

# Kofax TotalAgility

## Installation Guide

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# Preface

This guide includes instructions for installing and upgrading to Kofax TotalAgility 7.4.0, 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.

It also includes instructions for installing Kofax TotalAgility 7.4.1. If Kofax TotalAgility 7.4.0 is already installed on your computer, ONLY follow instructions available in - [TotalAgility 7.4.1 installation](#).

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/en\\_US/740-uc0n6j0c5s/KTA.htm](https://docshield.kofax.com/Portal/Products/en_US/740-uc0n6j0c5s/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 `KofaxTotalAgilityDocumentation7.4.0_EN.zip` and `KofaxTotalAgilityDocumentation7.4.0_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](http://www.kofax.com) for complete details about the available training options and schedules.

## Get help for Kofax products

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

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

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

The Kofax Support page provides:

- Product information and release news  
Click a product family, select a product, and select a version number.
- Downloadable product documentation

Click a product family, select a product, and click **Documentation**.

- Access to product knowledge bases

Click **Knowledge Base**.

- Access to the Kofax Customer Portal (for eligible customers)

Click **Account Management** and log in.

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

- Access to support tools

Click **Tools** and select the tool to use.

- Information about the support commitment for Kofax products

Click **Support Details** and select **Kofax Support Commitment**.

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

## 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](http://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 7.4.0.
- When you purchase TotalAgility, the VRS Elite licenses are included with it. If you want to use VRS Elite, ensure that you install VRS Elite before installing TotalAgility and then configure VRS to use TotalAgility license. See [Configure VRS Elite for Kofax TotalAgility](#). For a complete description of the Kofax VRS Elite, visit the Kofax website.

## 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.

You can either install License Proxy when installing Kofax TotalAgility (see [Perform a standard installation](#)) or manually (see [Manual installation of TotalAgility License Proxy](#)).

**Important** If you have previously upgraded from Kofax TotalAgility 7.1.0 to 7.2.0 and are now upgrading to 7.4.0 and want to use License Proxy, then you must manually setup the license proxy on TotalAgility 7.2.0 before upgrading to 7.4.0. This action is not required if directly upgrading from TotalAgility 7.1.0 to 7.4.0.

## 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/>

## 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*.

## 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.

## VRS Elite

Sometimes factors such as security considerations influence a customer to perform image processing on the server. Depending on a customer's environment, documents, and preferences, there may be times when a customer does not want their server being bogged down performing image processing operations and would rather have images processed elsewhere. By default, TotalAgility performs image processing on the server. VRS Elite performs image processing on the scan station.

TotalAgility only supports TWAIN scanners. VRS Elite provides additional options to clean the image for TotalAgility scan clients using a VRS certified scanner.

When you purchase TotalAgility, the VRS Elite licenses are included with it. You must configure the Scan Workstations to communicate with the license server directly or through a license proxy.

- For a standard on-premise deployment, the administrator can configure VRS to use the Kofax TotalAgility license server and backup license server.
- For a linked server deployment linked to a standard on-premise deployment, the administrator can do the following:
  - Configure VRS to use the TotalAgility License server directly.
  - If direct communication with the License server is not possible, configure a license proxy to enable communication between the VRS workstations and the license server.
- The above rules also apply when using a backup license server.

## 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.

## 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.

## 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
<b>ServicesInstallOptions</b>		
CoreWorkerService	true	You can set it to True/False, as needed.
ImportService	true	You can set it to True/False, as needed.
ExportService	true	You can set it to True/False, as needed.
ReportingService	true	You can set it to True/False, as needed.
LicenseService	true	You can set it to True/False, as needed.
TransformationService	true	You can set it to True/False, as needed.
CoreServices	true	You can set it to True/False, as needed.
<b>LicenseServer</b>		
LicenseServerName	localhost	Enter the name of the license server.
PortNumber	3581	Do not change this value.
SerialNumber	no default	Enter your TotalAgility serial number.
ProductCode	no default	Enter your TotalAgility product code.
SkipLicense	true	Use this to skip activating the license.  <b>Note</b> If SkipLicense is set to false, you must enter the serial number and product code to install TotalAgility.
<b>InstallDirectory</b>	C:\Program Files\ Kofax\ TotalAgility	Specify the TotalAgility destination directory.
<b>DatabaseInformation</b>		

Parameter	Default Value	Description
InstallDatabases	true	Set to true to install 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.
<b>Main Database</b>		
DatabaseName	TotalAgility	Specify the name of the Main database.
Server	server name	Specify the name of your machine.  <b>Note</b> 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.
SqlScript		
CreateScript	Create_Main.SQL	Accept the default.
DropScript	Drop_Main.sql	Accept the default.
InitializeScript	Initialise_Main.sql	Accept the default.
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.
<b>Audit Database</b>		

Parameter	Default Value	Description
DatabaseName	TotalAgility	Specify the name of the Audit database.
Server	server name	Specify the name of your machine.
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.
<b>Finished Jobs Database</b>		
DatabaseName	TotalAgility	Specify the name of the Finished Jobs database.
Server	server name	Specify the name of your machine.
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	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.
<b>DataLayer - TotalAgility_Documents Database</b>		

Parameter	Default Value	Description
DatabaseName	TotalAgility_Documents	Specify the name of the TotalAgility_Documents database.
Server	server name	Specify the name of your machine.
SqlScript		
CreateScript	Repository2008_TablesCreate.sql	Accept the default.
DropScript	Repository2008_Drop.sql	Accept the default.
Conversion Script	Repository2008_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.
<b>Simulator Database</b>		
DatabaseName	TotalAgility_Simulator	Specify the name of the TotalAgility_Simulator database.
Server	server name	Specify the name of your machine.
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	
NewDatabase	false	Set to true to create new database.
<b>Reporting_Analytics Database</b>		

Parameter	Default Value	Description
DatabaseName	TotalAgility_Reporting	Specify the name of the TotalAgility_Reporting database.
Server	server name	Specify the name of your machine.
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.
<b>Reporting_Staging Database</b>		
DatabaseName	TotalAgility_Reporting_Staging	Specify the name of the TotalAgility_Reporting_Staging database.
Server	server name	Specify the name of your machine.
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		

Parameter	Default Value	Description
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.
<b>Identity Information</b>		
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.
<b>Prerequisite Info</b>		
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.
ImportSystemMaps	true	Set to true to import System maps.
SslEnabled	false	Set to true to enable https. See <a href="#">Configure for HTTPS communication</a> .
<b>Install Info</b>		
InstallAction	Install	Accept the default.
InstallMode	Silent	Accept the default.
InstallType	Both	Accept the default.
AuthenticationMode	windows	Set the authentication mode to windows.
<b>Transformation Server Info</b>		
<p><b>Note</b> Configure these settings if TransformationService is "true".</p>		

Parameter	Default Value	Description
TSConfigFile	no default	Specify the path to .ini file along with the name for Transformation Server to configure.  <b>Important</b> 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 <a href="#">.INI file Sample</a> for the parameters.
LogFile	no default	Set the location where the Transformation Server log file will be created.
InstallLocation	For example, C:\Program Files (x86)\Kofax\TotalAgility\TransformationServer	Specify the Transformation Server destination directory.
WindowsServiceAccount	no default	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	no default	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><b>Note</b> If you leave the pool name empty, all activities are processed regardless of their pools.</p>
OLEnabled	true	<p>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.</p> <p><b>Note</b> 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.
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.
ISIntegration Server	false	Set true to install the TotalAgility Integration Server.
InstallLicenseProxy	false	Set true to install License Proxy. If set to true, provide the username and password. Otherwise, leave the username and password blank.
TenantServiceURL	empty	Provide valid tenant URL

Parameter	Default Value	Description
<b>UserName</b>	empty	Provide the username if InstallLicenseProxy is set to true.
<b>Password</b>	empty	Provide the password if InstallLicenseProxy is set to true.
<b>KTAResourcePassword</b>	no default	Specify password for the TotalAgility user to be created on installation.

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_INSTALLLOCATION="C:\Program Files\Kofax\TotalAgility\Transformation Server"
TS_SERVICE_ACCOUNT=username
TS_SERVICE_PASSWORD=password
TS_SERVER_SERVICE_URL=http://servername/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=servername;Trusted_Connection=Yes;Database=totalagility;
TS_STARTSERVICE=TRUE
TS_SYNCHRONOUS_ONLY=false

```

## Silent installation on a separate Web or 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 `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 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
<b>InstallDirectory</b>	C:\Program Files\ Kofax\ TotalAgility	Specify the TotalAgility destination directory.
<b>ApplicationServerName</b>	no default	Enter the machine name of the application server.
<b>Identity Information</b>		
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.
<b>Prerequisite Info</b>		
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.
<b>SslEnabled</b>	false	Set to true to enable https. See <a href="#">Configure for HTTPS Communication</a> .
<b>Install Info</b>		
InstallAction	Required	Accept the default.
InstallMode	Silent	Accept the default.
InstallType	Both	Enter WebServer.

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
<b>InstallDirectory</b>	<code>C:\Program Files\ Kofax\ TotalAgility</code>	Specify the TotalAgility destination directory.
<b>DatabasesInformation</b>		
InstallDatabases	false	Set to false to ignore installing databases.
OverwriteIfExisting	false	Set to true to overwrite the existing databases.
<b>Main Database</b>		
DatabaseName	TotalAgility	Specify the name of the Main database.
Server	server name	Specify the name of your machine.  <b>Note</b> When installing TotalAgility with a remote database, update <code>SilentInstallConfig.xml</code> with the server name ( <code>&lt;Server&gt;servername&lt;/Server&gt;</code> ) of the machine on which the database resides. The account used to connect to the database during the installation requires DB_CREATOR rights.
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.
<b>Audit Database</b>		
DatabaseName	TotalAgility	Specify the name of the Audit database.
Server	server name	Specify the name of your machine.
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.
<b>Finished Jobs Database</b>		
DatabaseName	TotalAgility	Specify the name of the Finished Jobs database.
Server	server name	Specify the name of your machine.
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.
<b>DataLayer - TotalAgility_Documents Database</b>		
DatabaseName	TotalAgility_Documents	Specify the name of the TotalAgility_Documents database.
Server	server name	Specify the name of your machine.
SqlScript		
CreateScript	Repository2008_TablesCreate.sql	Accept the default.
DropScript	Repository2008_Drop.sql	Accept the default.
Conversion Script	Repository2008_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.
<b>Simulator Database</b>		
DatabaseName	TotalAgility_Simulator	Specify the name of the TotalAgility_Simulator database.
Server	server name	Specify the name of your machine.
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.
<b>Reporting_Analytics Database</b>		
DatabaseName	TotalAgility_Reporting	Specify the name of the TotalAgility_Reporting database.
Server	server name	Specify the name of your machine.
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.
<b>Reporting_Staging Database</b>		
DatabaseName	TotalAgility_Reporting_Staging	Specify the name of the TotalAgility_Reporting_Staging database.
Server	server name	Specify the name of your machine.

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.
<b>Identity Information</b>		
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.
<b>Install Info</b>		
InstallType	RTTS	Accept the default.  <b>Note</b> 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 <a href="#">Configure for HTTPS Communication</a> .
<b>Transformation Server Info</b>		
TransformationService	true	Accept the default.

Parameter	Default Value	Description
TSConfigFile	no default	Specify the path to .ini file along with the name for Transformation Server to configure.  <b>Important</b> 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 <a href="#">.INI file Sample</a> for the parameters.
LogFile	no default	Set the location where the Transformation Server log file will be created.
InstallLocation	For example, C:\Program Files (x86)\Kofax\TotalAgility\TransformationServer	Specify the Transformation Server destination directory.
WindowsServiceAccount	no default	Enter the name of the user who will run the Transformation Server.
WindowsServicePassword	no default	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.
PoolName	empty	If you set UseSpecificPool=true, enter the Transformation Server pool name.  <b>Note</b> If you leave the pool name empty, all activities are processed regardless of their pools.

Parameter	Default Value	Description
OLEnabled	true	<p>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.</p> <p><b>Note</b> 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 (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>&lt;add key="TSEExternalServicePortFor SyncProcessing" value="9001" /&gt;</pre> <p><b>Note</b> 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	

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

## 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
<b>DatabaseInformation</b>		
InstallDatabases	true	<p>Set to true to install the databases.</p> <p>Set to false to ignore installing databases.</p>

Parameter	Default Value	Description
OverwriteIfExisting	false	Set to true to overwrite the existing databases.
<b>Main Database</b>		
DatabaseName	TotalAgility	Specify the name of the Main database.
Server	server name	Specify the name of your machine.  <b>Note</b> 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.
SqlScript		
CreateScript	Create_Main.SQL	Accept the default.
DropScript	Drop_Main.sql	Accept the default.
InitializeScript	Initialise_Main.sql	Accept the default.
ConversionScript	Convert_Main.SQL	Only required for patch when there are SQL changes.
<b>Security</b>		
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.
<b>Audit Database</b>		
DatabaseName	TotalAgility	Specify the name of the Audit database.
Server	server name	Specify the name of your machine.
SqlScript		
CreateScript	Create_Audit.sql	Accept the default.

Parameter	Default Value	Description
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.
<b>Finished Jobs Database</b>		
DatabaseName	TotalAgility	Specify the name of the Finished Jobs database.
Server	server name	Specify the name of your machine.
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	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.
<b>DataLayer - TotalAgility_Documents Database</b>		
DatabaseName	TotalAgility_Documents	Specify the name of the TotalAgility_Documents database.
Server	server name	Specify the name of your machine.
SqlScript		
CreateScript	Repository2008_TablesCreate.sql	Accept the default.

Parameter	Default Value	Description
DropScript	Repository2008_Drop.sql	Accept the default.
Conversion Script	Repository2008_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.
<b>Simulator Database</b>		
DatabaseName	TotalAgility_Simulator	Specify the name of the TotalAgility_Simulator database.
Server	server name	Specify the name of your machine.
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	
NewDatabase	false	Set to true to create new database.
<b>Reporting_Analytics Database</b>		
DatabaseName	TotalAgility_Reporting	Specify the name of the TotalAgility_Reporting database.
Server	server name	Specify the name of your machine.
SqlScript		

Parameter	Default Value	Description
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.
<b>Reporting_Staging Database</b>		
DatabaseName	TotalAgility_Reporting_Staging	Specify the name of the TotalAgility_Reporting_Staging database.
Server	server name	Specify the name of your machine.
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	

Parameter	Default Value	Description
Password	empty	
NewDatabase	false	Set to true to create new database.
<b>Install Info</b>		
InstallType	DatabaseOnly	Accept the default.  <b>Note</b> When you install Database Only, it ignores the services. The services such as CoreworkerService, ImportService, ExportService are not installed.
<KTAResourcePassword>	no default	Specify password for the TotalAgility user to be created on installation.

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

## Upgrade TotalAgility in silent mode

When upgrading to TotalAgility 7.4.0, 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	Setting	Description
<b>Identity Information</b>		
UserName	username	Enter the name of the user who will run TotalAgility.
Password	password	Enter the password for the user who will run TotalAgility.
<b>Install Info</b>		

Parameter	Setting	Description
InstallAction	upgrade  <b>Note</b> Use this setting when performing a Web only 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.  <b>Note</b> If you upgrade TotalAgility components and then upgrade databases, you must do the following: <ol style="list-style-type: none"> <li>1. Open SilentInstallConfig.xml available at the following location:  <pre>\\TotalAgility Installation Information \Kofax TotalAgility</pre> </li> <li>2. Update the &lt;InstallAction&gt; section with the following parameter: &lt;InstallAction&gt;=Upgradedatabasesfor existingTotalAgility</li> <li>3. Run Setup.exe /Silent /U from the above mentioned path.</li> </ol>
	upgradeTotalAgilitycomponents	Use this setting to upgrade only TotalAgility components.
StartServices	true	To start the services manually after the upgrade installation, set the <b>StartServices</b> parameter to false.
<ImportWorkspacepackage>	false	To import the Workspace package after upgrade installation, set the <b>&lt;ImportWorkspacepackage&gt;</b> parameter to true.  <b>Note</b> 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**.

5. Click **Next**.  
The **Databases** window opens.
6. Either use the default settings or do the following:
  - If the database with the same name already exists, and if you want to overwrite the existing database, select the **Overwrite databases if they exist?** check box.
  - If you want to point to existing database in your local machine, clear the **Install Databases** and **Overwrite databases if they exist?** check boxes. Enter a name for each database and follow Step 10.
  - If you want to point to existing databases in a different machine, clear the **Install Databases** and **Overwrite databases if they exist?** check boxes and for each database do the following: 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.
7. Click **Next**.  
The **DB Connection Results** window opens and displays the results of connecting to databases.
8. Click **Next**.  
The **Software Checks** window opens. The system displays a list of required software and whether the software is installed.
9. 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.
10. Enter the credentials (password and confirm password) for the user to be created on installation.
11. Click **Next**.  
The **Install Options** window opens.
12. To import System maps, keep the **Import System Maps** check box selected and click **Next**.  
The **Installation Review** window opens and displays the settings.
13. Click **Next**.  
The **Installation Progress** window opens. The setup installs the required files, databases, and other integrated products.  
The **Licensing** window opens.
14. To connect to the license server, do the following:
  1. In the **License Server** field, enter the location of the License Server.

**Note** To connect to the shared License Server, enter the name or the IP address of the shared License Server.
  2. In the **Port Number** field, enter the port number on which the License Server listens.
15. Click **Next**.  
Alternatively, click **Skip** if you want to skip connecting to the License Server now but connect when launching TotalAgility.
16. 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.

## Install the 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** and click **Next**.
5. The **Application Server** window opens.
6. By default, all the services are selected and installed. The Windows services selected are: Core Worker, Reporting, License, Transformation, Import, Export services and WCF services include Core Services. 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 a different path and click **Next**.  
The **Credentials** window opens.
8. Enter the credentials 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. Either use the default settings or do one of the following:
  - If the database with the same name already exists, and if you want to overwrite the existing database, select the **Overwrite databases if they exist?** check box.

- To point to existing database in your local machine, clear the **Install Databases** and **Overwrite databases if they exist?** check boxes. Enter a name for each database and follow Step 13.
- To point to existing databases in a different machine, clear the **Install Databases** and **Overwrite databases if they exist?** check boxes and for each database do the following: 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.
- To manually install the databases, you should still run the setup.exe wizard to this screen and 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 then continue with the steps 13 - 26.

**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 **Install 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 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 **TotalAgility Resource Credentials** window opens

**16. Enter the credentials (password and confirm password) for the user to be created on installation and click Next.**

The **Install Options** window opens.

**17. Do the following:**

1. To automatically start the services, keep the **Automatically Start Services** check box selected.
2. Click **Next**.

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

**18. Click Next.**

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

19. Click **Next**.

The **License Proxy Configuration** window opens.

20. Do either of the following:

- Install a License Proxy:

1. Select the check box. The Tenant Service URL and System Session ID boxes are enabled.
2. If using Azure, enter `https://<tenantcode.hostname>` or if using on-premise multi-tenancy, enter `https://<tenantcode.hostname>/totalagility` in the **Tenant Service URL** box.

**Note** On creating a tenant in an on-premise multi-tenancy or Azure environment, an email with tenant URL is sent to the user. See [TotalAgility License Proxy installation](#).

3. Enter the **System Session ID**.

**Note** Log on to TotalAgility Designer and get the System Session ID from System Settings > Settings > General tab.

4. Click **Finish**. See the [step for finish](#).

**Note** If you want to use VRS Elite with TotalAgility, ensure to install VRS Elite first and install the License Proxy. See [Configure VRS Elite for Kofax TotalAgility](#).

- To skip license proxy, click **Next**.

The **Licensing** window opens. See the next step.

21. To connect to the License Server:

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

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

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

3. 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).

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

**Note** The ID of the selected License Server appears in the **Machine ID** field. The **Serial Number** and **Product Code** appear by default if the License Server is a shared license server.

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.

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.

**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 must activate the license when you log in to TotalAgility for the first time.

24. Click **Finish**.

Your installation is now complete.

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

**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 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 HP TRIM](#).

**Note** To view the TotalAgility version, go to the TotalAgility Designer and select System Settings > Settings > General tab.

## Install the 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** and click **Next**.
5. The **Application Server** window opens.
6. By default, all the services are selected and installed. The Windows services selected are: Core Worker, Reporting, License, Transformation, Import, Export services. 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 a different path and click **Next**.  
The **Credentials** window opens.
8. Enter the credentials 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. Do either of the following in **Windows Authentication** option:
  - To automatically login to the TotalAgility Designer and Workspace, keep the **Windows Authentication** check box selected (default).
  - To manually login to the TotalAgility Designer and Workspace, clear the **Windows Authentication** check box.

12. Click **Next**.  
The **Databases** window opens.
13. Either use the default settings or do the following:
  - If the database with the same name already exists, and if you want to overwrite the existing database, select the **Overwrite databases if they exist?** check box.
  - To point to existing database in your local machine, clear the **Install Databases** and **Overwrite databases if they exist?** check boxes. Enter a name for each database and follow Step 13.
  - To point to existing databases in a different machine, clear the **Install Databases** and **Overwrite databases if they exist?** check boxes and for each database do the following: 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.
  - To manually install the databases, you should still run the setup.exe wizard to this screen and 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 then continue with the steps 13 - 26.

**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*.

14. 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.

15. 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 software is installed.
16. 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
17. Enter the credentials (password and confirm password) for the user to be created on installation and click **Next**.  
The **Install Options** window opens.
18. Do the following:
  1. To automatically start the services, keep the **Automatically Start Services** check box selected.

2. To import system maps, keep the **Import System Maps** check box selected.
3. To enable system maps, keep the **Enable Sticky Sessions** check box selected.
4. Click **Next**.

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

19. Click **Next**.

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

20. Click **Next**.

The **License Proxy Configuration** window opens.

21. Do either of the following:

- Install a License Proxy:

1. Select the check box. The Tenant Service URL and System Session ID boxes are enabled.
2. If using Azure, enter `https://<tenantcode.hostname>` or if using on-premise multi-tenancy, enter `https://<tenantcode.hostname>/totalagility` in the **Tenant Service URL** box.

**Note** On creating a tenant in an on-premise multi-tenancy or Azure environment, an email with tenant URL is sent to the user. See [TotalAgility License Proxy installation](#).

3. Enter the **System Session ID**.

**Note** Log on to TotalAgility Designer and get the System Session ID from System Settings > Settings > General tab.

4. Click **Finish**. See the [step for finish](#).

**Note** If you want to use VRS Elite with TotalAgility, ensure to install VRS Elite first and install the License Proxy. See [Configure VRS Elite for Kofax TotalAgility](#).

- To skip license proxy, click **Next**.

The **Licensing** window opens. See the next step.

22. To connect to the License Server:

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

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

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

3. 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).

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

**Note** The ID of the selected License Server appears in the **Machine ID** field. The **Serial Number** and **Product Code** appear by default if the License Server is a shared license server.

24. 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.

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.

**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 must activate the license when you log in to TotalAgility for the first time.

25. 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 HP TRIM.](#)

**Note** To view the TotalAgility version, go to the TotalAgility Designer and select System Settings > Settings > General Tab.

## Install the Web Server

1. Navigate to \\TotalAgility\TotalAgilityInstall 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** 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. Enter the web **Server Name** with a fully qualified machine name, such as  
<machinename>.<fullyqualifieddomainname>:<portnumber>.
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 > IIS Manager > Sites > Add Web Site.

11. Do either of the following in **Windows Authentication** option:
  - To automatically login to the TotalAgility Designer and Workspace, keep the **Windows Authentication** check box selected (default).

- To manually login to the TotalAgility Designer and Workspace, clear the **Windows Authentication** 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 **Install Options** window opens.
  14. To enable sticky sessions, select the **Enable Sticky Sessions** check box.

**Note**

- Using sticky session helps to improve the response time for capture users by processing work more efficiently. Sticky sessions must also be enabled in the NLB cluster for this to work.
- The Sticky Sessions feature is only available with an all-in-one installation, for example, when both the Application Server and Web Server are installed on one node. If the Application Server and Web Servers are on separate nodes, the Sticky Sessions feature cannot be enabled in TotalAgility.
- You can enable or disable sticky sessions post installation also. See the *Kofax TotalAgility Configuration Utility Guide* for more information.
- If sticky session is enabled, the batch session time-out does not work, instead idle time-out of TotalAgility Application Pool works in IIS.

15. Click **Next**.  
The **Installation Review** window opens and displays the settings.
16. Review the settings and click **Next**.  
The **Installation Progress** window opens. The setup installs the required files, databases, and other integrated products.
17. 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.

## Install Real Time Transformation Service

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 > IIS Manager > 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 automatically login to the TotalAgility Designer and Workspace, keep the **Windows Authentication** check box selected (default).
  - To manually login to the 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.

## Upgrade Transformation Designer Help

The Transformation Designer help is not automatically updated when you install Kofax TotalAgility 7.4. 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\_7.4" or something similar.  
Leave the window open as you will need it again later.
3. In the Kofax TotalAgility 7.4 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\_7.3.0" directory and try again.

## Install TotalAgility on a non-standard port

1. Click `Start > Run > IIS Manager > Sites > Default Web Site`.  
By default, the **Default Web Site** is selected.
2. Right click on the Default Website 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/Agility.Server.Web/forms/GeneralWorkQueue.form`.

## Start the Streaming Service

When Kofax TotalAgility is installed on a non-standard port, follow the steps below to update the base address and restart streaming service.

You can edit the setting manually or use the Configuration Editor Tool

## 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>//Agility.Sdk.Services.StreamingService" />
</ 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>//Agility.Core.Services.StreamingService" />
</ baseAddresses >
```

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

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

4. Restart the Streaming Service.

## Using the Configuration Utility

1. 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.
2. The streaming service hosts an http server. If it is running under a **non-admin** account on a nonstandard port, you need to reserve a namespace for it. To do so, on the Command Prompt, run the following command using an account that has administrator rights on the local machine. Once the command has completed, you must restart the streaming service.

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

## 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](#).

- When you have split databases such as Main database and Archive database, you require Microsoft Distributed Transaction Coordinator (MSDTC).
  - The MSDTC should be enabled on the machine and the following settings should be selected:
    - Network DTC Access
    - Transaction Manager Communication (Authentication is not required)
    - Enable XA transactions
    - Enable SNA LU 6.2 Transactions
  - After the settings are completed, you should start the Distributed Transaction Coordinator service.
- TotalAgility license tables are installed by [running the Create\\_KLS\\_OnPremise.sql](#).
  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:
    1. @NTNAME = 'INSTALL\_NTUSERID', where the User Domain and User ID replaces INSTALL\_NTUSERID. For example, 'DomainName\USERA'
    2. @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.
    1. 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
    2. Finished Jobs(Create)  
Run the following script on the Finished Jobs database (can exist on the Main database):
      - Create\_Archive.sql
    3. Audit(Create, Intialise)  
Run the following scripts on the Audit database (can exist on the Main database):
      - Create\_Audit.sql
      - Initialise\_Audit.sql
    4. Simulator(Create)

Run the following script on the Simulator database:

- Create\_Simulator.sql

#### 5. Data Layer Database(Create)

The Repository2008\_Create.sql or Repository2012\_Create.sql script creates the documents database.

1. Run Repository2008\_Create.sql or 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:

1. Clear the check boxes for "Install Databases" and "Overwrite databases if they exist check".
2. 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 Repository2008 or Repository2012 or the name given while creating the databases.

3. 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:
1. Go to the TotalAgility Main database > SERVER\_DATA table > CEBPM\_SETTINGS column.
  2. Open the CEBPM\_SETTINGS XML file.

3. 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.

## Import Artifacts

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

**Note** On upgrading TotalAgility, you must manually import the System Maps and Standard Forms.

The following table provides the artifact names and the path from where these artifacts can be imported.

Artifacts	Path
System Maps	\\TotalAgility\System Maps\SystemMaps.Zip>
Standard Forms	\\TotalAgility\Agility.Server.Web\StandardForms \StandardForms.zip>
Customer Assets (workspace themes)	\\TotalAgility\Agility.Server.Web\Forms\StyleSheets \*.css>

**Note** You must import all the files available in the style sheet directory.

## 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 TotalAgility 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**
- **Core Worker config**
- **Export Worker config**

### Encrypt and decrypt the Web Config file

The TotalAgility Web.config file is located under `<Kofax Install location>\TotalAgility\Agility.Server.Web`.

Use Microsoft ASP.NET IIS Registration Tool (aspnet\_regiis) to encrypt or decrypt any section of the Web.config file. See the following link for more information: [http://msdn.microsoft.com/en-us/library/zhhddkxy\(v=vs.100\).aspx](http://msdn.microsoft.com/en-us/library/zhhddkxy(v=vs.100).aspx).

In this case, encrypt the appSettings section as it includes the Database connection information.

### Encrypt and decrypt the Core Worker or Export Worker config file

The TotalAgility **Core Worker config** and **Export Worker config** files are located under `<Kofax Install location>\TotalAgility\CoreWorkerService`.

The TotalAgility Server supports two encryption methods depending on command line parameters using [Kofax.CEBPM.EncryptConfig.exe](#) utility:

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

#### Use the Kofax.CEBPM.EncryptConfig.exe utility

The Kofax.CEBPM.EncryptConfig.exe (located in the TotalAgility installation\_folder) utility encrypts (-enc) or decrypts (-dec) any section of the configuration file.

In this case, encrypt the appSettings section as it includes the user ID and password as well as other information. Use the optional -h flag to display help for the command.

Kofax.CEBPM.EncryptConfig.exe cannot work with Web.config, it can only work with configs of executables.

**Important** Add the following security provider in the config 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 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**

## Use the 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:
  1. Log on to the TotalAgility Server with administrator rights.
  2. Open a command-line window.
  3. Navigate to the .NET Framework version 4.0 directory. For example, enter the following command:  
**cd \WINDOWS\Microsoft.Net\Framework\v4.0.\***

4. 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:
  1. Log on to the TotalAgility Server as the Kofax TotalAgility Core Worker Server service user.
  2. Navigate to the installation directory for the TotalAgility Server 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 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:
  1. Log on to the TotalAgility Server with administrator rights.
  2. Copy the keys.xml file from the source TotalAgility Server to the root C:\ directory of the target TotalAgility Server.
  3. Open a command-line window.
  4. 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.
  5. 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 Export configuration file also.

## 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

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  $\geq 1$ , 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, "BasicHttpBinding\_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, "BasicHttpBinding\_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.

## Log on to TotalAgility using a phone or tablet form

Edit the setting manually or use the Configuration Utility to log on to TotalAgility using a phone or tablet form.

### Manually

1. Open the TotalAgility **Web.config** file from the following directory: \\TotalAgility\Agility.Server.Web
2. Select the mode of authentication as **HTTP with manual logon** or **HTTPS with manual logon**. See the *TotalAgility help* for more information.

**Note** For on-premise and on-premise multi-tenancy environments, clear the cache for the changes to take effect; Azure uses HTTPS SSL with Application Logon by default.

### Using the Configuration Utility

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

## 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.

```
<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*.

## 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 the thread pool monitoring interval as required:

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

The default value is 60.

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

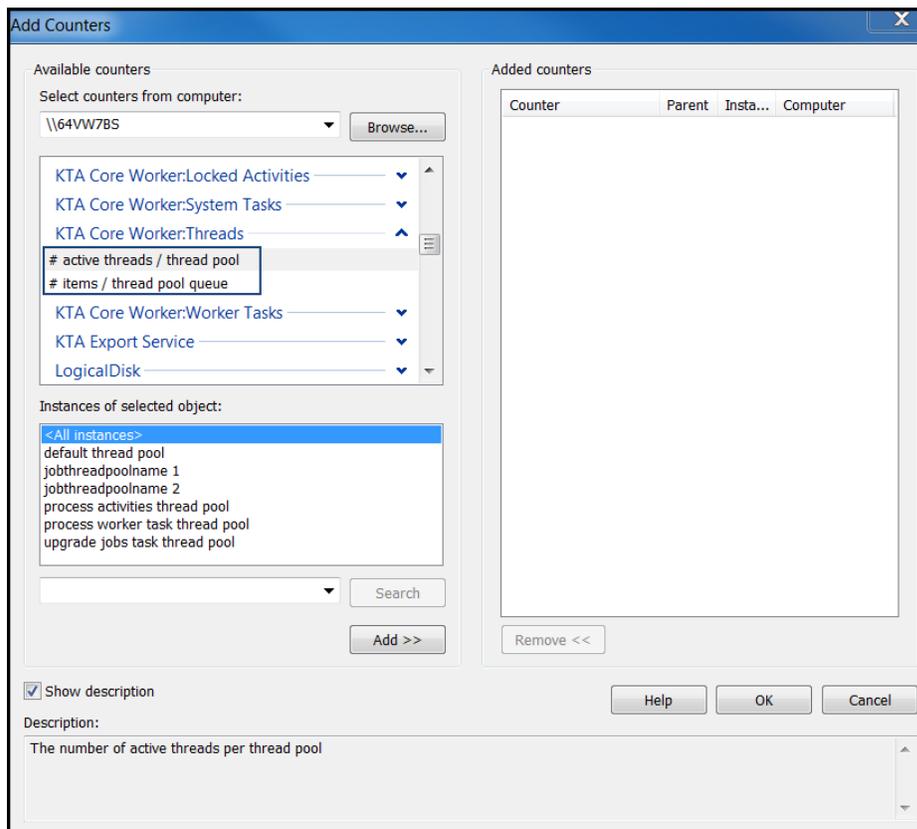
Use the performance counters to record application states and activities.

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*.

## Install the language pack

Go to KEF to download <language>.zip.

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 the TotalAgility documentation

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

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

### Note

- When upgrading to TotalAgility 7.4.0 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.
- See [Access the TotalAgility 7.4.1 documentation](#) if upgrading to TotalAgility 7.4.1.

To view the TotalAgility help in an offline mode, do the following:

1. Download the help package from the [Kofax Fulfillment Site](#).
2. Manually copy the extracted help to `\\TotalAgility\Agility.Server.Web\Help` folder.  
If you fail to copy the extracted help to this folder, an error appears.
3. Navigate to the installation directory and open TotalAgility Web.config in a text editor from the following location:

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

4. Locate the <appSettings> section and remove the OnlineHelpURL key:

```
<add key="OnlineHelpURL" value="http://docshield.kofax.com/KTA"/>
```

Alternatively, run the Configuration Utility to remove the URL for online help from the OnlinehelpURL setting. See the *Kofax TotalAgility Configuration Utility Guide*.

**Note** If you copy the extracted help to `\\TotalAgility\Agility.Server.Web\Help` directory but fail to remove the OnlineHelpURL setting from Web.config, the online help will be displayed on clicking the Help icon.

5. Save and close the configuration file.
6. Navigate to TotalAgility and click the Help icon.

TotalAgility help is displayed.

## Help for Kofax Export Connector

To view the help for Kofax Export Connector in an offline mode, do the following.

1. Download the help package from the Kofax Fulfillment Site available at <https://delivery.kofax.com>.
2. Manually copy the extracted help to `\\TotalAgility\Agility.Server.Web\Help\ExportConnector_help` folder.
3. Navigate to the installation directory and open `Agility.Server.ExportConnector.exe.config` in a text editor from the following location:

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

4. Locate the `<appSettings>` section and remove the `OnlineHelpURL` key:

```
<add key="OnlineHelpURL" value="http://docshield.kofax.com/KTA"/>
```

If you copy the extracted help to `\\TotalAgility\Agility.Server.Web\bin` folder but fail to remove the `OnlineHelpURL` setting from `Web.config`, the online help will be displayed on clicking the Help icon.

5. Save and close the configuration file.
6. Navigate to Kofax Export Connector and click the Help icon.  
The help for Kofax Export Connector is displayed.

## Run EVRSCheck utility

The `EvrCheck` 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 **EvrCheck.exe** available at the following location in the Installation folder:

`\\TotalAgility\Utilities\EvrCheck`

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 **EVR 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 reprocesses as you type.

## Chapter 3

# TotalAgility 7.4.1 installation

This chapter describes two methods for installing TotalAgility 7.4.1.

- [Silent installation](#) without any user interaction.
- [Standard installation](#) using the installation wizard.

## Perform a standard installation

To install TotalAgility 7.4.1, perform the following steps.

1. Navigate to `\\TotalAgility\TotalAgilityInstall` on the installation media.
2. Right click Setup.exe and **Run As Administrator**.  
The Kofax TotalAgility Installation Program window opens.
3. Click **Next**.  
A pop-up is displayed to remind you to take a backup of the TotalAgility databases, if not already taken.
4. Click **OK** to continue with the installation.
5. Click **Next**.  
The Installation Progress window opens. The setup installs the required files, databases and other integrated products.
6. Click **Finish**.  
Your installation is now complete.

**Note** If you had installed the Transformation Server along with TotalAgility 7.4.0, a pop-up will be displayed. Click Yes to install the Transformation Server automatically.  
Reboot the server machine that runs the Transformation Server service.

## Perform a silent installation

Use the TotalAgility silent installation to install TotalAgility 7.4.1 without any user interaction.

1. Open the Command Prompt window as an Administrator and change the command line to the root directory of the Setup.exe file.
2. Run `Setup.exe /Silent /Hotfix`.  
The following items are installed automatically:
  - Kofax TotalAgility
  - Document Repository

- Kofax Import Connector (KIC)
- Kofax Transformation Designer
- Utility for Kofax Export Connector
- Transformation Server

**Note** If you had installed the Transformation Server along with TotalAgility 7.4.0, the Transformation Server will be installed automatically for TotalAgility 7.4.1. Reboot the server machine that runs the Transformation Server service.

The system generates a summary log which reports the summary of the installation and also generates an error log, (if any). These logs are generated on the desktop.

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

**Note** Perform the above steps on both the Application and Web server, if they are installed separately.

## TotalAgility 7.4.1 uninstallation

On uninstalling TotalAgility, the applied service pack is automatically uninstalled. You can uninstall the latest service pack without uninstalling the entire product.

**Note** If the database has changed or some work has been performed, the data is lost on uninstallation. If you need to keep that data, before installing a service pack or fix pack, back up the databases.

### Perform a standard uninstallation

1. Click **Start > Control Panel > Programs and Features** and select **View installed updates**. A list of the most recently installed service pack appears.
2. Right-click the service pack and click **Uninstall**.  
If there are any database changes to the service pack, a warning is displayed to inform that databases for the previous version must be restored after the uninstallation is complete.
3. Click **OK**.

When the uninstallation is complete, the TotalAgility component of the product rolls back to the previous installed version, and an entry is available in the event log to indicate that a service pack is removed. For example, when you apply X.1.1 service pack and then X.1.2 service pack, you can only uninstall the X.1.2 service pack (latest version). To uninstall X.1.1, you must remove the application completely.

**Note** You must separately uninstall the other components on each server.

## Perform a silent uninstallation

1. On the Command Prompt, change the command line to the root directory of the Setup.exe file.
2. Run `Setup.exe /Silent /pu`.

The system uninstalls the service pack and automatically creates a log file on your desktop. This log file contains information on errors, if any. The removal of the service pack is indicated in the log file.

Note the following:

- Uninstalling a service pack in silent mode only removes the applied fix pack or service pack. See [Use the silent mode](#) to uninstall Kofax TotalAgility application completely. To reinstall TotalAgility, you must install its base version and then apply any patches.
- You must restore the databases to 7.4.0 after uninstalling 7.4.1.
- You must separately uninstall the other components on each server.

## Access TotalAgility 7.4.1 documentation

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

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

**Note** When upgrading to TotalAgility 7.4.1 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.

To view the TotalAgility help in an offline mode, do the following:

1. Download the help package from the [Kofax Fulfillment Site](#).
2. Manually copy the extracted help to `\\TotalAgility\Agility.Server.Web\Help` folder.  
If you fail to copy the extracted help to this folder, an error appears.
3. Navigate to the installation directory and open TotalAgility Web.config in a text editor from the following location:

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

4. Locate the <appSettings> section and remove the OnlineHelpURL key:

```
<add key="OnlineHelpURL" value="http://docshield.kofax.com/KTA"/>
```

Alternatively, run the Configuration Utility to remove the URL for online help from the OnlinehelpURL setting. See the *Kofax TotalAgility Configuration Utility Guide*.

### Note

- If you copy the extracted help to `\\TotalAgility\Agility.Server.Web\Help` directory but fail to remove the OnlineHelpURL setting from Web.config, the online help will be displayed on clicking the Help icon.
- If upgrading to TotalAgility 7.4.1 and if the documentation for the base version (7.4.0) already exists, you must overwrite the existing contents with the extracted contents.

5. Save and close the configuration file.

6. Navigate to TotalAgility and click the Help icon.  
TotalAgility help is displayed.

## Help for Kofax Export Connector

To view the help for Kofax Export Connector in an offline mode, do the following.

1. Download the help package from the Kofax Fulfillment Site available at <https://delivery.kofax.com>.
2. Manually copy the extracted help to `\\TotalAgility\Agility.Server.Web\Help\ExportConnector_help` folder.
3. Navigate to the installation directory and open `Agility.Server.ExportConnector.exe.config` in a text editor from the following location:

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

4. Locate the `<appSettings>` section and remove the `OnlineHelpURL` key:

```
<add key="OnlineHelpURL" value="http://docshield.kofax.com/KTA"/>
```

If you copy the extracted help to `\\TotalAgility\Agility.Server.Web\bin` folder but fail to remove the `OnlineHelpURL` setting from `Web.config`, the online help will be displayed on clicking the Help icon.

5. Save and close the configuration file.
6. Navigate to Kofax Export Connector and click the Help icon.  
The help for Kofax Export Connector is displayed.

## Chapter 4

# 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 the following:

- For development environments, install the Transformation Server Bundle where you installed TotalAgility. For production environments, we recommend to install the Transformation Server Bundle on a separate machine other than where TotalAgility is installed to avoid performance issues.
- 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 config 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:

```
setup.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%
```

Optionally, call `TS_SETUP_CONFIG_FILE` (default: empty): 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_SERVICE_ACCOUNT=.\serviceUser
TS_SERVICE_PASSWORD=secretPwd
TS_MAIN_DB_CONNECTION_STRING=Server=localhost;Trusted_Connection=Yes;Database=TotalAgility;
TS_AUDIT_DB_CONNECTION_STRING=Server=localhost;Trusted_Connection=Yes;Database=TotalAgility;
TS_ARCHIVE_DB_CONNECTION_STRING=Server=localhost;Trusted_Connection=Yes;Database=TotalAgility;
TS_REPORTING_STAGING_DB_CONNECTION_STRING=Server=localhost;Trusted_Connection=Yes;Database=TotalAgility;
```

See the TransformationServer 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.

## Uninstall Transformation Server

When you install Transformation Server as a part of Kofax TotalAgility standard installation, uninstalling Kofax TotalAgility will automatically uninstall Transformation Server. When you install the Transformation Server Bundle on a separate system, uninstall the Transformation Server Bundle from the Control Panel.

To uninstall in a silent mode.

1. Navigate to the root directory of `Setup.exe`.
2. Run `Setup.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.

## 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 **setup.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** and click **Next**.

The system prompts you for a destination folder for the Transformation Server.

7. Enter the destination and click **Next**.
8. 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.
  1. In the **This account** field, enter the user name. To specify a domain user, enter the user name in the format Domain\User.
  2. Enter and confirm the **Password**.
  3. Click **Next**.

The **Obtaining TotalAgility configuration** window opens.

9. Enter the data to connect to the main database and TotalAgility Server Service.
  1. Enter the connection string to connect to and authenticate with the main database. Use the following syntax:

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

Specify the address of the database server and the user name and password to authenticate with database where indicated. The following is an example:

```
Server=dbserver\dbinstance;Database=TotalAgility;User ID=dbo_id;Password=dbopassword;
```

2. Enter the URL of the TotalAgility Server Service. Both http and https addresses are supported. Use the following syntax:

```
https://<server address>/TotalAgility/Services/Core/ServerService.svc
```

For example, if the server address is ktaserver, the URL is as follows:

```
https://ktaserver/TotalAgility/Services/Core/ServerService.svc
```

3. Click **Next**.
10. Specify the connection options:
  1. To enable the Transformation Server to process online learning tasks, select **Enable Online Learning processing by this Transformation Server instance**.
  2. 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**.

3. Click **Next**.
11. Click **Next**.

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

**12.** 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, "**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**.

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

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

**14.** Click **Finish** to continue.

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

**15.** Click **Close** to close the success message window.**16.** From the Service console, start the **Kofax Transformation Server** service.**17.** 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:
  1. Log on to the Transformation Server with administrator rights.
  2. Open a Command Prompt window.
  3. Navigate to the .NET Framework version 4.0 directory. For example, enter the following command:

```
cd \WINDOWS\Microsoft.Net\Framework\v4.0.*
```
  4. 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:
  1. Log on to the Transformation Server as the Transformation Server service user.
  2. Navigate to the installation directory for the Transformation Server 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 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:

1. Log on to the Transformation Server with Administrator rights.
2. Copy the keys.xml file from the source Transformation Server to the root C:\ directory of the target Transformation Server.
3. Open a Command Prompt window.
4. 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.

5. 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:

1. 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.

2. 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.

## Chapter 5

# Reporting Server installation

This chapter describes the [Standard installation](#) procedure for installing the Kofax Reporting Server using the installation wizard.

## Perform a silent installation

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

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.
MAIN_DB_CONNECTION_STRING	no default	Enter the connection string for the Main database. Example: "Server=<hostname>;Trusted_Connection=Yes;Database=
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.

Parameter	Default Value	Description
REPORTING_WORKHOUSE_DB_CONNECTION_STRING	CONNECT	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_WORKHOUSE_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:

1. In the Username field, enter the username.

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

2. Enter and confirm the Password.
3. Click **Next**.
7. In the Obtaining TotalAgility Configuration window:
  1. 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.

2. In the Main DB connection string box, enter the connection string for the TotalAgility database.
3. Click **Next**.  
The system downloads the configuration settings.
8. Click **Install** to begin installation.
9. Click **Finish**.

## Chapter 6

# Integrate Microsoft SharePoint with TotalAgility

Set up the SharePoint server and the TotalAgility server for using SharePoint 2010 or SharePoint 2013 in TotalAgility.

**Note** We recommend that you install the SharePoint integration components on a different machine from TotalAgility, otherwise you may encounter issues when you upgrade TotalAgility.

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.
  1. To install the SharePoint web parts, select the **TotalAgility SharePoint WebParts** check box.
  2. To install the SharePoint web service and event-handler dlls, select the **TotalAgility SharePoint Event-Handling Components** check box.
  3. 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.

**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
<b>TAEmbeddedSolutionURL</b>	Point to the TotalAgility site URL to integrate into the SharePoint web application.	TheTotalAgility Form site is available at the same location as the SharePoint web application.
<b>TALogonUserIdentifier</b>	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.
<b>TAWorkqueueEmbeddedForm:</b>	Point to the form in the TotalAgility Form site to use in the Workqueue custom page.	The WorkQueue.form is used.
<b>TAJobListEmbeddedForm</b>	Point to the form in the TotalAgility Form site to use in the JobList custom page.	The JobList.form is used.
<b>TADocURLIdentifier</b>	Point to the identifier that passes the SharePoint document URL into embedded CreateNewJob forms in TotalAgility.	The DOC_URL is used.
<b>TADocNameIdentifier</b>	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.TextExceptionFormatter,
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:
  1. Add the SharePoint site location and Kofax TotalAgility SharePoint communicator using HTTPS into the Kofax TotalAgility integration module (Home>Integration>SharePoint).

2. 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:
  1. Apply certificate onto SharePoint Server for that particular Sharepoint site.
  2. 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:
  1. Open **Internet Information Services (IIS) Manager**.
  2. Click **Sites > Default Web Site > TotalAgility**.
  3. On the **Features View** tab, double-click **Authentication**.
  4. Right-click **Windows Authentication** and click **Providers**.
  5. 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:
  1. Open **Internet Information Services (IIS) Manager**.
  2. Click **Sites > Default Web Site > TotalAgilitySharePointCommunicator**.
  3. On the **Features View** tab, double-click **Authentication**.
  4. Right-click **Windows Authentication** and click **Providers**.
  5. Check if, **Negotiate** and **NTLM** are available as providers. If not, add them from the **Available Providers** list.
  6. 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.

1. In the **Web.config** file for TotalAgility, replace `<transport clientCredentialType="Windows" />` with `<transport clientCredentialType="None" />` in the following bindings:
  - BasicHttpBinding\_SharepointCommunicatorService
  - BasicHttpBinding\_Service
  - BasicHttpBinding\_CoreService
  - WebHttpBinding\_Service
2. 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.
3. 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::GetSessionId()".

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 GetSessionId() API, you can avoid a separate logon to the TotalAgility forms that are integrated into SharePoint. The GetSessionID() 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>/_layouts/WorkQueue.aspx?EmbeddedForm=WorkQueue.form</p> <div style="background-color: #f0f0f0; padding: 5px;"> <p><b>Note</b> Rename WorkQueue.form to point to your TotalAgility work queue form; do not change the name if the form is called WorkQueue.form.</p> <p>If the Quick Launch menu is on a subsite, prefix the subsite name in the link as follows: /SubSiteName/_layouts/WorkQueue.aspx?EmbeddedForm=WorkQueue.form</p> </div>
TotalAgility Create Workflows	<p>/_layouts/CreateJob.aspx?EmbeddedForm=Create%20Jobs.form</p> <div style="background-color: #f0f0f0; padding: 5px;"> <p><b>Note</b> Rename Create%20Jobs.form to point to your TotalAgility CreateNewJob form; do not change the name if the form is called Create Jobs.form.</p> <p>You can create multiple TotalAgility Create Workflow headings to point to different TotalAgility CreateNewJob embedded forms.</p> <p>If the Quick Launch menu is on a subsite, prefix the URL with SubSiteName as explained for TotalAgility Workqueue .</p> </div>
TotalAgility Workflows	<p>/_layouts/JobList.aspx?EmbeddedForm=JobList.form</p> <div style="background-color: #f0f0f0; padding: 5px;"> <p><b>Note</b> Rename JobsList.form to point to your TotalAgility JobList form; do not change the name if the form is called JobList.form.</p> <p>If the Quick Launch menu is on a subsite, prefix the URL with SubSiteName as explained for TotalAgility Workqueue.</p> </div>

## 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 TakeActivity 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:
  1. Go to **Site Actions > Edit page**.
  2. Click **Add a Web Part**.
  3. 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 the following:

- 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:
  1. Search for `"<add name="Session">` and uncomment this line.
  2. 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:
  1. Go to **Computer Management\Message Queuing\Private Queues**.

2. 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"
  receiveErrorHandler="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 7

# Integrate Microsoft Dynamics CRM with TotalAgility

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

## 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.

## Chapter 8

# 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
<b>DAX website Physical Location</b>	C:\inetpub\wwwroot \MicrosoftDynamicsAXAif50\	C:\Program Files\Microsoft Dynamics AX\60\AifWebServices
<b>DAX website URL</b>	Default Web Site/ MicrosoftDynamicsAXAif50/	Default Web Site/ MicrosoftDynamicsAXAif60/
<b>DAX Client Physical Location</b>	C:\Program Files\Microsoft Dynamics AX\50\Client\Bin\	C:\Program Files (x86)\Microsoft Dynamics AX \60\Client\Bin
<b>DAX Server Physical Location</b>	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**.

## 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:
  1. 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`.
  2. .NET code namespace: **KtaEventsService**.
  3. Reference name: **KtaEventsService**.
  4. 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 **client\bin** 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 **client\bin** 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:
  1. On the Actions panel, click **Advanced Settings**.
  2. 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 10

# Integrate HP TRIM with TotalAgility

This chapter provides the instructions for integrating HP TRIM with TotalAgility.

## Identify the TRIM SDK Version

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 HP TRIM server](#)).

## Set up the HP TRIM server

To set up the TRIM server, install and configure TotalAgilityTrimCommunicatorService and then configure the event handler in HP TRIM.

### Install and configure TotalAgilityTrimCommunicatorService

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

1. Log on to the HP TRIM server with an account with Local Administrator privilege.
2. Navigate to the `\\TrimInstallation` on the installation media, right click on the executable **Setup.exe** and select **Run As Administrator**.  
The installation wizard appears.
3. Click **Next**.
4. Click **Finish**.
5. From the location where TRIM is installed, such as `C:\Program Files\Hewlett-Packard\HP TRIM\`, copy **TrimSDKPIA20.dll** to Global Assembly Cache (GAC).
6. Configure the **Web.config** file:
  1. In `C:\Program Files\Kofax\TotalAgility\TotalAgilityTrimCommunicatorService`, open the **Web.config** file in the text editor.

2. 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 HP TRIM with TotalAgility](#).

3. 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 document URI value. If you do not know the document URI value, enter **4**.
- Replace the FolderRecordType with the folder URI value. If you do not know the folder URI value, enter **3**.
- 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 TRIM integration, a TrimIntegrationAppPool with a local system identity is created. This causes an error if the TRIM server is remote. To resolve this error, you must update the TrimIntegrationAppPool identity to account with administration permission.

## Configure the event handler in HP TRIM

Configure TotalAgility events for actions in the HP TRIM System.

1. 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**
2. For TRIM 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:
  1. Open **TRIM**.

2. Select **Tools > Context Administration > External Links**.  
The TRIM Context External Links window appears.
  3. Click **New Record AddIn**.  
The Record AddIn Properties window appears.
  4. Enter a Link Name.
  5. In the COM Add-In PROGID box, enter the  
ProgId,**Agility.Server.Integration.Trim.TrimIntegrationEventHandler**.
  6. Select **Add-In supports a multi-threaded environment**.
  7. Click **OK**.  
The TRIM Context External Links window displays the new link.
  8. Select the link and click **Properties**.  
The Record AddIn Properties window appears.
  9. Click the **Used By** tab.
  10. Check the Document and File Folder under Record list and click **OK**.  
This configures the Event handler on TRIM.
4. In C:\Program Files\Hewlett-Packard\HP TRIM\, open the **trim.exe.config** file 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.TextExceptionHandler,
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 11

# CCM proxy installation on the Web server

This chapter describes two methods for installing the CCM Proxy Web server:

- Silent installation.
- Standard installation.

Ensure that the Microsoft plugin, Web Platform Installer is installed before installing the CCM Proxy Web server. You can install the Microsoft Web Platform from the following location: <https://www.microsoft.com/web/downloads/platform.aspx>

## Silent Installation

1. On the installation media, navigate to `\\CCMProxyInstallation`.
2. Launch a Command Prompt window and run **Setup.exe** and enter the CCM Server URL in the following format: `http(s)://<CCMServer>:<Portnumber>`.  
Provide the IP address and port number of the CCM server. The installer updates the Web.config file with CCM server details and enables the proxy rewrite rules on the web server (IIS).
3. Press **Enter**.  
The CCM 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 `\\CCMProxyInstallation` and double-click **Setup.exe**.  
The **CCM Proxy Configuration** window appears.
2. Enter the **CCM Server URL** in the following format: `http(s)://<CCMServer>:<Portnum>`.  
The Web.config file is automatically updated with the CCM Server IP and the Port number.
3. Click **Configure**.
4. Click **OK**.

## Update the CCM Server URL in the TotalAgility Web.config

You can manually update the CCM Server URL in TotalAgility Web.config or run the Configuration tool and update the settings before setting up the integration to CCM.

## Manually update the CCM Server URL in the 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>
  </rules>
```

4. Replace the `http://<ccmserver>:<port>` with the `ccmserver` 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).

## 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. First ensure that SSL is enabled for TotalAgility in the IIS and then change the bindings in the TotalAgility configuration files.

### 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**.
  1. On the **Type** list, select **https**.
  2. On the **SSL certificate** list, select the certificate.
  3. If installing a separate web server, additionally specify the **IP address** of the web server, and **Port** number.
  4. Click **Ok**.
4. Click TotalAgility and click **SSL settings** on the **Features** tab.
  1. Select the check box for **Require SSL**.
  2. **Accept** the Client certificates.
  3. 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
- BasicHttpBinding\_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
- BasicHttpBinding\_CoreService
- BasicHttpBinding\_SharepointCommunicatorService
- BasicHttpBinding\_TrimCommunicatorService

- Restart the TotalAgility CoreWorker service.
- Save the file.

## 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:
  - WebHttpExportBinding\_Service
  - WebHttpImportBinding\_Service
  - BasicHttpStreamingBinding\_Service

- BasicHttpBinding\_Service
- BasicHttpBinding\_CoreService
- BasicHttpStreamingBinding\_CoreService

1. For the **WebHttpExportBinding** and **WebHttpImportBinding** services, update the <bindings> as follows:

```
<binding name="WebHttpExportBinding_Service" transferMode="StreamedResponse">  
  <security mode="TransportCredentialOnly">  
    <transport clientCredentialType="None">  
    </transport>  
  </security>  
</binding>
```

2. For the **BasicHttpStreamingBinding** and **BasicHttpStreamingBinding\_Core** services, update the transfer mode as follows:

```
<binding name="BasicHttpStreamingBinding_Service" transferMode="Streamed">  
<binding name="BasicHttpStreamingBinding_CoreService" transferMode="Streamed">
```

**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.

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`

# Manual installation of TotalAgility License Proxy

1. Navigate to `\\TotalAgility > Licensing > Installs` and click **Kofax.Licensing.TotalAgility.Proxy.Installer** on the Installation media.  
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\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:
  1. In the Username field, enter the user name.
  2. To specify a domain user, enter the user name in the format `Domain\User`.
  3. Enter and confirm the Password. Click **Next**.

**Note** This account must have access to TotalAgility.
7. In the TotalAgility Connection Setup window,
  1. 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.
  2. Enter the System Session ID.
  3. Click **Next**  
The system downloads the settings.
8. Click **Install** to install the License Server.
9. Click **Finish**.
10. To modify the TotalAgility license proxy information after the installation, do one of the following:
  - 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 TimeSpan.Parse, 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.

TotalAgility License Proxy enables unconnected Scan Workstations and/or other TotalAgility components to get licensing from the TotalAgility Licence server.

Note the following:

- 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. See Kofax TotalAgility License Proxy Installation.
- 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".

## Chapter 14

# Configure VRS Elite for TotalAgility

Install VRS and configure the VRS license server.

## VRS Elite installation

Use VRS in a simple VRS client and server configuration. However, for the VRS Elite software to work within a larger TotalAgility system, you must configure the scan workstations to communicate with the TotalAgility license server.

Install VRS Elite 5.1.0 server. See the *Kofax VRS Elite documentation* for more information.

**Note** When prompted to activate the license during VRS Elite server installation, click **Cancel** as you will be using the TotalAgility license server instead.

When you install VRS Elite, Kofax Software VRS - TWAIN appears in the list of scanners while scanning a document in TotalAgility. See the Kofax TotalAgility Scan Client Help for more information.

## Configure the VRS License Server

1. Click **Start > All Programs > Kofax VRS**.
2. Run **Kofax License Utility**.
3. Click **File > Select Servers**.
4. In the Select Servers window, enter valid IP addresses or server names for Primary License Server and Backup License Server.
5. Click **OK**.

**Note** You may have to use Proxy if security policies require it.

## 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 `INSTALLASSERVICE` command line option as follows:

```
msiexec /I Kofax.WebCapture.Installer.msi INSTALLASSERVICE=1
```

## 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

# 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 database.

## 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 `KofaxTotalAgilityInstallationErrorLog.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 19

# Upgrade process

You can upgrade TotalAgility from 7.0.2, 7.1.0, 7.2.0 (or any interim patches) or 7.3.0 (or any interim patches) to 7.4.0.

You can choose to upgrade [TotalAgility components](#) and [databases](#) independent of each other or upgrade [TotalAgility components including databases](#).

**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 7.4.0.

## 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 **KofaxTotalAgilityInstallErrorLog.txt** on your desktop. Fix the errors.

After upgrading TotalAgility components, if you want to upgrade databases, do the following:

1. 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.

2. Select **Upgrade Databases**.
3. To Import the Workspace package, select the **Import system Workspace package** check box.
4. 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 **KofaxTotalAgilityInstallErrorLog.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:

1. Navigate to TotalAgility Installation media and double-click **Setup.exe**.  
The User Account control window opens.
2. Click **Next**.  
The Kofax TotalAgility Upgrade window opens.
3. 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.
4. To Import the Workspace package, select the **Import system Workspace package** check box.
5. 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 **KofaxTotalAgilityInstallErrorLog.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

When upgrading TotalAgility from 7.0.2 or 7.1.0, 7.2.0 or 7.3.0 to TotalAgility 7.4.0, do the following.

1. To run scripts manually, 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 7.1.0 to 7.4.0, run the following conversion scripts.
  - 7.1.0.0 to 7.1.0.2 Conversion Scripts
  - 7.1.0.2 to 7.1.0.3 Conversion Scripts
  - 7.1.0.3 to 7.1.0.5 Conversion Scripts
  - 7.1.0.5 to 7.1.0.6 Conversion Scripts
  - 7.1.0.6 to 7.1.0.7 Conversion Scripts
  - 7.1.0.7 to 7.1.0.9 Conversion Scripts
  - 7.1.0.9 to 7.2.0.0 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

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

1. `Convert_Main.sql` on the TotalAgility database.
2. `Convert_Audit.sql` on the Audit database.
3. `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.

4. `Convert_Forms.sql` on the TotalAgility database.
5. `Convert_KLS_OnPremise.sql` on the TotalAgility database.
6. `Convert_Simulator.sql` on the TotalAgility\_Simulator database.
7. `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.
8. `Convert_DataLayer.sql` on the TotalAgility\_Documents database.
9. 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 `<C:\Program Files\Kofax\TotalAgility\Agility.Server.Web\bin>` and open **Agility.Installation.Server.Upgrade.exe.config**. Locate the `<key="UpgradeFromVersion" value="">` and update the value. The value is the TotalAgility version from which you want to perform an upgrade. For example, if you are upgrading TotalAgility from 7.3.0 to 7.4.0, set the value as follows: `<key="UpgradeFromVersion" value="7.3.0">` .
4. From the command prompt, run `Agility.Installation.Server.Upgrade.exe` by passing the `Agility.Installation.Server.Upgrade.exe <ImportWorkspacepackage>` as a parameter, such as `Agility.Installation.Server.Upgrade.exe false`. If you want to import the Workspace package, pass the `Agility.Installation.Server.Upgrade.exe true` as a parameter.
5. Ensure that no error log is created. If any errors occur, a log file called **KofaxUpgradeDatabaseUtilityError.txt** is created on your desktop. Fix those errors and repeat the above steps.
6. Start the Kofax TotalAgility Core Worker service manually:
  1. At Run, type **Services.msc** and press **Enter**.
  2. Right-click **Kofax TotalAgility Core Worker** and click **Start**.

## 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`.

**Note** If you are upgrading from TotalAgility 7.1.0 to 7.4.0 (with Reporting as a part of TotalAgility 7.4.0), 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 20

# Troubleshooting

This section describes the issues you may encounter and their resolution.

## System maps not available

If you clear the **Import System Maps** check box during installation, the system maps are not available for use.

To get the system maps post installation, import system maps from `<Install Directory>\TotalAgilityInstall\System Maps\SystemMaps.zip`.

## 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 TAServerSQLInstance 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 (`<TAServerInstance>`) service where `TAServerInstance` is the actual instance used by TotalAgility (for example, Kofax TotalAgility).

## TotalAgilityAppPool exists

TotalAgility 7.0 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:
  1. Go to **Internet Options** in IE 11.
  2. Click the **Security** tab.
  3. Click **Sites**.
  4. 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:
    1. Open the Configuration Editor of the TotalAgility site.

2. In the Section list, expand `system.webServer` and select **serverRuntime**.
3. In the From list, select **ApplicationHost.config <location path='Default Web Site/TotalAgility'/>**.
4. Set an appropriate value in bytes for **uploadReadAheadSize**.

Deepest Path: MACHINE/WEBROOT/APPHOST/Default Web Site/TotalAgility	
alternateHostName	
appConcurrentRequestLimit	5000
authenticatedUserOverride	UseAuthenticatedUser
enabled	True
enableNagling	False
frequentHitThreshold	2
frequentHitTimePeriod	00:00:10
maxRequestEntityAllowed	4294967295
uploadReadAheadSize	48000

- Or, modify the IIS main config file:
  1. Open the **applicationHost.config** file located under `C:\Windows\System32\inetsrv\config\`.
  2. 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>
```

3. 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.