Kofax TotalAgility

Administrator's Guide for Xerox MFPs

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Preface

This guide describes how to prepare a Xerox multifunction peripheral (MFP) to work with Kofax TotalAgility.

Important If you are upgrading Kofax TotalAgility, you must upgrade the client software on all MFPs to implement the latest security features.

Related documentation

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

https://docshield.kofax.com/Portal/Products/KTA/750-4kcae04o43/KTA.htm

In addition to this guide, Kofax TotalAgility includes the following documentation:

Kofax TotalAgility Installation Guide

The *Kofax TotalAgility Installation Guide* provides installation instructions and other information that helps you successfully set up Kofax TotalAgility.

Release Notes

Release notes provides late-breaking product information that may not be included in other Kofax TotalAgility documentation. The release notes are available for viewing or downloading from the Kofax website.

Training

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

Getting help for Kofax products

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

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

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

The Kofax Support page provides:

- Product information and release news

  Click a product family, select a product, and select a version number.

- Downloadable product documentation

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

- Access to product knowledge bases

  Click **Knowledge Base**.

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

  Click **Account Management** and log in.

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

- Access to support tools

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

- Information about the support commitment for Kofax products

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

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

Features

The following Kofax TotalAgility features are available with the Xerox MFP.

- Management through Devices in the Kofax TotalAgility Designer

  MFPs are able to self-register with Devices and automatically activate licenses. (This feature is optional.) You can also manually activate, deactivate, or remove MFPs whenever needed. In Devices, you can open the Web page for the MFP if Kofax TotalAgility can communicate over the network with the MFP.

- Client software on the MFP

  When the client software is installed, a button is added to the front panel of the MFP to provide access to Kofax TotalAgility features. The appearance of the front panel depends on the MFP model.

- Log on

  This feature enables you to log on to the MFP as a Kofax TotalAgility user. Logging on may provide additional options.

- Shortcuts

  This feature facilitates the sending of documents. In Kofax TotalAgility Designer, use Device Create New Job to create forms that appear as shortcut buttons on the MFP front panel.

- Scan history

  At the MFP, you can press the Scan History button on the main menu to view the scan history. If you are logged on, the history shows transactions you sent to Kofax TotalAgility from any connected device. If you are not logged on, the history shows transactions sent from all anonymous users on the device, as well as any transactions that are waiting to be sent to the server from the device.

Note Some MFP models do not include a Scan History button.

Status	Description
Pending	Submitted but not uploaded to server yet. or Ready to start scanning.
Completed	Successfully sent to destination.
Deleted	User deleted transaction from the inbox, or the administrator removed it during transaction review.

- Display confirmation messages

  You can enable confirmation messages to be sent from Kofax TotalAgility to this MFP so that users can see status information about their transactions. Messages appear on the MFP front panel when each scanned transaction reaches the server, or if a problem occurs. See the Devices Help for instructions on setting up confirmation messages.

- Language support

  At the MFP front panel, you can specify the language. If the language specified is not supported by Kofax TotalAgility, English is used by default.

- Form tields

  You can enter values for form fields at the MFP. When you define forms in Devices, you can enter default values into fields for these shortcuts. The data is also validated for an appropriate type and length. You can also customize the validation and field lookup options.

- Customized validation and lookup options

  You can customize validation and a variety of field lookup options for forms in the Kofax TotalAgility Designer. For more information, see Kofax TotalAgility Help.

- Device logging

  Log messages from the device are stored in the Kofax TotalAgility database. Download the log from Devices by going to the General tab for the device and clicking Download Log.

- Support for internal browsers

  Kofax TotalAgility supports either of the embedded browsers used by Xerox MFPs, the newer Webkit browser or the original ANT Galio S12 browser.

- Help

  Help is available at the MFP touch screen. Users can press the question mark or Help button on the touch screen to view information about the screen.

System requirements

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

Kofax TotalAgility uses the Xerox Extensible Interface Platform (EIP) to communicate with the Xerox MFPs. Only Xerox MFPs supporting the Extensible Interface Platform (EIP) and with Xerox Widgets

Version Revision 2 or higher can be used. The latest firmware and EIP version have to be installed on the Xerox MFPs.

To enable EIP on the MFP, follow the instructions provided by Xerox:

1. Create a self-signed certificate or install your own certificate.

    Note When using HTTPS on Xerox MFPs with firmware version 073.xxx.xxx, add a Kofax TotalAgility server certificate to the device with the exact server name.

2. Enable SSL.
3. Enable Extensible Service Setup, which is under Properties in General Setup. Make sure you enable the Extensible Services Browser.

Although you must enable SSL on the MFP, using SSL is not required to connect to Kofax TotalAgility. However, connecting to Kofax TotalAgility through SSL is recommended for data security.

Preparing for registration

Before registering Kofax TotalAgility with the MFP:

*   Install Kofax TotalAgility.
*   Download the Xerox client software from Devices.
*   Verify that all Xerox MFPs connected to the same Kofax TotalAgility have the same user name and password.
*   Use low-resolution grayscale images to optimize performance. Resolutions greater than 200 dpi may adversely affect performance.

Registering the MFP with Kofax TotalAgility

To enable the MFP to communicate with Kofax TotalAgility, run a client registration program to register theKofax TotalAgility client software on the MFP and provide the URL so the MFP can make the initial call to the Kofax TotalAgility when the Kofax client software is started on the MFP.

The KofaxXeroxRegistration.exe program is a standalone Windows application that can be run from any computer on or outside the network where the MFP is located. Follow the instructions to register a Kofax TotalAgility or connect to a different Kofax TotalAgility.

After registration, a Kofax button should appear on the MFP front panel. Depending on the model and configuration, you may need to press a Services or Custom Services button to view the Kofax button.

Registering Kofax TotalAgility with the Xerox MFP

1. Go to the `registration` subfolder in the folder where you downloaded and extracted the client software, and run KofaxXeroxRegistration.exe.
    The **Xerox Registration Client** window opens.
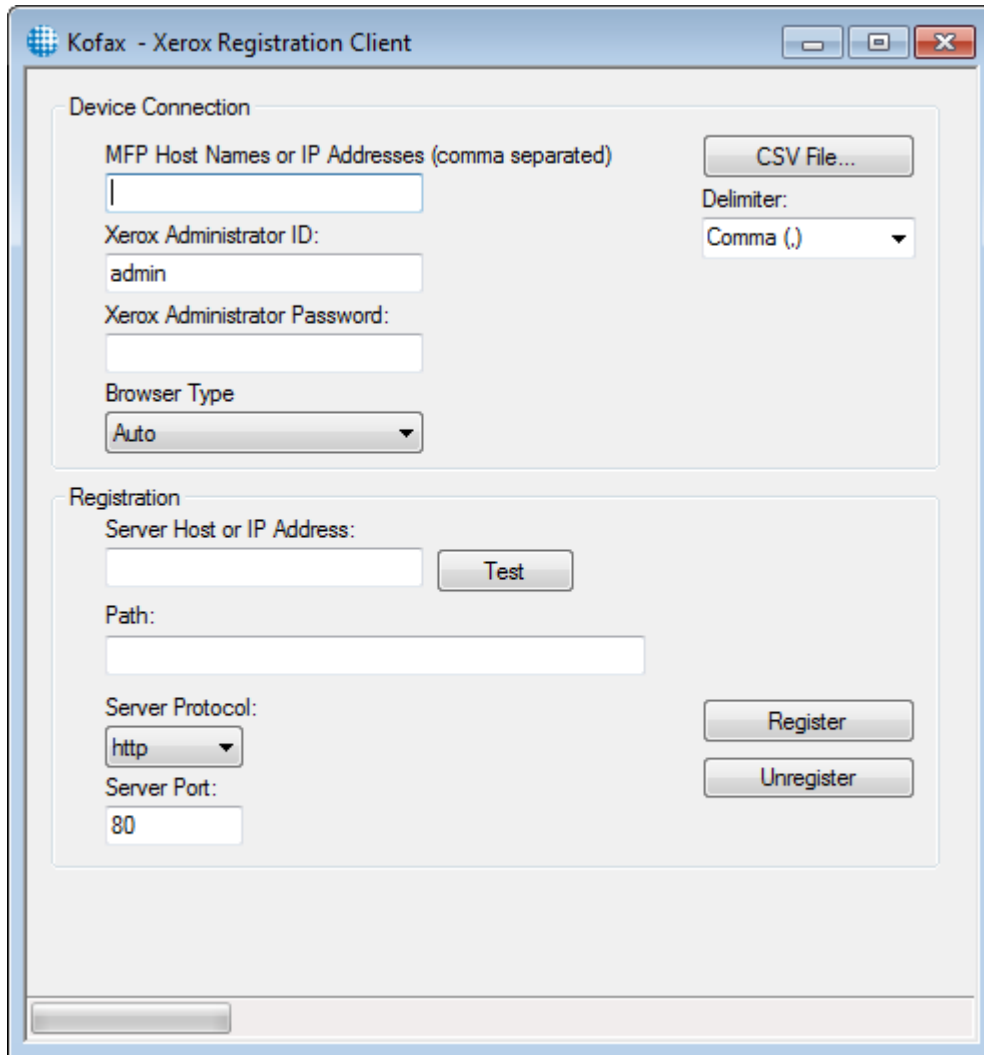
2. In the **Device Connection** section, provide information for the MFPs you are registering, including the host name or IP and the administrator user name and password for the MFP. To register multiple MFPs at one time, use one of the following options.

   Important To register multiple MFPs, the administrator credentials must be the same on every MFP.

   • Enter MFP host names or IP addresses separated by commas into the **MFP Host Names or IP Addresses (comma separated)** field.
   • If you have a file that is generated by MFP management software, select the character used to separate each entry (a comma, tab, or semicolon) in the **Delimiter**. Make sure each MFP is on a separate line and the IP address or host name is the first entry. In this example, the IP address, host name, MAC address, and model name are delimited by commas.

   ```
   173.21.45.23,purchasing01,11-22-33-44-55-66,Purchasing 1
   173.21.45.24,purchasing02,11-22-33-44-55-67,Purchasing 2
   173.21.45.25,purchasing03,11-22-33-44-55-68,Purchasing 3
   173.21.45.26,purchasing04,11-22-33-44-55-69,Purchasing 4
   ```

```
173.21.45.27,purchasing05,11-22-33-44-55-70,Purchasing 5
```

If the first entry is not an IP address or host name, correct it before attempting to import the file.

- Create a text file to import with all your IP addresses or host names with a line break after each, as shown in the following example. If you use this method, it does not matter what is selected in the **Delimiter** field.

```
173.21.45.28
173.21.45.29
173.21.45.30
173.21.45.31
173.21.45.32
```

If you have a file to import, click **CSV File** and select the file. The registration program registers each MFP in order until all of the ones listed in the file are registered.

3. In the **Xerox Administrator ID** and **Xerox Administrator Password** fields, enter administrator credentials for the specified MFPs.

4. In the **Browser Type** field, select the type of browser used by the MFPs.

Select **Auto** unless you know the type of browser supported by the MFPs. If you select **Auto**, the ANT Gallo S12 is selected first. If it is not supported by the device, the Webkit browser is used.

If you select a browser that is not supported by a device, a message appears when you click **Register**.

5. Complete the **Registration** section as follows:

   a. Enter the host name or IP address of Kofax TotalAgility.

   b. To verify that the host name or IP address is correct, click **Test**.
   A window indicates whether the connection is successful or not. Click **OK** to close the window.

   c. If Kofax TotalAgility uses a virtual directory, enter the name of the directory in the **Path** field. For example, if you are using the default path for an on-premise deployment of Kofax TotalAgility, enter TotalAgility. If you are using Kofax TotalAgility in a Software as a Service environment, leave the field blank.

   d. Select the type of connections in **Server Protocol** field, either **http** or **https**.

6. Click **Register**.
   When the registration process is completed, the **Registration Results** window lists successful deployments as well as any errors. Right-click and copy one or more selected items or all failed items.

7. When you finish viewing the **Registration Results** window, click **OK** and close the client registration program.

Registering a different Kofax TotalAgility installation

1. Go to `registration` in the folder where you downloaded and extracted the client software, and run KofaxXeroxRegistration.exe.
   The **Xerox Registration Client** window opens.

2. Verify that the **Device Connection** section contains the information for the MFP.

3. Click **Unregister**.

4. Complete the **Registration** section with the new information and click **Register**.

5. When you receive the successful activation message, close the client registration program.

The MFP is now ready to use with Kofax TotalAgility. The Kofax button appears on the network scanner main menu. Depending on Devices settings, pressing the Kofax button causes the MFP to self-register and license itself, and connect to the default device profile if one is defined. See Devices Help for information about self-registration and default device profiles.

Device profiles updates

When a device profile associated with an MFP changes, the changes are reflected on the front panel of the MFP when it polls Kofax TotalAgility. This poll occurs when the Kofax TotalAgility client software button is pressed. To ensure the MFP contains the most current device profile information, do the following:

- Make changes to device profiles when there is low user activity, such as at night.
- Set the MFP inactivity timeout to a short period, such as one to three minutes, so that the next user who presses the Kofax button retrieves the latest profile.

Optimizing the image scan quality

Kofax TotalAgility supports configuring several scan settings for the Xerox MFPs.

1. In Devices on the **Settings** - **Advanced** tab, locate the **mfp.xerox.properties** property.
2. Specify the scan settings as needed. The descriptions provide instructions.
3. Save your changes.

    The changes are applied the next time a job is scanned. You do not have to restart Kofax TotalAgility for the changes to take effect.

Changing the scan mode

By default, Kofax TotalAgility uses Xerox HTTP(s) Scanning. You can change to Xerox FTP Scanning if you are unable to use HTTP/HTTPS. In Kofax TotalAgility Designer, enable the Xerox FTPFetch system task, and in Devices, create a new advanced setting to change the scanning mode. Refer to the Devices Help for instructions on creating new advanced settings and create the following settings. For each setting, specify mfp.xerox.properties as the namespace.

Property	Description and Settings
http.scan.enabled	Enable Xerox HTTP(s) Scanning. - true: Use Xerox HTTP(s) Scanning - false: Use Xerox FTP Scanning
ftp.server.host	FTP server host used by Xerox device to send scanned image files. Note: a blank value will stop polling if no Xerox devices are used.
ftp.server.lock.timeout	FTP lock timeout, expressed in minutes. We recommend that you do not change the value unless instructed to do so by Technical Support personnel.

Property	Description and Settings
ftp.server.max.job.processing.attempts	Number of attempts to process a job before moving it to the failed jobs folder, default=5. Note: in a Kofax TotalAgility cluster configuration this would be per node so total attempts could be higher.
ftp.server.password	FTP user password.
ftp.server.path	Path on FTP server host where Kofax TotalAgility files are stored, must start with /.
ftp.server.polling.initial.delay.ms	FTP polling timer initial delay in milliseconds, default = 10000
ftp.server.polling.interval.ms	FTP polling timer interval in milliseconds, default = 120000
ftp.server.username	FTP user name

Note If you are upgrading from a previous version of Kofax TotalAgility, the FTP properties still appear in the Advanced tab. You still need to create the http.scan.enabled property.

Additional information

The following is additional information which may be of interest to you when working with Kofax TotalAgility and the MFP.

Handling of unsupported paper sizes

If a paper size defined in Devices is not supported by the MFP, the scanned image will be the largest paper size in the feeder. If the original image is smaller than the largest paper size, the image is kept at the original size with white space surrounding it.

Handling of incomplete jobs

A job is flagged as failed if it is incomplete for a certain period of time. By default, this is 60 minutes. You can change this duration on the Settings - Advanced tab in Devices. In the mfp.xerox.properties namespace, change the server.max.job.age.mins setting.

Image preview

Xerox MFPs can display a preview of the image in the Scan Complete window.

Enable the feature in the Devices. In the Advanced - Settings tab, set mfp.scan.preview in the mfp.xerox.properties namespace to true.

The Scan Complete window shows the document you scanned and enables you to process it. Press < or > to move to the previous or next page of the document. Then use these buttons to process the document:

• Press OK to send this scan job and return to the main menu.

- Press Cancel if you do not want to send this scan job.

If the client is left inactive and times out at the Scan Complete window, the job completes automatically and redirects to the window indicating that the job has been sent. If the client remains inactive and times out again, the client closes.