



Kofax ReadSoft Invoices Web API Install Guide

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KOFAX

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Chapter 1

Introduction

Kofax Invoices Web API makes many of the API methods that are available in Kofax Invoices 6.2.0 or later available to other applications.

This guide covers the installation and configuration of the Invoices Web API in connection with Kofax Invoices 6.2.0 or later.

Related documentation

A full set of the documentation can be found online [here](#):

In addition to this guide, the Kofax ReadSoft Invoices documentation set contains the following relevant documents:

ReadSoft Invoices Installation Guide ([ReadSoftInvoicesInstallGuide_EN.pdf](#)) provides information on how to install ReadSoft Invoices .

ReadSoft Invoices System Configuration Guide ([ReadSoftInvoicesTechnicalSpecifications_EN.pdf](#)) provides some information concerning system requirements.

The Web API Developers Guide ([ReadSoft_Invoices_WebAPI_Dev_Guide.pdf](#)) provides information and examples on how to use the available API methods with other applications.

Getting help with Kofax products

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

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

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

The Kofax Knowledge Base provides:

- Powerful search capabilities to help you quickly locate the information you need.

Type your search terms or phrase into the **Search** box, and then click the search icon.

- Product information, configuration details and documentation, including release news.

Scroll through the Kofax Knowledge Base home page to locate a product family. Then click a product family name to view a list of related articles. Please note that some product families require a valid Kofax Portal login to view related articles.

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

Click the **Customer Support** link at the top of the page, and then click **Log in to the Customer Portal**.

- Access to the Kofax Partner Portal (for eligible partners).

Click the **Partner Support** link at the top of the page, and then click **Log in to the Partner Portal**.

- Access to Kofax support commitments, lifecycle policies, electronic fulfillment details, and self-service tools.

Scroll to the **General Support** section, click **Support Details**, and then select the appropriate tab.

Chapter 2

Prerequisites

The following items must be done before installing Kofax Invoices Web API:

- Kofax Invoices 6.2.0 or later must be installed on the server. See *Kofax Invoices Installation Guide* for more information.
- An Invoices database must be created and available to the server. This can be on the server on which Kofax Invoices 6.2.0 is installed, or it can be located on a different server. For the sake of this manual, the name of the example database is INV_60. See *Installing and Configuring Microsoft SQL Server* for information on how to do this.
- A user must be created on the server where Invoices Web API is installed. The example user for this guide is *InvoicesService*. See below.
- A SysAdmin resource needs to acquire and install an SSL certificate on the server where Invoices Web API is installed. The name of the certificate should be *InvoicesServiceCert*. See below.
- Ensure the server has a supported operating system:
 - Windows 7 SP1 or later
 - Windows Server 2008 R2 SP1 or later

Create the InvoicesService user for the Web API

The user name defined here is used later in the installation process when the components are configured. *InvoicesService* is the name specified in the following example.

1. Open the **Computer Management** console on the computer where Kofax Invoices Web API is installed.
2. In the navigation pane to the left, expand **Local Users and Groups**, right-click **Users**, and select **New User**.
3. Type *InvoicesService* in both the **User name** and **Full name** boxes.
4. Specify and confirm the password for the user.
5. Deselect **User must change password at next logon** and select **Password never expires**.
6. Click **Create**.

The system adds the *InvoicesService* user to the list of users.

Acquire and install an SSL certificate for the web sites

The websites created by the installation process require an SSL certificate in the domain to be able to access the web sites created by the installation process in the domain. If the person installing the

Web API does not manage SSL certificates for the domain, they need to ask the person who does to acquire the certificate and install it on the server. The name of the certificate for the example in this manual is *InvoicesServiceCert*.

Enable WebSocket protocol

The WebSocket protocol must be activated on the machine where Web API is running. The operating system determines how it is activated.

For example, do the following to activate the WebSocket Protocol on Windows Server 2012:

1. Open the Server Manager and click **Manage > Add Roles and Features** to the right on the screen.
2. Select **Role-based or feature-based installation** and click **Next**.
3. Select the appropriate server (your server is selected by default), and click **Next**.
4. In the **Roles** tree, select **WebSocket Protocol** under **Web Server (IIS) > Web Server > Application Development** and click **Next**.
5. If no additional features are needed, click **Next**, and then click **Install**.
6. When the installation is complete, click **Close to exit the wizard**.

Chapter 3

Web API installation instructions

The core components listed in the system requirements are installed first if they are not found on the computer. Invoices Web API is then installed. It consists of three components that come up automatically one after the other in the installation.

- Invoices Identity Server
- Web API Server
- Invoices Web Client

Complete the following steps to install the various parts.

1. Download the Invoices Web API installation package, *InvoicesAPISetup.exe*, from the Kofax customer portal. You will need to log in to access the file.
2. Double-click the file to start the installation.
3. Core components are installed first if they are not found on the system. Click **Install** and **Close** or **Finish** to install each pre-component.
4. Continue with the next section.

Install the Invoices Identity Server

1. Click **Next** when the **Welcome to the Invoices Identity Server Setup Wizard** dialog displays.
2. In the **Destination Folder** dialog, specify where you want to install the identity server (or accept the default location), and click **Next**.
3. Specify the following settings in the **Database settings** dialog and then click **Next**.
 - The name of the server where the database is located (use a period "." if the installation is on the same computer).
 - The database instance name (if applicable)
 - The name of the database that was created for this purpose (*INV_60*, for this example).
4. Specify the following settings in the **Web site** dialog and then click **Next**.
 - The appropriate **Port** setting (2102 is used in this example).
 - Under the **Certificates** box, select the **IdentityServerCert** web certificate that was created previously.
 - Specify the desired location for the associated log, if different than the default location.
 - Ensure **Create website** is selected.
5. In the **WebAPI and Web Client settings** dialog, replace "localhost" for both **WebApi server url** and **Web Client url** with the corresponding IP address of the server so that the sites can be accessed from other computers.

6. Specify the following settings in the **User credentials** dialog and click **Next**.
 - **Domain name** (if the user is found on a domain that is different than the server on which you are installing the identity server)
 - **User name** - the user that was created previously above (*InvoicesService*, in this example)
 - **Password** - the password associated with the specified user account.
7. Click **Install**.
8. Click **Finish**.
9. Continue with the next section.

Install the Web API Server

1. Click **Next** when the **Welcome to the Web API Server Setup Wizard** dialog displays.
2. In the **Destination Folder** dialog, specify where you want to install the web API server, and click **Next**.
3. Specify the following settings in the **Database settings** dialog and then click **Next**.
 - The name of the server where the database is located (use a period "." if the installation is on the same computer).
 - The database instance name (if applicable)
 - The name of the database that was created for this purpose (*INV_60*, for this example).
4. Specify the following settings in the **Web site** dialog and then click **Next**.
 - The appropriate **Port** setting (54051 is used in this example).
 - Under the **Certificates** box, select the **IdentityServerCert** web certificate that was created previously.
 - Specify the desired location for the associated log, if different than the default location.
 - Ensure **Create website** is selected.
5. In the **Identity Server and Web Client settings** dialog, replace "localhost" for both **Identity server url** and **Web Client url** with the corresponding IP address of the server so that the sites can be accessed from other computers.
6. Specify the following settings in the **User credentials** dialog.
 - **Domain name** (if the user is found on a domain that is different than the server on which you are installing the identity server)
 - **User name** - the user that was created previously above (*InvoicesService*, in this example)
 - **Password** - the password associated with the specified user account.
7. Click **Next**.
8. Click **Install**.
9. Click **Finish**.
10. Continue with the next section.

Install the Kofax Invoices Web Client

1. Click **Next** when the **Welcome to the Kofax Invoices Web Client Setup Wizard** dialog displays.
2. In the **Destination Folder** dialog, specify where you want to install the web client, and click **Next**.
3. In the **Kofax Invoices Web Client settings** dialog, replace "localhost" for both **Web API url** and **Identity Server url** with the corresponding IP address of the server so that the sites can be accessed from other computers. Ensure that **Create website** is also selected. Then click **Next**.
4. Click **Install**.
5. Click **Finish**.
6. Click **Close**.

Chapter 4

Post-installation configuration

Perform the following actions after Kofax Invoices Web API is installed.

- Create a database user for the Web API
- Give the database user permissions to check performance counters
- Configure the bindings for the Web API web sites
- Adjust Firewall security settings
- Test the web application

Create a database user for the Web API

1. Open Microsoft SQL Server Management Studio as an administrator on the computer where the database is located.
2. Click **Connect** in the **Connect to Server** dialog.
3. In the navigation pane to the left, expand **Security**, right-click **Logins**, and click **New Login**.
4. Click **Search**, type *InvoiceService* in the **Enter the object name to select** box, and click **Check Names**. The search finds the name including the name of the localhost.
5. Click **OK**.
6. Click **User Mapping** in the navigation pane of the **Login - New** dialog.
7. Select the Kofax Invoices database in the list under **Users mapped to this login** (*INV_60* for the sake of this example).
8. In the **Database role membership for: INV_60** settings box, ensure **db_owner** is selected.
9. Click **OK**.

Give the database user permission to check performance counters

The database user needs permission to check performance counters.

1. Open the **Computer Management** console on the server where the database is located.
2. Expand **Local Users and Groups** and double-click **Performance Monitor Users** to open it.
3. Click **Add**, type *InvoicesService* in the **Enter the object names to select** box, and click **Check Names**.
4. When the user is found, click **OK** twice.

Configure the bindings for the Web API web sites

1. Open Microsoft Internet Information Services (IIS) Manager.
2. In the **Connections** pane on the left, expand the name of the localhost found directly under **Start Page** (starts with WIN-...) and then expand **Sites**.
3. Select **Default Web Site** and then click **Bindings** in the **Actions** pane to the far right in the window.
4. In the **Site Bindings** dialog that displays, click **Add**.
5. Select **https** under **Type**. The port number changes to **443** and the **SSL certificate** setting appears.
6. Under **SSL certificate**, select the certificate that was created for Kofax Invoices Web API (**IdentityServerCert**).
7. The row containing the binding setting for port 80 can be removed.
8. Click **OK** and then **Close**.
9. Under **Sites** again, select **Identity Server** and then click **Bindings** in the **Actions** pane to the far right in the window.
10. In the **Site Bindings** dialog that displays, select the binding for the port specified previously for the identity server (2102 in this example), and click **Edit**.
11. Under **SSL certificate**, select the certificate that was created for Kofax Invoices Web API (**IdentityServerCert**).
12. Click **OK** and then **Close**.
13. Under **Sites** again, select **Invoices Web API** and then click **Bindings** in the **Actions** pane to the far right in the window.
14. In the **Site Bindings** dialog that displays, select the binding for the port specified previously for the Web API server (54051 in this example), and click **Edit**.
15. Under **SSL certificate**, select the certificate that was created for Kofax Invoices Web API (**IdentityServerCert**).
16. Click **OK** and then click **Close**.

Adjust Firewall security settings

Open the appropriate ports to allow access to the Web API web sites through the firewall.

1. On the computer where the Web API is installed, start **Windows Firewall with Advanced Security** component.
2. In the navigation pane on the left, click **Inbound Rules**, and in the **Actions** pane on the right, select **New Rule**.
3. Select **Port** as the **Rule Type**, and click **Next**.
4. In the **Protocol and Ports** dialog, select **TCP** and in the **Specific local ports** box, type the port numbers specified earlier (2102, and 54051 for this example). Click **Next**.
5. Click **Next** in the **Action** dialog and **Next** in the **Profile** dialog.
6. In the **Name** box on the **Name** dialog, type *InvoicesAPI*, and click **Finish**.

Test the web application

1. Open the browser and in the address field, type the URL to the Invoices Web API including the IP address in the format `https://123.45.6.78/invoicesapi/invoices` and press **Enter**.
2. Users will normal log in using their user account information that is defined in Kofax Invoices, but for testing purposes, you can log in with the *admin* user account as long as the default password for it in Kofax Invoices is changed to something else such as *secret2*.

Chapter 5

Troubleshooting

If the web application does not work, check the following items.

Start the Web API as an administrator

1. In Windows Explorer, navigate to `C:\Program Files\Kofax\Invoices\WebAPI` and start the program `INVOICESWebApi.exe`.
2. A command window opens and the application runs. Close the window when the action is complete.

Check the ImageOverridePath in appsettings.json

1. In Windows Explorer, navigate to `C:\Program Files\Kofax\Invoices\WebAPI` and start the program `INVOICESWebApi.exe`.
2. Ensure the following string includes the path to the image file.
`"ImageOverridePath": "",` such as `"ImageOverridePath": "C:\\InvoicesImg\\
\\ident",`

 The path must include double backslashes (\\) between folders.

3. Save the file.

Acquire and install an SSL certificate for the web sites

The web sites created by the installation process require an SSL certificate in the domain to be able to access the web sites created by the installation process in the domain. If the person installing the Web API does not manage SSL certificates for the domain, they need to ask the person who does to acquire the certificate and install it on the server. The name of the certificate for the example in this manual is *InvoicesServiceCert*.