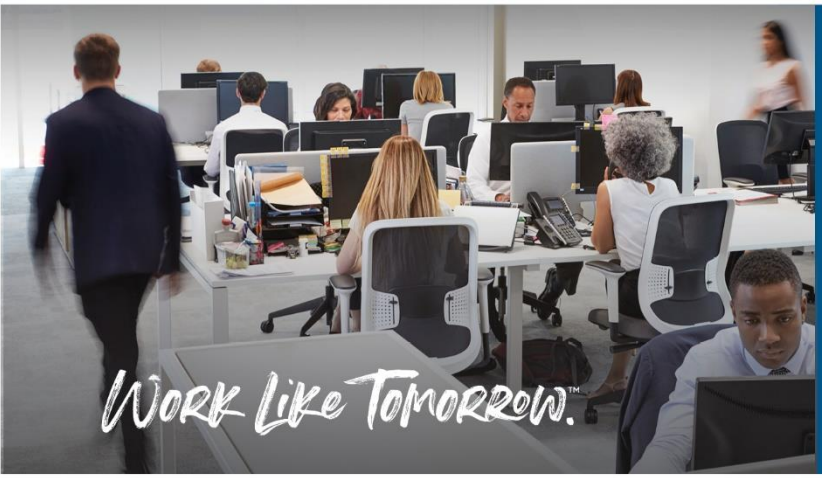
KOFAX



Kofax OmniPage Server

Admin Console User Guide

KOFAX

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Introduction

This document describes the administrative tools and features of the OmniPage Server Administration Console. OmniPage Server (OPS) is a solution that provides document conversion services aiming at improved scalability and reliability. It functions with the help of a web service called Master. OPS is an application service solution built using conventional enterprise architectural components and approaches, while still offering a high level of availability, scaling functionality.

Concepts, Terms and Abbreviations

Optical character recognition (OCR)

OCR is the process of translating digital images to machine-encoded text.

File conversion

File conversion is the process of transforming information represented in a source file as specified by its file format into another file using a representation specified by another file format.

Note: File conversion might result in information loss if the destination file format cannot represent everything represented by the source file format.

Document conversion

In this document, document conversion refers to the process of transforming a set of input documents into a set of output documents. This may involve OCR.

Conversion job (or simply job)

Jobs are the units of work for OPS. Jobs encapsulate everything related to a single document conversion.

Key Features

The OPS Administration Console is a web-based administration tool for the services and resources of the OmniPage Server instance.

The following key features are included in the current release:

- Management of system related services
- Performance usage monitor
  - Visualize current and historical data
  - Date period filter options for historical data

- Conversion job and processed page statistics with:
  - Aggregated data visualization
  - Aggregation criteria setting
- System messages
  - Filtering options to list system messages
- System configuration
- Licensing administration
  - Current state of installed licenses
  - Reporting about license usage

Authentication

The Administration Console uses two types of authentication. In case of installation in a domain environment, the application is secured by Windows Security. Outside a Windows domain, it is accessible for manually registered users.

Domain Authentication

When OmniPage Conversion Server is installed in Windows domain environment, Windows Authentication and ASP.NET Impersonation should be enabled. In this case the application uses standard Windows login to authenticate administrators.

Administrator users are registered during the installation process and are stored in the web.config file. After installation administrators or groups of administrators can be defined by semicolon- or comma-separation.

```
<configuration>
    <appsettings>
        <add key="adminusers" value="domain\user">
        <add key="admingroups" value="domain\group">
                    …
    </appsettings>
</configuration>
```

Form Authentication

In a workgroup environment, where Windows authentication is not applicable, the OPS Administration Console provides form-based authentication.

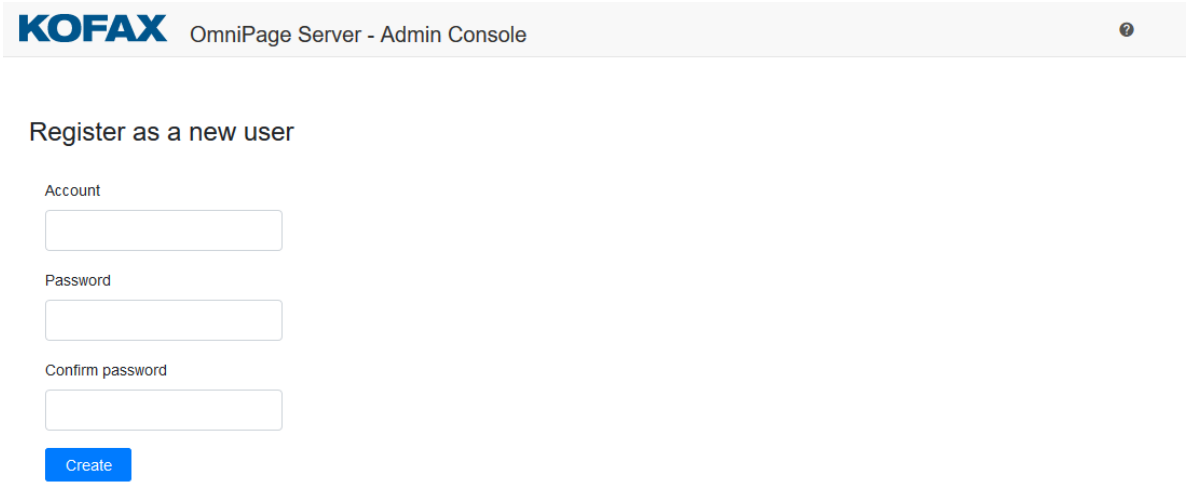
First Use

Before you can use the Administration Console for the first time, you need to register the first user.

Registration of the first user

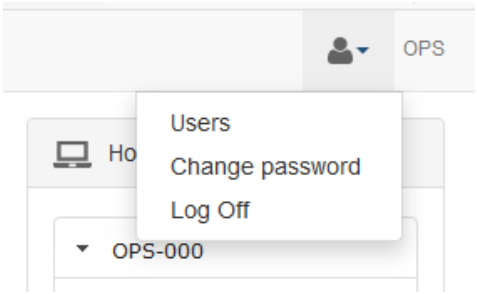
Specify a unique username and a password (must be at least 3 characters with at least one numerical character).

After you have registered at least one user, you can log in and start working in the Console.



User management menu

Choose the **User management** menu to access user administration functions. The following choices are offered:



Users

To add or remove further administrators, click the **Users** menu item. This page shows a list of registered administrator users. You can register additional users here or remove existing ones. All registered administrators have the right to manage the list of registered users.

Change password

To change your password, log in and then select the **Change Password** menu item. Passwords must be at least three characters long and must contain at least one numerical character.

Log off

When an administrator finishes the work with Admin Console, with clicking the **Log Off** menu item, the user exits the application. A new sign in process is required for further usage.

Reset administrator list

Administrator login information is stored in a specified UserStore.dat file, which is stored in the application data folder under user profile directory of service user. The location of file is typically the following:

%SystemDrive%\ProgramData\Kofax\OmniPageServer\UserStore.dat

With the deletion of the UserStore.dat file, the user management is set to a default state. You can continue working with the Admin Console by registering the first administrator.

Functions of the Administration Console

After installation of OCS, the Administration Console is available in a web browser under the following URL: http://{server}/omnipage.server.adminconsole/

The main page is separated into three major parts:

- Top pane: contains the title of the application and the user related functions or information for logged in users.
- Left pane: contains a navigation menu to select different pages of the Administration Console
- Central pane: the working area related to the selected page.

After starting work with the Administration Console, the **Dashboard** is loaded by default.

Dashboard

The **Dashboard** enables you to check and modify the running state of related hosts or services and provides information on performance usage.

Highlighted performance counter values

You can follow the working and health status of the system through four highlighted performance counter values:

- The instantaneous free capacity of hard drives,
- Memory usage,
- Processor usage,
- Current number of items in processing queue.

These major parts of the system are centrally placed in colored boxes.

Historical values of performance counters

Tendencies and performance value changes are displayed in a graph control. This graph contains the performance values of a pre-defined time period in a gradual scale.

Select displayed performance counter

The performance graph can display values on one performance counter. Select the counter by clicking the performance counter box. Afterwards, counter related data is loaded into the graph.

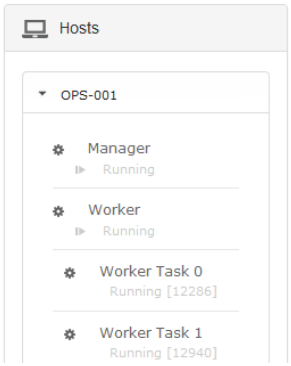
Filter criteria for performance counter values

The graph contains performance information about a specified time period; the dates can be set through filtering controls above the graph.

If you click the **Clear** button, the control displays empty values. Once the date values are specified, click the **Refresh** button to update graph content according to the specified filter values. When the **Dashboard** is loaded, the previous two hours are filtered by default.

Host and service manager

OCS is scalable through installing converter components on separate host machines. The Administration Console supports management and tracking of system related hosts and services. On the right-side menu of the **Dashboard,** you can select hosts and check the state of services running on the selected host.



Host selection

In case of extended system architecture, the host can be selected by clicking on the host control header. The control is then extended to display services installed on the selected host and values of performance controls (boxes and graph) will be updated with host related performance data simultaneously.

Status of services

This control provides information about the status of installed services. In case any service is stopped, an exclamation mark warns the user about an incidental malfunction in the host control header.

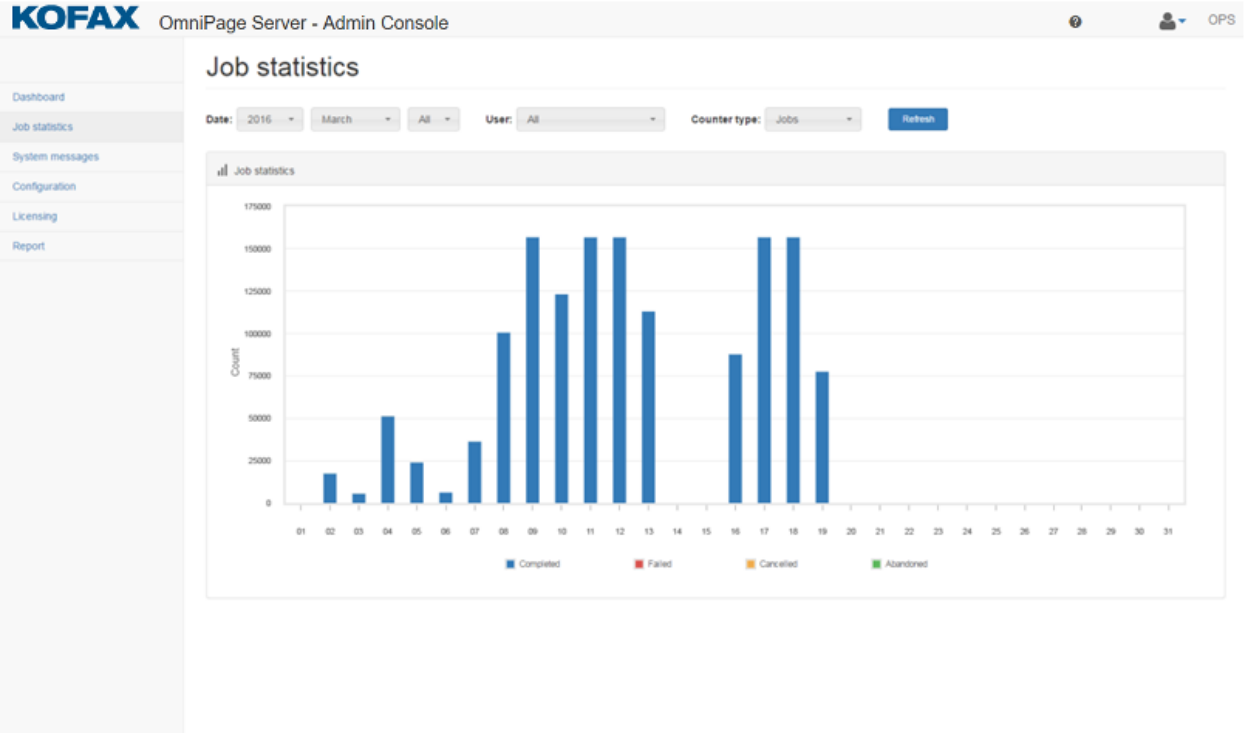
Count of converted pages

Count of converted pages related to a Worker Task can be found in the **Worker Task** section enclosed in square brackets.

Restart service

You can both follow and manage the status of services. Services can be restarted as deemed necessary.

Job statistics



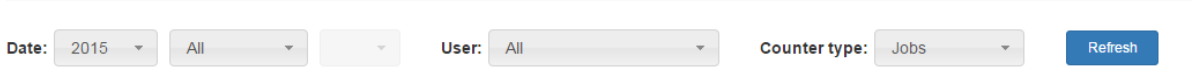
After clicking the **Job statistics** menu item in the left pane, statistical information about processed jobs and converted pages can be queried.

Display job statistics

Aggregated processing information is displayed in a centrally placed multicolumn diagram control. Aggregation depends on preset aggregation criteria and it can be filtered by year, month and day. Aggregated processing values are displayed in the graph columns grouped by different conversion statuses distinguished by colors. Quantitative data is displayed in a tooltip after hovering the mouse over a selected graph column.

Aggregation criteria

Aggregation criteria and user filter can be set through filtering controls above the graph.



Aggregation can be filtered with variables:

- In case year is set, the graph contains only statistical data by the month of the selected year.
- After setting year and month, the displayed data is grouped by the day of the selected month.
- With setting the year, month and day, the queried values are displayed by the hours of the day.

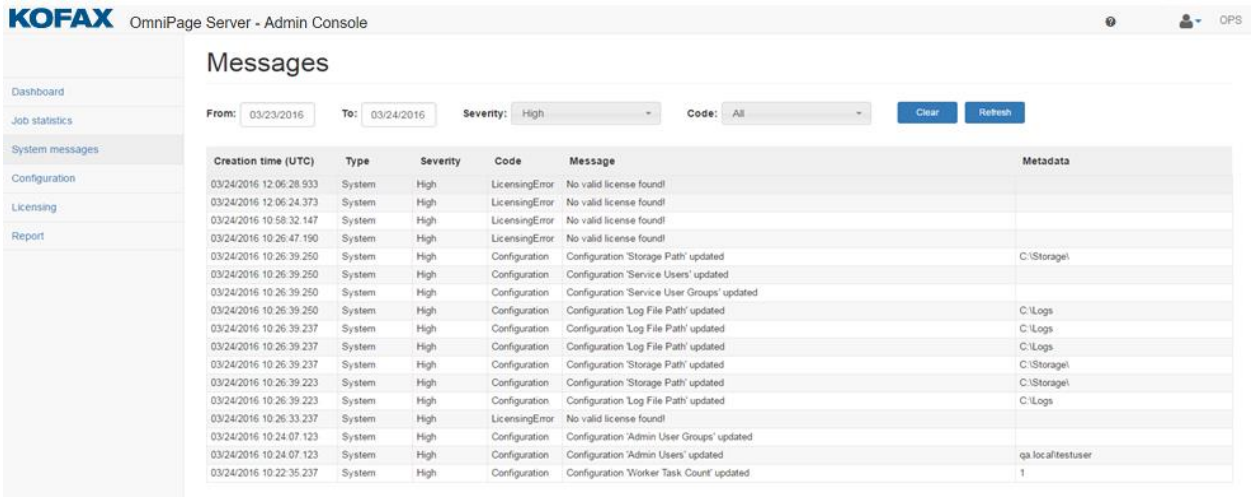
You can change between job and page processing information through the **Counter type** combo box.

Processing information can be filtered by users with the selection of any item in the **User** combo box.

The **Refresh** button updates the graph control according to specified aggregation criteria.

By default, the graph displays processing information of the current day.

System messages



A sophisticated logging component is an important part of the system. To inform administrator users, the system generates and stores messages if any types of events occur. The stored messages are listed on the **System messages** page.

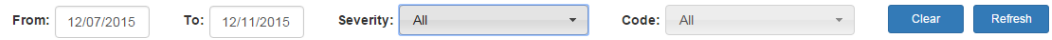
Messages have the following details:

- Creation date
- Type: system, non-system

- Severity: low, medium, high
- Code: type of messages, for example service, error, job, storage, configuration, licensing
- Message: text of message
- Metadata: additional information from the sender

Filtering the message list

Message queries are parameterized with date period, severity and code attribute. Filtering can be performed by using the related controls above the message list.

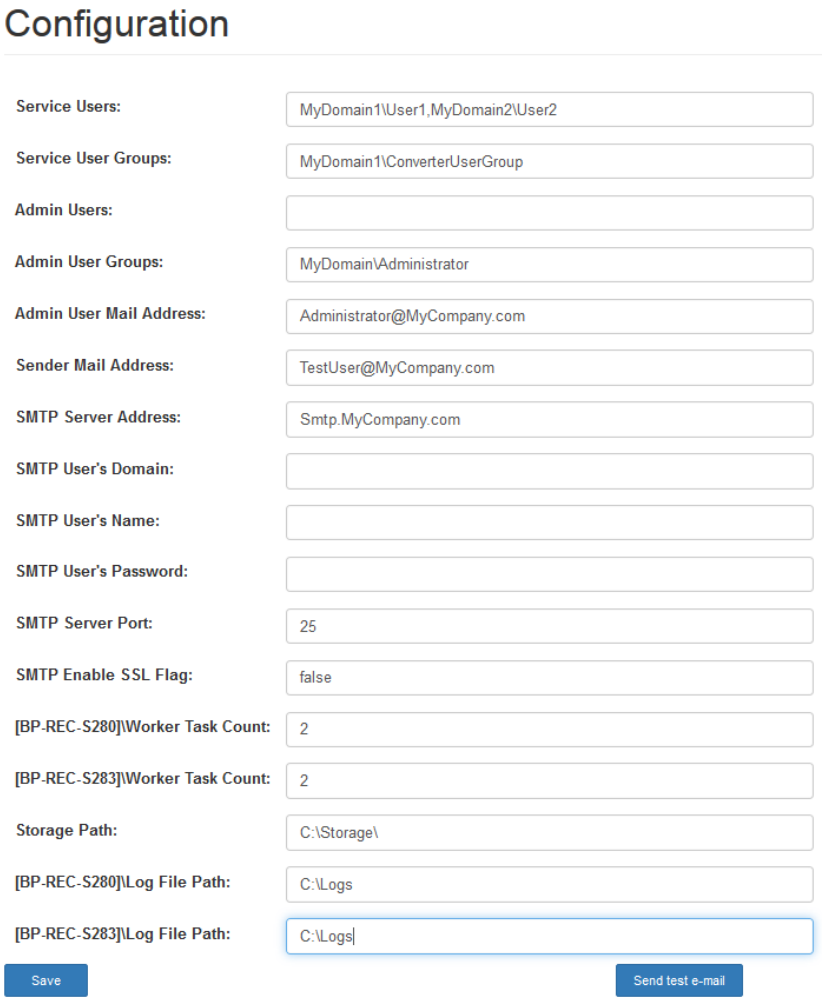


The **Clear** button deletes filtering control values, the **Refresh** button updates the message grid according to the filtering criteria.

After navigating to this page, the list is filled with high severity items of the current day by default.

Configuration

You can configure the OmniPage Server on the **Configuration** page of the Administration Console. The following parameters can be set:



Service Users

Comma-separated list of authorized domain users, who can access the OmniPage Server WEB API to perform conversions.

For example domain1\user1,domain2\user2

Service User Groups

Comma-separated list of Active Directory Groups whose members are authorized to access the OmniPage Server WEB API to perform conversions.

For example domain1\group1,domain2\group2

Note: Specifying a non-existent group degrades the performance.

Admin Users

Comma-separated list of authorized domain users, who can access the Administration Console UI.

For example domain1\user1,domain2\user2

Admin User Groups

Comma-separated list of Active Directory Groups whose members are authorized to access the Administration Console UI.

For example domain1\admingroup1,domain2\admingroup2

Admin User Mail Address

The email address of the administrator user; the system sends an email to this address in case of an emergency or when the expiration date of the licenses approaches.

Sender Mail Address

OmniPage Server system will send a message on behalf of this user to avoid spam filters.

SMTP Server Address

The machine name or IP address of the host used for SMTP transactions.

SMTP user configuration:

Specifies the user credential to use for authentication to the SMTP mail server. If you leave it blank, the server tries to authenticate with the user who runs the service.

SMTP User's Domain

SMTP User's domain name.

SMTP User's Name

The username of the server.

SMTP User's Password

Password of the SMTP server user. This password will be stored in the database.

SMTP Server Port

The port used for SMTP transactions.

SMTP Enable SSL Flag

SMTP Server enable SSL flag. Its value can be true or false.

Worker Task Count

The count of the worker tasks. It is limited due to memory size and processor count of the current machine.

Local Storage Path

The file storage of the conversion related documents. It can be a local folder of the Service machine or a network share.

Log File Path

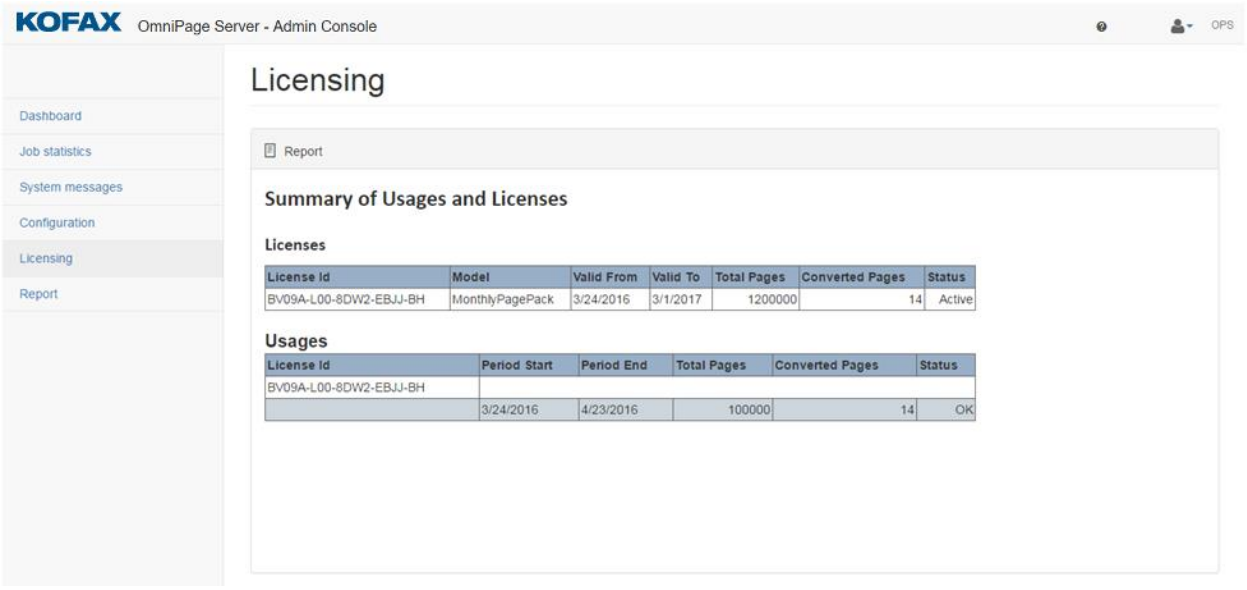
The path of the log files.

Clustering Server Name

The name or IP of the clustering server, it is used for Failover Clustering or Load Balancing.

Licensing

Current status of installed licenses queried on the **Licensing** page.



OmniPage Licensing Tool is required to license OPS. It is installed along with the Master components of the OPS.

Activate license with internet access

1. Start OmniPage Licensing Tool on your runtime machine.
2. Select File/Download... / Enter your license key and press Download
3. Your license will appear in the Licenses panel.
4. Select your license file and click on the Functions/Activate menu item to activate your license.
5. If the license has been activated successfully, OK is displayed next to the product name.
6. OPS is functional.

Download and Activation without Internet Connection

If your development computer does not have an internet connection, license download and activation can be performed manually. To do this, use a computer with internet connection and proceed as follows:

1. Go to the following link: http://licenses.kofax.com/csdkactivation/download.aspx
2. Enter your license keys and download the license files.
3. Move your downloaded license file(s) to the target computer (the one where you have installed the 'Master' component of the OPS).

4. Run OmniPage Licensing Tool on the target computer (Start > All Programs > Kofax > Licensing > OmniPage Licensing Tool).
5. Load each license file separately with the File > Load… menu command.
6. Use the File > Prepare License for Manual Activation… menu command to save your licenses in a .zip file.
7. Move your saved file back to the other computer with Internet connection.
8. Go to the following link: http://licenses.kofax.com/csdkactivation
9. Follow the instructions on that web page.
10. Download/Save the received .lcxz file to a portable media and move it to the target computer.
11. Run OmniPage Licensing Tool on the target computer again.
12. Import the license set with the File > Load… menu command.
13. As a result, you should see your license(s) in the Licenses window of the OmniPage Licensing Tool. The activation date(s) should be filled in.

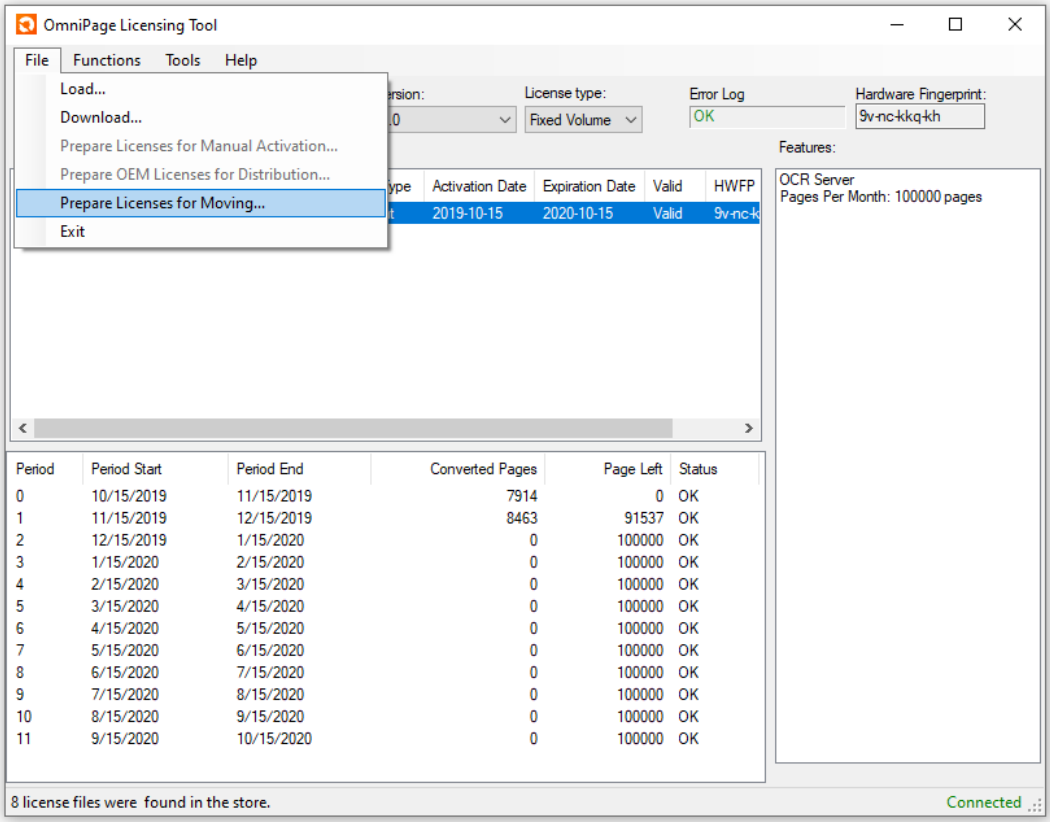
    Once you have downloaded and activated all your license keys, you can check your licenses in the Admin Console of OPS.

Moving licenses to another machine

Moving licenses is also possible, for example in case of a hardware upgrade. To do this, your users must use the Licensing Tool.

Follow these steps to move licenses:

1. Start the Licensing Tool and select File > Prepare Licenses for moving...

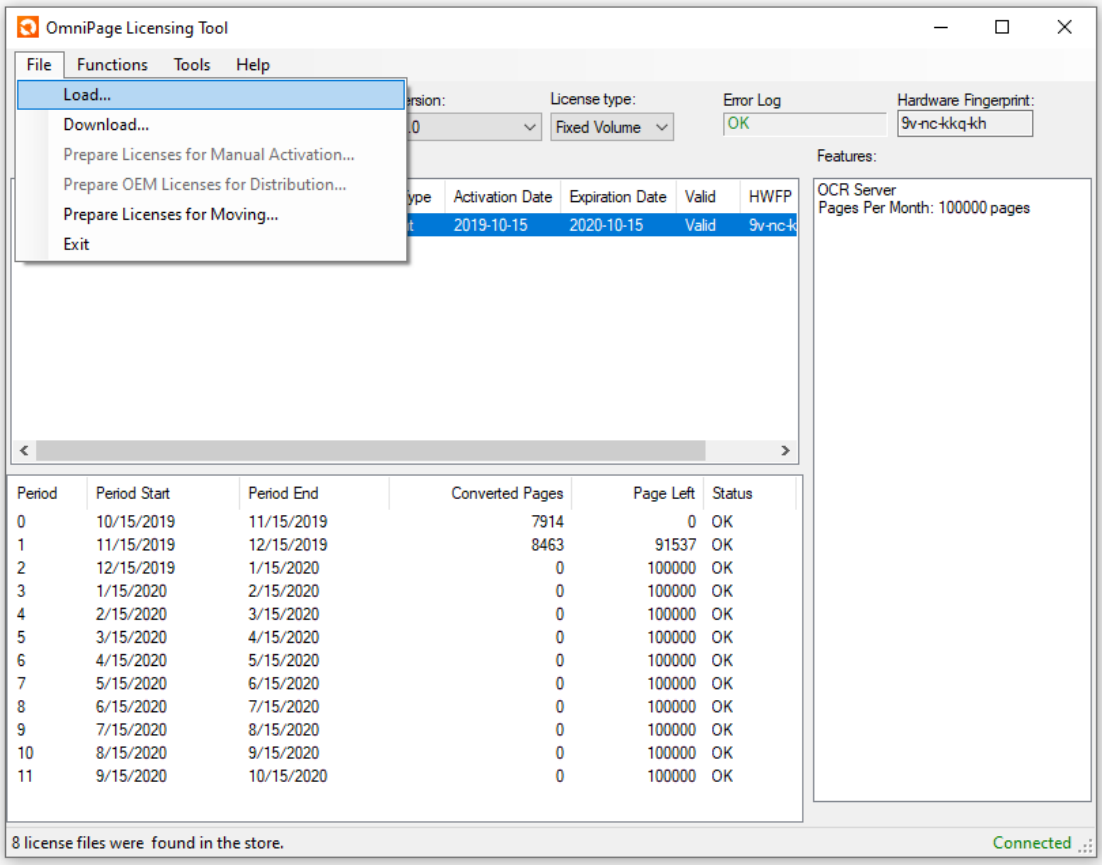


2. Provide a name for the .lcxp file pack in the Export License Files To dialog. Click Save.
3. Take the .lcxp file to the new computer.

The remaining steps depend on whether the new machine of your user has network connection or not.

With internet connection

4. Select File > Load... to load your license pack.



Without internet connection

4. Select File > Load... to load your license package.

   License package file will be updated with the new machine's information.

5. Move the updated package to the computer with internet connection.

6. Go to the following link: http://licenses.kofax.com/csdkactivation and upload the updated package file.

7. Download/Save the received .lcxp file and move it to the target computer.

8. Start the Licensing Tool and import the downloaded .lcxp license package with the File > Load… menu command.

   As a result, you should see your moved licenses in the Licenses window.

Report

OmniPage Server provides customers with downloadable monthly reports that deliver information about their licensing status and vital statistics on their document conversions.

Safekeeping these reports is recommended to comply with licensing requirements.