.

Using the Configuration Utility

Run the Configuration Utility and update the configuration settings. See the *Kofax TotalAgility Configuration Utility Guide*. (Navigate to Configuration settings >On-premise >App section).

Install KCM Proxy manually

You can install KCM proxy without using Web platform installer and KCM proxy installer.

1. Install IIS URL Rewrite 2.0.
2. Install Microsoft Application Request Routing 2.5 or higher for IIS.
3. In the IIS Manager, do the following:
 - a. On server level, double-click **Application request routing cache**.
 - b. Click **Server Proxy Settings**.
 - c. Select **Enable Proxy**.
 - d. Click **Apply**.
4. In TotalAgility web.config, find `{http://ccmserver:port}` and replace with `http://servername:port` where `servername` is the host name of the KCM machine and `port` is the port KCM listed as (default 8081). See [Manually update the KCM Server URL in TotalAgility Web.config](#).
5. Uncomment the `<rewrite>` section.
6. Save and close the configuration file.

Chapter 12

Configure HTTPS communication

Configure TotalAgility and Transformation Designer for HTTP communication.

Configure TotalAgility for HTTPS communication

Enable SSL (Secure Sockets Layer) communication for the TotalAgility web layer and Kofax TotalAgility Core Worker to communicate with core services and Transformation Server.

You can enable SSL for TotalAgility at the time of installation. However, if you have not enabled SSL at the time of installation, you can do so post installation by running the Configuration Utility available on the installation media. See the *Kofax TotalAgility Configuration Utility Guide*.

Note Before changing the bindings in the TotalAgility configuration files, ensure that SSL is enabled for TotalAgility in the IIS.

Enable SSL for the TotalAgility application in IIS

1. Open **Internet Information Services (IIS) Manager**.
2. Right-click the **Default Web Site** and click **Edit Bindings**.
3. Click **Add**.
 - a. On the **Type** list, select **https**.
 - b. On the **SSL certificate** list, select the certificate.
 - c. If installing a separate web server, additionally specify the **IP address** of the web server, and **Port** number.
 - d. Click **Ok**.
4. Click TotalAgility and click **SSL settings** on the **Features** tab.
 - a. Select the check box for **Require SSL**.
 - b. **Accept** the Client certificates.
 - c. Click **Apply**.

Update the TotalAgility configuration files

Update the following configuration files:

- Web.config
- Agility.Server.Core.WorkerService.exe.config
- Agility.Server.StreamingService.exe.config

Update Web.config

1. Open **Web.config** located at your installed location. The default location is:

C:\Program Files\Kofax\TotalAgility\Agility.Server.Web

2. In `<servicebehaviors>`, update the `httpsGetEnabled` setting as follows:

```
<serviceBehaviors>
  <behavior name="Agility.Server.Web.Services.Behavior">
    <serviceMetadata httpGetEnabled="false" httpsGetEnabled="true" />
  </serviceBehaviors>
```

3. By default `<security mode="TransportCredentialOnly">`. If using HTTPS mode, update the `<security>` settings as follows:

- If using Windows Authentication, comment out the default Windows authentication section:

```
<!-- HTTPS SSL with Windows logon-->
<security mode="Transport">
  <transport clientCredentialType="Windows"/>
</security>
```

- If logging on manually, uncomment the HTTPS section:

```
<!-- HTTPS SSL with application authentication-->
<security mode="Transport">
  <transport clientCredentialType="None" />
</security>
```

4. Perform the above HTTPS transport authentication for all the bindings:

- BasicHttpBinding_SharepointCommunicatorService
- BasicHttpBinding_TrimCommunicatorService
- BasicHttpBinding_ExchangeNotificationService
- BasicHttpBinding_DynamicsAxCommunicatorService
- BasicHttpBinding_DynamicsAxIntegrationService
- BasicHttpBinding_Service
- CustomBinding_CoreService
- BasicHttpBinding_RemoteLinkedService
- BasicHttpBinding_LicenseServerService
- BasicHttpStreamingBinding_Service
- BasicHttpBinding_DeviceManagerService
- BasicHttpBinding_InsightDataService
- BasicHttpBinding_SigningIntegrationService
- WebHttpBinding_Service
- WebHttpBinding_DeviceManagerService
- WebHttpBinding_SigningIntegrationService

5. The `Secure` attribute for sensitive cookies in HTTPS sessions is not set by default. This allows a browser to send these cookies in plain text over an HTTP session. To secure the cookies, uncomment the `httpCookies` tag.

```
<httpCookies requireSSL="true"/>
```

- To connect TotalAgility to a specific SQL server, ensure that "encrypt=true" for the TotalAgility database connection string.

Note Ensure that SSL is enabled and certificates are installed for the SQL server. See the Microsoft documentation.

If SSL encryption has been turned on globally at the SQL server level using force encryption, you do not need to update the TotalAgility connection strings.

- Save the file.

Update Agility.Server.Core.WorkerService.exe.config

- Open **Core Worker Agility.Server.Core.WorkerService.exe.config** located at your installed location. The default location is:

```
C:\Program Files\Kofax\TotalAgility\CoreWorkerService
```

- Perform the HTTPS transport authentication for all the bindings:

- BasicHttpBinding_Service
- CustomBinding_CoreService
- BasicHttpBinding_SharepointCommunicatorService
- BasicHttpBinding_TrimCommunicatorService

- Save the file.
- Restart the TotalAgility CoreWorker service.

Update Agility.Server.StreamingService.exe.config

- Open the **Agility.Server.StreamingService.exe.config** located at your installed location. The default location is:

```
C:\ProgramFiles\Kofax\TotalAgility\Agility.Server.Web\bin
\Agility.Server.StreamingService.exe.config
```

Note Edit the Agility.Server.StreamingService.exe.config for both the Application and Web server.

- In <servicebehaviors>, update the httpsGetEnabled setting as follows:

```
<serviceBehaviors>
  <behavior name="Agility.Server.Web.Services.Behavior">
    <serviceMetadata httpGetEnabled="false" httpsGetEnabled="true" />
  </serviceBehaviors>
```

- By default, <security mode="TransportCredentialOnly">. If using HTTPS mode, update the <security> settings (for Windows authentication or logging on manually) as follows:

- <!-- HTTPS SSL with Windows logon-->
 <security mode="Transport">
 <transport clientCredentialType="None"/>
 </security>

- Perform the HTTPS transport authentication for all the bindings as follows:

- WebHttpExportBinding_Service**

```
<binding name="WebHttpExportBinding_Service"> transferMode="StreamedResponse">
  <security mode="Transport">
    <transport clientCredentialType="None">
  </transport>
</security>
```

```
</binding>
```

- **WebHttpImportBinding_Service**

```
<binding name="WebHttpImportBinding_Service" transferMode="StreamedRequest">
<security mode="Transport">
  <transport clientCredentialType="None">
</transport>
</security>
</binding>
```

- **BasicHttpStreamingBinding_Service**

```
<binding name="BasicHttpStreamingBinding_Service" transferMode="Streamed"
<security mode="Transport">
  <transport clientCredentialType="None">
</transport>
</security>
</binding>
```

- **BasicHttpBinding_Service**

```
<binding name="BasicHttpBinding_Service">
<security mode="Transport">
  <transport clientCredentialType="Windows" />
</security>
</binding>
```

- **BasicHttpStreamingBinding_CoreService**

```
<binding name="BasicHttpStreamingBinding_CoreService" transferMode="Streamed"
<binding name="BasicHttpStreamingBinding_CoreService" transferMode="Streamed"
<security mode="Transport">
  <transport clientCredentialType="Windows" />
</security>
</binding>
```

Note The streamed transfer mode causes the Microsoft WCF runtime to enforce some restrictions on security. The Windows authentication is not possible with streamed transfer mode. Therefore, we recommend that you use anonymous authentication. However, TotalAgility always validates the session ID before serving a request.

- **CustomBinding_CoreService**

```
<binding name="CustomBinding_CoreService">
<!--
  <httpTransport authenticationScheme="Negotiate" for http with windows
  authentication
  <httpsTransport authenticationScheme="Anonymous" for https with None
  authentication
  -->
  <httpsTransport authenticationScheme="Anonymous" allowCookies="true"
  maxBufferSize="2147483647" maxReceivedMessageSize="2147483647"
  maxBufferPoolSize="524288" />
</binding>
```

5. Change the <baseAddresses> from http to https.
6. Save the file.
7. Restart the TotalAgility Streaming Service to apply the new settings.

Configure the Transformation Designer for HTTPS communication

Update the Kofax Transformation Designer to use SDK SVC accessed via SSL by updating the connection within Kofax Transformation Designer options. For Kofax Transformation Designer, you need to do the following for HTTPS communication:

- Make sure you have installed a certificate that is trusted by the client on the server.
- If the Transformation Designer server is installed on-premise but is not part of a domain, disable Windows Authentication for BasicHttpBinding_Service and WebHttpBinding_Service.
- Specify the URL for Transformation Designer for HTTPS as follows:
 - **For Azure:** `https://<Azure host name>/Services/SDK`
 - **For other configurations:** `https://<host name>/TotalAgility/Services/SDK`

Chapter 13

TotalAgility License Proxy installation

TotalAgility License Proxy enables unconnected Scan Workstations and/or other TotalAgility components to get licensing from the TotalAgility Licence server.

We recommend to install TotalAgility License Proxy on the machine where VRS Elite server is installed. Otherwise, you will need to run the license utility on each workstation and configure the server to point to the proxy machine.

Do not install the Licence Proxy on the same computer as the Licence server (computer running the 'Kofax License Server' service). The Licence Proxy must run on a separate computer, because it needs to route traffic to the licence server. As part of the License Proxy setup, the installer checks the local computer for the TotalAgility License Server, stops the service and sets the startup type to "Disabled".

1. Navigate to `\\TotalAgility > Licensing > Installs` and click **Kofax.Licensing.TotalAgility.Proxy.Installer** on the Installation media.
The Kofax TotalAgility License Proxy Setup window opens.
2. Click **Next**.
3. In the End-User License Agreement window, select **I accept the terms in the License Agreement** and click **Next**.
4. In the Destination Folder window, select the default folder (`C:\Program Files (x86)\Kofax\Kofax TotalAgility License Proxy\`) for the License server or click **Change** to choose another folder.
5. Click **Next**.
6. In the Service Account Setup window, enter the credentials for the user who will run the TotalAgility License Server service:
 - a. In the Username field, enter the user name.
 - b. To specify a domain user, enter the user name in the format `Domain\User`.
 - c. Enter and confirm the Password.

Note This account must have access to TotalAgility.

- d. Click **Next**.

7. In the TotalAgility Connection Setup window:
 - a. Enter the URL of the License Server where the configuration settings reside.
Use the following format: `http://<server_name>/TotalAgility/Services/Core/LicenseServerService.svc` where `<server_name>` is the TotalAgility server name.

Note If using SSL, you must have a trusted, valid certificate.
 - b. Enter the System Session ID.
 - c. Click **Next**
The system downloads the settings.
8. Click **Install** to install the License Server.
9. Click **Finish**.

Modify the TotalAgility license proxy information

You can modify the TotalAgility license proxy information after the installation, in one of the following ways.

- Run the `Kofax.Licensing.TotalAgility.ProxyConfig.exe` typically located at `C:\Program Files (x86)\Kofax\Kofax TotalAgility License Proxy\`. Example: If you regenerate the system session ID in TotalAgility Designer, the same session ID must be reflected in the License Proxy configuration.
- Use command line parameters. Replace the parameters with the following values, if needed.

| Parameter | Value |
|------------|---|
| /URL | TotalAgility URL |
| /sessionId | System Session ID for the specified user. |
| /retrySpan | Length of time to retry connections to Kofax TotalAgility. Format is that accepted by <code>TimeSpan.Parse</code> , for instance "00:00:30" represents the default of 30 seconds. |
| /silent | Enables silent mode for configuration utility. User Interface does not appear. |

For example, `Kofax.Licensing.TotalAgility.TenantProxyConfig /url https://tenantSpecific /sessionId {66FFD7D5-F618-4BEE-903A-54C151671BC8} /retrySpan:00:05:00`.

Note When you run the command with any invalid parameters an error message is sent to the standard error file.

Chapter 14

Configure VRS Elite for TotalAgility

Install Kofax VRS and configure the VRS license server. Refer to the *Kofax VRS Elite Installation Guide* for more details.

Kofax VRS Basic or Professional OEM installations

If your scanner includes an OEM version of VRS Basic or Professional, install VRS by running **setup.exe** on the scan station. The VRS software is automatically activated based on the attached scanner model.

Standalone installations

If you purchased a standalone VRS license, install VRS by running **setup.exe** and select **Standalone** as the setup type. When prompted, specify the part number (such as VP-P005-0001), product code, and serial number to activate the software.

Note VRS remains activated on the workstation unless you manually deactivate it.

Kofax VRS Elite licensing managed by the Kofax TotalAgility License Server

Use this configuration to manage VRS licenses through the TotalAgility License Server while also enabling VRS Elite shared profiles and auto profile training data.

This configuration requires installation of the VRS Elite 5.1.2 or higher.

Install VRS Server

1. Run **setup.exe** from the VRS Elite installation media.
2. When prompted, select **Server** as the setup type.
3. Confirm the KTA license server information.

Note If the VRS Server does not have a direct connection to the Kofax TotalAgility license server, you need to install a license proxy.

4. Use the generated deployment Kofax VRS.msi to install VRS on the scan stations. Refer to the *Kofax VRS Elite Installation Guide* for details.

Use Kofax VRS Elite with the TotalAgility Scan Client

After you install VRS Elite, Kofax Software VRS - TWAIN appears in the list of scanners when you scan a document in TotalAgility. See the *Kofax TotalAgility Scan Client help* for more information.

Chapter 15

Kofax Web Capture Service installation

Install the Kofax Web Capture Service either at the default location or to a custom location.

Install at the default location

1. When opening a scan-enabled form for the first time, a prompt appears asking you to install the new Web Capture Service. See *Build a Scan Create New Job form in TotalAgility Help*.
2. Click **Run**.
3. Select **Save As** if you want to keep a copy of the msi installer. The msi installer can be used for Enterprise central deployment scenarios.
4. Refresh the page once installation completes.
5. The View and Change Settings icon  on the Scan Create New Job form becomes available after page refresh.
6. The Kofax Web Capture Service icon  in the System Tray icons indicates if the service is running.

Install at custom location

For enterprise deployment scenarios where a custom Web Capture service installation location is required, install Web Capture service as follows.

On the Command Prompt, type the following command:

```
msiexec /i Kofax.WebCapture.Installer.msi INSTALLFOLDER=<Installation Folder>
```

Use the Web Capture Service on multiuser environment

You can use the Web Capture Service on multiuser environments, such as MS Terminal Server and Citrix. Multiple users can work with Web Capture Service at the same time from different Windows logon sessions.

Use the Web Capture Service on MS Terminal Server

When using a Terminal Server, users can connect to the scan server simultaneously and perform scanning tasks or import files in parallel. The Web Capture Service Host determines who exactly has made the request and forwards the request to the appropriate Web Capture Service Worker. The Web Capture Service Worker then works with devices and files that are available to the specific user.

Note The Web Capture Service can only work with scanners attached to a remote Terminal Server; it cannot work with locally connected scanners.

Similarly, for file import, the Web Capture Service provides access to files on a Terminal Server.

Use the Web Capture Service on Citrix

When both the Browser app and Web Capture Service are installed on the Citrix Server, the Web Capture Service physically runs on a remote Citrix server, while a scanner is connected to the client user's computer. This works transparently for Web Capture Service when Citrix TWAIN Redirection is enabled.

Note The number of simultaneously active user sessions for one Citrix Server is limited to 50 sessions.

Install the Web Capture Service as Windows Service

To deploy and upgrade the Web Capture Service installed as Windows Service, you must have Administrator rights.

To install the Web Capture Service as a Windows Service, enable the multiuser support features by using the `INSTALLSERVICE` command line option as follows:

```
msiexec /I Kofax.WebCapture.Installer.msi INSTALLSERVICE=1
```

The MSI installation package is available in the TotalAgility installation folder at:

```
\\TotalAgility\TotalAgilityInstall\Agility.Server.Web\Forms\Controls\Capture  
\external\webcapture
```

Upgrade the Web Capture Service

To upgrade the Web Capture Service installed as Windows Service, use the same command line parameter that you used for installing the Web Capture Service.

Note You cannot upgrade the Web Capture Service installed as a Windows Service to the standalone version. If you try to do so, the following message appears: This application cannot be installed because you already have Web Capture Service installed as Windows service.

However, you can upgrade from the standalone installation to Windows.

Chapter 16

Scan Agent Service installation

The Scan Agent Service is offered through lightweight local agents that can be deployed through an msi file included in the TotalAgility installation media.

You must have sufficient privileges to install system services, otherwise the Scan Agent Service (ScanAgentService) cannot be installed.

Service account to use for Scan Agent Service:

If TotalAgility is configured to use Windows authentication then Active Directory account must be specified that can authenticate within TotalAgility. Otherwise, the LocalSystem account can be used.

As Scan Agent Service needs access to user profile specific folders (to access scanned images) then service account that is used for Scan Agent Service must have access to different user profiles. This means that this account must have administrative privileges. For example, when Scan Agent Service is installed on terminal server and/or different users (scan operators) use the same computer.

If Scan Agent Service is going to be deployed to end user computer then you may not require administrator privileges. For example, if Scan Agent Service is going to upload images only for a particular user then you can install Scan Agent Service under this user account.

Standard installation

1. On the installation media, navigate to `\\ScanAgentService`.
2. Double-click **Kofax.TotalAgility.ScanAgentService.Installer.msi**.
The Kofax TotalAgility Scan Agent Service Setup wizard starts.
3. Click **Next**.
4. In the **End-user License Agreement** window, select **I accept the terms in the License Agreement**.
5. Click **Next**.
6. In the **Destination Folder** window, either accept the default location where the Scan Agent Service must be installed, or click **Change** to choose another folder.
7. Click **Next**.
8. In the **Service account setup** window, specify the logon account (Windows account) for the Kofax TotalAgility Scan Agent service.
9. Click **Next**.
10. Click **Install** to begin installation.
Once installed, a local service, "Kofax TotalAgility Scan Agent Service", is created on the workstation. A companion "Scan Agent Monitor" is available, which can be used to monitor job upload status.

Scanning with Scan Agent Service

The status bar of the Scan Create New Job form indicates if the session is connected to Scan Agent Service.

The Scan Create New Job form offloads actual upload of images to Scan Agent Service. However if image enhancement is enabled, the Scan Create New Job form performs image processing in a regular way.

Once image processing operation (if any) is done, the "Create Job" button becomes available, even if images have not been completely uploaded to the server. When you click "Create Job", the job appears in the Scan Agent Monitor.

The Scan Agent Monitor can be used to monitor job upload status. The job upload statuses include:

- **Pending:** Job is being prepared for upload.
- **In Progress:** Job is currently being uploaded.
- **Finished:** Job has successfully being uploaded.
- **Error:** Job encountered an error and has been stopped.
- **Paused:** Job has been paused.

Depending on the job status, the following actions are available.

- **Abort:** Aborts and cancels the corresponding job, and prompts you for a TotalAgility user account to cancel the job with.

Note This action uses a separate TotalAgility user session; if "Allow Multiple Logon" is not enabled, the abort action ends any other session using the same user account.

- **Pause:** Pauses the upload session for the job. You must explicitly resume a paused job.
- **Retry:** Queues uploading job again if the job encounters an error. This action helps in recovering from an upload error.
- **Resume:** Resumes a paused job.
- **Clear Completed:** Removes all uploaded complete jobs from the list.

Chapter 17

Launch TotalAgility

1. Enter `http://[TA server hostname or IP]/TotalAgility/Designer/default.htm` URL in the browser.
2. Enter the login credentials used during installation.
TotalAgility Designer is launched in the browser.
3. Alternatively, click **Start > All Programs > Kofax TotalAgility > Designer**.

Launch TotalAgility Workspace

1. Enter `http://[TA server hostname or IP]/TotalAgility/Forms/Custom/Logon.html` URL in the browser.
2. Enter the login credentials used during installation.
TotalAgility Workspace launches in the browser.
3. Alternatively, click **Start > All Programs > TotalAgility > Workspace**.

Guidance notes on logon

You can configure a single Kofax TotalAgility web installation using either of the following as these configurations are mutually exclusive:

- Windows Authentication
- Manual Logon

For example, if an organization requires "manual logon" for external users and "Windows authentication" for internal users, you cannot achieve this with a single web installation. You need two separate web sites, one to use Windows authentication and the other to use Manual logon. You can use the following options to achieve this configuration.

- Two separate web servers where one web server will have a Kofax TotalAgility web installation using Windows authentication, and another web server will have a Kofax TotalAgility web installation using manual logon (preferred). You can upgrade the servers as they are installed using the Kofax TotalAgility installation program (by the Kofax TotalAgility installation / upgrade program).
- Single web server containing two TotalAgility web sites, where one website is configured to use manual logon and another website configured to use Windows authentication. The administrator setting up this server will install Kofax TotalAgility web installation and then clone the virtual directory.

Note You can upgrade the original Kofax TotalAgility web installation, but not the cloned virtual directory.

Repair the TotalAgility installation

Repairing TotalAgility will only repair the application and not the database.

To repair any TotalAgility product components that are installed incorrectly:

1. Click **Start > All Programs > Kofax TotalAgility** and select **Uninstall or Repair**.
The **Repair/Uninstall** window opens.
2. Click **Repair** and click **Next**.
The **Components To Repair** window opens and lists all the components you can repair.
3. Select the components to repair.
4. Click **Browse** and select the installation files.
5. Click **Next**.
The **Credentials** window opens.
6. Enter the **Password** or select the **Run as System Account** check box to choose the system credentials.
7. Click **Next**.
The **Repair Progress** window opens. When the repair is complete, the **Repair Complete** window opens. The summary report lists the components, servers, applications and services repaired.
8. Click **Finish**.

Uninstall TotalAgility

Uninstalling TotalAgility only removes the application and not the databases.

Use the installation wizard

1. Click **Start > All Programs > Kofax TotalAgility** and select **Uninstall or Repair Kofax TotalAgility**. The **Repair/Uninstall** window opens.
2. Select **Uninstall** and click **Next**.
3. Follow the prompts until you are informed that the product is uninstalled, and then click **Finish**. The summary report lists the components, servers, applications and services uninstalled. If any errors occur during uninstallation, you can view them in the TotalAgility log file called Kofax TotalAgilityInstallationErrorLog.txt on your desktop. This log file contains information about any errors.

Use the silent mode

1. On the Command Prompt, change the command line to the root directory of the Setup.exe file.
2. Run `Setup.exe /Silent /U`.
The system uninstalls TotalAgility and automatically creates a log file on your desktop. This log file contains information on errors, if any. The removal of the product is indicated in the event log.

Note Uninstalling TotalAgility in silent mode not only removes the applied fix pack or service pack but also removes the Kofax TotalAgility application completely. To reinstall TotalAgility, you must install its base version and then apply any patches.

Chapter 20

Upgrade process

You can upgrade TotalAgility from 7.0.2, 7.1.0, 7.2.0 (or any interim patches), 7.3.0 (or any interim patches), 7.4.0 (or any interim patches), 7.5.0 (or any interim patches), 7.6.0 (or any interim patches) to 7.7.0.

You can choose to upgrade [TotalAgility components](#) and [databases](#) independent of each other or upgrade [TotalAgility components including databases](#). You can also upgrade databases manually.

Note Before upgrading TotalAgility, ensure TotalAgility App Pool and all the TotalAgility Services are stopped, and the databases are backed up.

On upgrade, the TotalAgility installer restores the following configuration settings:

- All existing AppSettings
- All existing Security Bindings
- All HTTP URL Rewrites to be done for TotalAgility 7.7.0.

Once upgrade is complete, you must start the TotalAgility Services.

Upgrade TotalAgility components

To upgrade TotalAgility components such as License Proxy, Transformation Designer and Transformation Server, perform the following steps.

1. Navigate to TotalAgility Installation media and double-click **Setup.exe**.
The User Account control window opens.
2. Click **Next**.
3. In the Kofax TotalAgility Upgrade window, select **TotalAgility components** and click **Next**.
The Credentials window opens.
4. Enter the credentials (password and confirm password) and click **Next**.
The Installation Review window opens and displays the settings.
5. Enter the credentials (password and confirm password) and click **Next**.
The Installation Progress window opens. The setup installs the required components.

6. Click **Finish** to complete the installation.

If any errors occur during upgrade, TotalAgility creates a log file called **Kofax TotalAgilityInstallErrorLog.txt** on your desktop. Fix the errors.

After upgrading TotalAgility components, if you want to upgrade databases, do the following:

- a. Navigate to TotalAgility Installation media and double-click **Setup.exe**.
The Repair/Uninstall/Upgrade Databases window opens.

Note Alternatively, you can select the Upgrade Databases option from the Repair/Uninstall/Upgrade Databases window by clicking Start > All Programs > Kofax TotalAgility and select Uninstall or Repair Kofax TotalAgility.

- b. Select **Upgrade Databases**.
- c. To Import the Workspace package, select the **Import system Workspace package** check box.
- d. Click **Next** and follow the instructions.

Upgrade TotalAgility databases

1. Navigate to TotalAgility Installation media and double-click **Setup.exe**.
The User Account control window opens.
2. Click **Next**.
3. In the Kofax TotalAgility Upgrade window, select **TotalAgility databases** and click **Next**.
The Credentials window opens.
4. Enter the credentials (password and confirm password) and click **Next**.
The Installation Review window opens and displays the settings.
5. Enter the credentials (password and confirm password) and click **Next**.
The Installation Progress window opens. The setup installs the required components.
6. Click **Finish** to complete the installation.

If any errors occur during upgrade, TotalAgility creates a log file called **Kofax TotalAgilityInstallErrorLog.txt** on your desktop. Fix the errors.

If any database script errors occur, TotalAgility creates a log file called **CEBPMDatabaseErrorLog.txt** on your desktop. Fix the errors and run **Agility.server.upgrade.exe**.

After upgrading databases, if you want to upgrade TotalAgility components, do the following:

- a. Navigate to TotalAgility Installation media and double-click **Setup.exe**.
The User Account control window opens.
- b. Click **Next**.
The Kofax TotalAgility Upgrade window opens.
- c. To manually start the services after the installation is complete, clear the **Automatically start services** check box. By default, the system starts the services automatically.
- d. To Import the Workspace package, select the **Import system Workspace package** check box.
- e. Click **Next** and follow the instructions.

Upgrade Kofax TotalAgility components including databases

1. Navigate to TotalAgility Installation media and double-click **Setup.exe**.
The User Account control window opens.
2. Click **Next**.
3. In the Kofax TotalAgility Upgrade window, select **Upgrade Kofax TotalAgility components including databases** and click **Next**.
The Credentials window opens.
4. Enter the credentials (password and confirm password) and click **Next**.
The Installation Review window opens and displays the settings.
5. Enter the credentials (password and confirm password) and click **Next**.
The Installation Progress window opens. The setup installs the required components.
6. Click **Finish** to complete the installation.
If any errors occur during upgrade, TotalAgility creates a log file called **Kofax TotalAgilityInstallErrorLog.txt** on your desktop. Fix the errors.
If any database script errors occur, TotalAgility creates a log file called **CEBPMDatabaseErrorLog.txt** on your desktop. Fix the errors and run **Agility.server.upgrade.exe**.

Upgrade databases manually

Before upgrading TotalAgility, ensure TotalAgility App Pool and all the TotalAgility Services are stopped, and the databases are backed up.

To run scripts manually, do the following:

1. Go to `\\TotalAgility\TotalAgilityInstall\DatabaseScripts\SQL Server\Upgrade Database Scripts`.

2. Run the conversion scripts (if exist) for all releases and patches starting from the version upgrading from to the version being upgraded to.

Example: If upgrading from 7.2.0.0 to 7.7.0, run the following conversion scripts.

- 7.2.0.0 to 7.2.1.0 Conversion Scripts
- 7.2.1.0 to 7.2.2.1 Conversion Scripts
- 7.2.2.1 to 7.3.0.0 Conversion Scripts
- 7.3.0.0 to 7.3.0.2 Conversion Scripts
- 7.3.0.2 to 7.3.1.0 Conversion Scripts
- 7.3.1.0 to 7.3.1.2 Conversion Scripts
- 7.3.1.2 to 7.4.0.0 Conversion Scripts
- 7.4.0.0 to 7.4.0.1 Conversion Scripts
- 7.4.0.1 to 7.4.1.0 Conversion Scripts
- 7.4.1.0 to 7.4.1.1 Conversion Scripts
- 7.4.1.1 to 7.5.0.0 Conversion Scripts
- 7.5.0.0 to 7.5.0.5 Conversion Scripts
- 7.5.0.5 to 7.5.0.10 Conversion Scripts
- 7.5.0.10 to 7.6.0.0 Conversion Scripts
- 7.6.0.0 to 7.7.0.0 Conversion Scripts

Run the scripts in the following order across databases and follow the instructions inside each script.

- a. Convert_Main.sql on the TotalAgility database.
- b. Convert_Audit.sql on the Audit database.
- c. Convert_Archive.sql on the Finished Jobs database.

Note If Audit and Archive databases are maintained with the same name as the TotalAgility database, then run the Convert_Audit.sql and Convert_Archive.sql scripts on the TotalAgility database.

- d. Convert_Forms.sql on the TotalAgility database.
- e. Convert_KLS_OnPremise.sql on the TotalAgility database.
- f. Convert_Simulator.sql on the TotalAgility_Simulator database.
- g. Convert_PI.sql on the PI database. Run this script only if the PI database was already setup in earlier install, otherwise do not run this script.
- h. Convert_DataLayer.sql on the TotalAgility_Documents database.
- i. Run the following conversion scripts for the Reporting databases:
 - KofaxReportingAnalytics.SQL_Convert.sql on the TotalAgility_Reporting database.
 - KofaxReportingAnalytics.Staging.SQL_Convert.sql on the TotalAgility_Reporting_Staging database.

If the previous version of TotalAgility, such as TotalAgility 7.0.2 did not include reporting databases, you must first create the TotalAgility_Reporting database and the TotalAgility_Reporting Staging database and update the Web.config file accordingly.

3. Navigate to `\\TotalAgility\Agility.Server.Web\bin>` and open **Agility.Installation.Server.Upgrade.exe.config**.
4. In the `<appSettings>` section of `Agility.Installation.Server.Upgrade.exe.config`, update the value for the following settings.
 - a. `<add key="UpgradeFromVersion" value="" />` where the value is the TotalAgility version from which you want to perform an upgrade. For example, if you are upgrading TotalAgility from 7.6.0 to 7.7.0, set the value as follows: `<key="UpgradeFromVersion" value="7.6.0"/>` .
 - b. `<add key="SystemSessionId" value="" />`. Take the system session ID from the TotalAgility Designer or from the database.
 - c. `<add key="UserName" value="" />` where the user name is the currently logged on user's name.
5. From the command prompt, run `Agility.Installation.Server.Upgrade.exe`.

It is preferable to run this utility from the installed location. However, this utility can be triggered from the extracted build location or any custom folder. All the Agility DLLs must be copied into the folder where this utility resides.

If the utility is executed from the installed location, connection strings are updated by the install program. However, if it is executed from the custom location, you must update the connection strings explicitly and make a note of it.

The `Agility.Installation.Server.Upgrade.exe` utility performs a list of actions on the TotalAgility data as well as schema. These actions include:

 - Updating design time type for non-custom nodes
 - Updating design time type for custom nodes
 - Updating server setting Scan profiles
 - Updating device capture form controls with field name
 - Updating form controls to new versions
 - Updating capture form actions
 - Updating form title String ID for upgrade
 - Updating capture control "Rotate pages" action
 - Updating "Fuzzy search" action
6. You can optionally import the Workspace package by passing the `Agility.Installation.Server.Upgrade.exe <ImportWorkspacepackage>` as a parameter, such as `Agility.Installation.Server.Upgrade.exe true`. If you do not want to import the Workspace package, pass the `Agility.Installation.Server.Upgrade.exe false` as a parameter.
7. Ensure that no error log is created. If any errors occur, a log file called **KofaxUpgradeDatabaseUtilityError.txt** is created on your desktop. Restore the database, fix those errors and repeat the above steps.
8. Start the Kofax TotalAgility services manually:
 - a. At Run, type **Services.msc** and press **Enter**.
 - b. Right-click **Kofax TotalAgility Core Worker** and click **Start**.
 - c. Similarly, start other services.

Upgrade reporting databases 2.0.2

Run the following scripts to upgrade the Reporting databases 2.0.2 manually:

1. Run the script from `TotalAgilityInstall\DatabaseScripts\SQL Server\Upgrade Database Scripts \ 7.0.2 -> 7.1.0`.
2. Run the script from `TotalAgilityInstall\DatabaseScripts\SQL Server\Upgrade Database Scripts\ 7.1.0 -> 7.2.0`.
3. Run the script from `TotalAgilityInstall\DatabaseScripts\SQL Server\Upgrade Database Scripts\ 7.2.0 -> 7.3.0`.
4. Run the script from `TotalAgilityInstall\DatabaseScripts\SQL Server\Upgrade Database Scripts\ 7.3.0 -> 7.4.0`.
5. Run the script from `TotalAgilityInstall\DatabaseScripts\SQL Server\Upgrade Database Scripts\ 7.4.0 -> 7.5.0`.
6. Run the script from `TotalAgilityInstall\DatabaseScripts\SQL Server\Upgrade Database Scripts\ 7.5.0 -> 7.6.0`.
7. Run the script from `TotalAgilityInstall\DatabaseScripts\SQL Server\Upgrade Database Scripts\ 7.6.0 -> 7.7.0`.

Note If you are upgrading from TotalAgility 7.1.0 to 7.7.0 (with Reporting as a part of TotalAgility 7.7.0), ensure that all the Reporting Staging database tables are empty before performing any automatic or manual upgrade.

Upgrade TotalAgility in silent mode

See [Upgrade TotalAgility in silent mode](#).

Chapter 21

Troubleshooting

This section describes the issues you may encounter and their resolution.

Installation failure in IPv4 and IPv6 environment

If SQL server is configured to listen only on IPv6 addresses on a dual-stack (IPV46), client connection attempts using IPv4 address will fail and it may take longer than default timeout, contributed by default TCP timeout logic during connection establishment handshakes. Even though the subsequent IPv6 connection can succeed immediately, the connection may still fail.

To resolve this issue, disable IPv4 in SQL Server Configuration Manager.

1. Start **SQL Server Configuration Manager**.
2. Open the **Properties** for the TotalAgility server instance TCP/IP protocol.
3. Set **Listen All** to **No**.

Note This setting allows fine control over which interfaces the TASServerSQLInstance will listen for connections.

4. Click the **IP Address** tab.
5. Set **Enabled** to **No** for all entries except for ::1 which is the IPv6 local host address.
6. Select **OK** to commit changes and **OK** at the service restart dialog.
7. Restart the SQL Server (<TASServerInstance>) service where TASServerInstance is the actual instance used by TotalAgility (for example, Kofax TotalAgility).

TotalAgilityAppPool exists

TotalAgility creates an application pool called TotalAgilityAppPool. Ensure you do not have an existing application pool of the same name as it may cause issues when installing or upgrading.

Images not displayed in Workspace after scanning

No images are displayed on Workspace after scanning if you log into machine as non-admin user. The images display normally if you login as admin user.

1. If you have not installed DosadiLog, the diagnostic logging tool for the WebCapture plugin, please do so now. See the instructions and download link at: <http://www.eztwain.com/dosadilog.htm>.

2. Edit the <system.diagnostics> section of the Web.config file as follows:

Note If you copy and paste the code from this guide, fix the line breaks.

```
<system.diagnostics>
<!--<sources>
<source name="System.ServiceModel"
switchValue="Information, ActivityTracing"
propagateActivity="true">
<listeners>
<add name="traceListener"
type="System.Diagnostics.XmlWriterTraceListener"
initializeData= "c:\log\Traces.svclog" /> </listeners> </source> </sources>-->
<trace autoflush="true">
<listeners> <add name="ThinClientServer" traceOutputOptions="DateTime,ThreadId"
type="System.Diagnostics.TextWriterTraceListener" initializeData="c:
\ThinClientServerLog.txt">
<filter type="System.Diagnostics.EventTypeFilter" initializeData="Verbose" /> </
add>
<!--<add type="Microsoft.WindowsAzure.Diagnostics.DiagnosticMonitorTraceListener,
Microsoft.WindowsAzure.Diagnostics, Version=1.0.0.0, Culture=neutral,
PublicKeyToken=31bf3856ad364e35"
name="AzureDiagnostics">
<filter type="" />
</add>-->
</listeners>
</trace>
</system.diagnostics>
```

3. To ensure that non-admin users are able to log in, add the link to Trusted Sites:
 - a. Go to **Internet Options** in IE 11.
 - b. Click the **Security** tab.
 - c. Click **Sites**.
 - d. Add the domain to the trusted sites, for example, `http://<domain>`.

Exception during Transformation Designer projects import

An exception is thrown while importing projects using Transformation Designer that connects to a TotalAgility web service that uses SSL.

1. If you select to run your server using SSL, make sure the **Client certificates** option is set to **Ignore** under SSL Settings.

2. If you want to use Client certificates for authentication (Accept or Require), you must set the value for `uploadReadAheadSize` in IIS. Use either option to adjust this setting:

- In the IIS Manger:
 - a. Open the Configuration Editor of the TotalAgility site.
 - b. In the Section list, expand `system.webServer` and select `serverRuntime`.
 - c. In the From list, select **ApplicationHost.config <location path='Default Web Site/TotalAgility'/>**.
 - d. Set an appropriate value in bytes for `uploadReadAheadSize`.

| Deepest Path: MACHINE/WEBROOT/APPHOST/Default Web Site/TotalAgility | |
|---|----------------------|
| <code>alternateHostName</code> | |
| <code>appConcurrentRequestLimit</code> | 5000 |
| <code>authenticatedUserOverride</code> | UseAuthenticatedUser |
| <code>enabled</code> | True |
| <code>enableNagling</code> | False |
| <code>frequentHitThreshold</code> | 2 |
| <code>frequentHitTimePeriod</code> | 00:00:10 |
| <code>maxRequestEntityAllowed</code> | 4294967295 |
| <code>uploadReadAheadSize</code> | 48000 |

- Or, modify the IIS main config file:
 - a. Open the **applicationHost.config** file located under `C:\Windows\System32\inetsrv\config\`.
 - b. If the `<serverRuntime>` node does not exist yet, add it below the `<security>` node within `<system.webServer>`.

```
<location path="Default Web Site">
  <system.webServer>
    <security>
...
    </security>
    <serverRuntime uploadReadAheadSize="10485760" />
  </system.webServer>
</location>
```

- c. Set an appropriate value in bytes for `uploadReadAheadSize`.

Download software updates

When downloading an installation package or a service pack from `ftp.kofax.com` site, please ensure this site is added as a trusted site, otherwise the downloaded file may get corrupted.

Search feature not working in TotalAgility help

- The TotalAgility Help Search functionality does not work when Designer is run from **Start > All Programs**.

To resolve this issue, add the site as a trusted site in Internet Explorer: **Internet Options > Security > Trusted Sites > Sites**

- The TotalAgility Help Search functionality does not work in Designer and Workspace for Internet Explorer 9.

To resolve this issue, navigate to **Tools > Compatibility Settings** in Internet Explorer 9 and clear the following two options:

- Include updated website lists from the Microsoft
- Display intranet sites in Compatibility View

Site location invalid error

SharePoint security issues can occur when the TotalAgilitySharePointCommunicator web service hosted in IIS does not have permission to access the SharePoint site in IIS. This can cause a "Site location is invalid" error when integrating TotalAgility with SharePoint.

To resolve this issue:

1. Ensure the TotalAgilitySharePointCommunicator web service is running under the same application pool as your SharePoint site. Depending on the security trust level within SharePoint, TotalAgility can cause communication failures between TotalAgilitySharePointCommunicator and SharePoint due to permissions.
2. Turn off ASP impersonation on the TotalAgilitySharePointCommunicator web service in IIS (if enabled); ASP impersonation is not supported by the SharePoint application pool and may cause permission issues with remote SharePoint and TotalAgility servers.

(405) Method not allowed error

While Installing TotalAgility, the error "(405) Method Not Allowed" may occur.

To resolve the issue, re-register ASP.NET 4.x for IIS.

1. Open the command prompt.
2. Navigate to %WINDIR%\Microsoft.NET\Framework\v4.0.30319 .
3. Execute `aspnet_regiis.exe-i`.

MimeType error

When trying to access the Tenant Management or TotalAgility websites from the IIS, and the web page does not render with the following error: Cannot add duplicate collection entry of type

mimeMap with unique attribute field Extension set to .xap; this means there are conflicting mime types in two different configuration files (for example, one at the application level and the other at the site level).

To resolve this issue, do either of the following:

1. Remove one of the two conflicting mimeMap extensions from the configuration files.
2. If the IIS Administrator needs both the conflicting mime mappings, add the remove tag above the conflicting mimemap.

Example If your application has the following mimemap in the application level configuration file:

`<mimemap fileExtension=".xap" mimeType="application/octet-stream" />` (for example, located at `//inetpub/wwwroot/web.config`); if this mimemap creates a conflict with the same mimemap in the applicationhost.config file, add `<remove fileExtension=".xap" />` above the mimemap as follows:

```
<remove fileExtension=".xap" />
<mimemap fileExtension=".xap" mimeType="application/octet-stream" />
```

where .xap is the mime type.