

Kofax eFlow

Administstrate User Guide

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KOFAX

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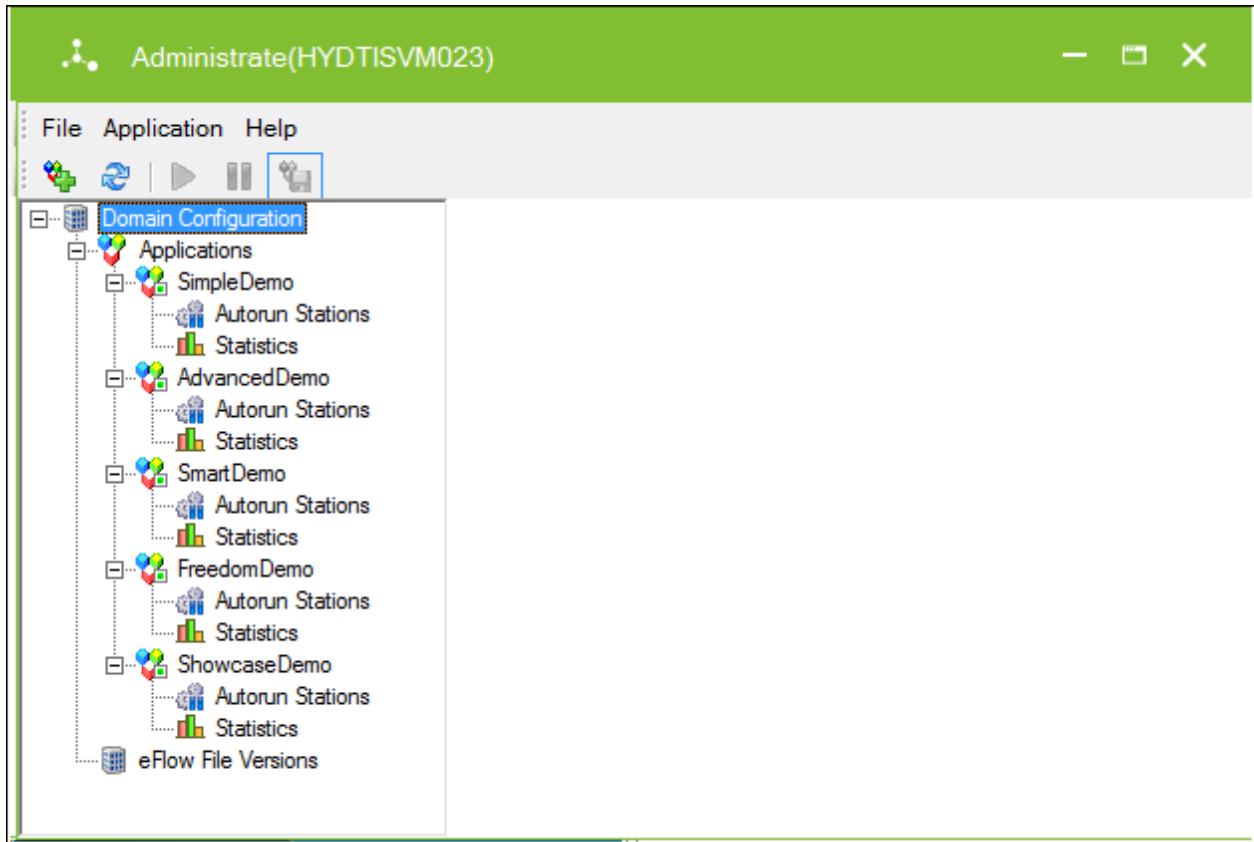
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Preface

The eFlow Administrate module enables you to manage your eFlow licenses, applications, autorun stations and generate statistics. In this module you can install and uninstall licenses, create and delete applications, and add and remove autorun stations as per your requirements.

Open Administrate

To open Administrate module, in eFlow Launch Pro, select **Administrate** from the **Tools** list.



Manage licenses

To view and manage your eFlow licenses, right-click on the **Domain Configuration** node and select **License**.

The **License Management** dialog box lists the number of available licenses and the number of licenses currently in use for each eFlow server in the domain.

Refer "eFlow licensing" chapter in *Kofax eFlow Configuration Guide* for detailed information on licensing mechanism.

The screenshot shows the 'License Management' dialog box with the following details:

- File View License**
- Buttons:** Refresh, Install, Uninstall
- License expires:** Monday, August 7, 2017
- License ID:** 1248D-7946B-4FA13-48DB8-282BF
- Server Status Table:**

	Server name	Status
▶	TIS-APP1	Activated
▶	TIS-APP2	Activated
- Feature Usage Table:**

Group name	Feature name	Total allow	Current in use
▶ Stations	AutoStations	100	80
▶ Stations	ControlStations	5	3
▶ Stations	CustomStations	100	0
▶ Stations	DashboardStation	5	0
▶ Stations	DevelopStations	100	0
▶ Stations	ExportStations	100	0
▶ Stations	InputStations	100	0
▶ Stations	ScanStations	100	0
Manual Stations	ManualStations	500	0
Recognition Ser...	FuzzyServer	100	0
Recognition Ser...	efCheckReaderService	0	0
Recognition Ser...	efFreedomService	0	0
Recognition Ser...	efIntegraService	100	60

Request a license

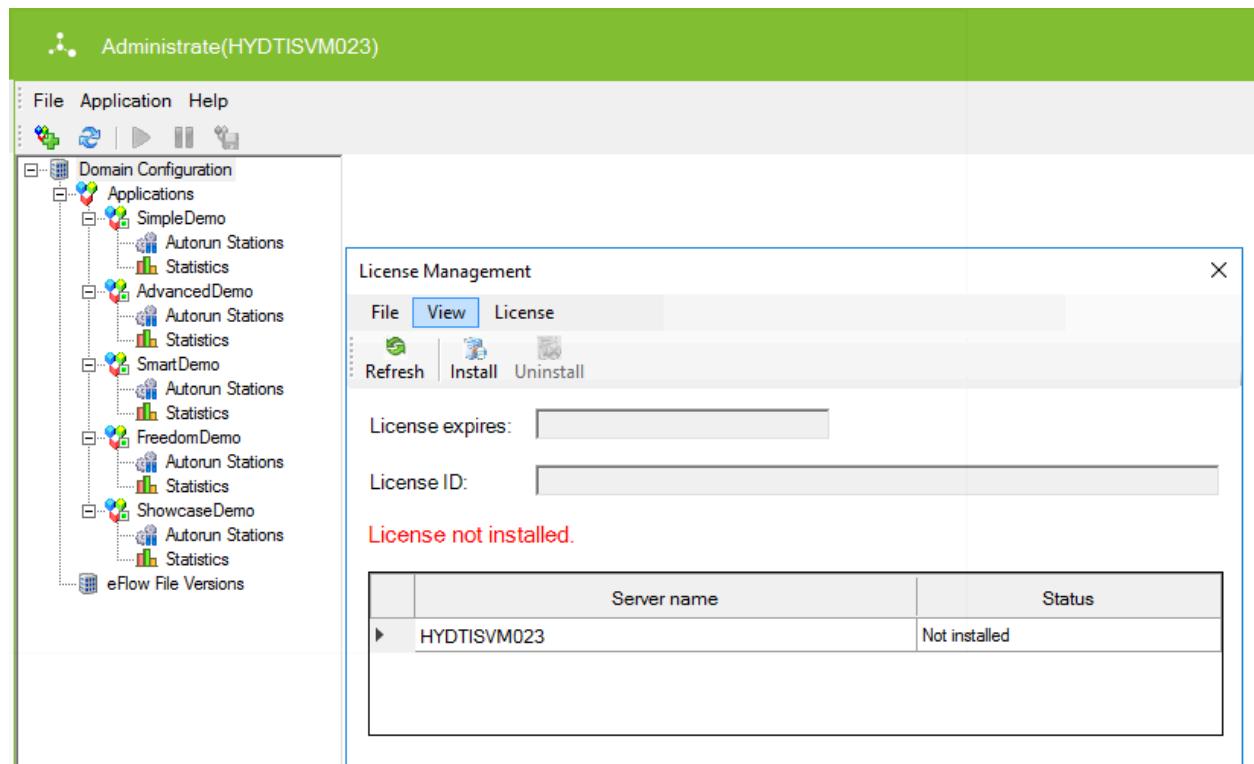
You can create a license request using the eFlow License web site: <http://license.topimagesystems.com>

As login is required, submit an IT ticket to request login credentials. After necessary approvals, the license is sent to you by email. Customers and partners should contact their Kofax representative to request a license.

You must install and activate the new license.

Install a license

1. In the **License Management** dialog box, click the **Install** button.
2. Enter the license expiration date and the license ID.



After the license installation, the **License Management** dialog box displays all available eFlow servers with the status **Not activated**. Every eFlow license is fully functional for seven days after its installation. To continue working beyond the trial period, you must activate the license.

The screenshot shows the 'License Management' dialog box. At the top, there's a menu bar with 'File', 'View', and 'License'. Below the menu are three buttons: 'Refresh' (green circle), 'Install' (blue square), and 'Uninstall' (red triangle). A message box displays 'License expires: 30 August 2021' and 'License ID: 48278-EC901-598EC-27485-1663D'. A red warning message states: 'Your activation period has expired and at least one server has not been activated.' Below this, a table lists active servers:

	Server name	Status
▶	HYDTISVM023	Activation period expired

Below the server list is another table showing feature usage statistics:

	Group name	Feature name	Total allow	Current in use
▶	Stations	AutoStations	99	0
	Stations	ControlStations	10	0
	Stations	CustomStations	99	0
	Stations	DashboardStation	10	0
	Stations	DevelopStations	99	0
	Stations	ExportStations	10	0
	Stations	InputStations	10	0

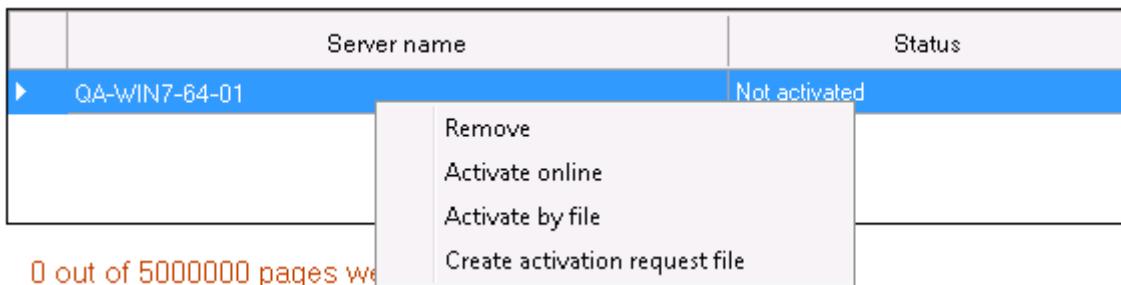
Activate a license

A new license is fully functional for seven days following its creation. After that, you must activate the installed license. During the license activation, the eFlow servers that belong to the current license are registered on the License server.

After successful activation, the **License Management** dialog box displays information about the installed license and active eFlow servers. The expiration date is set as defined in the license.

Important In a multi-server configuration, repeat the activation procedure for each eFlow server.

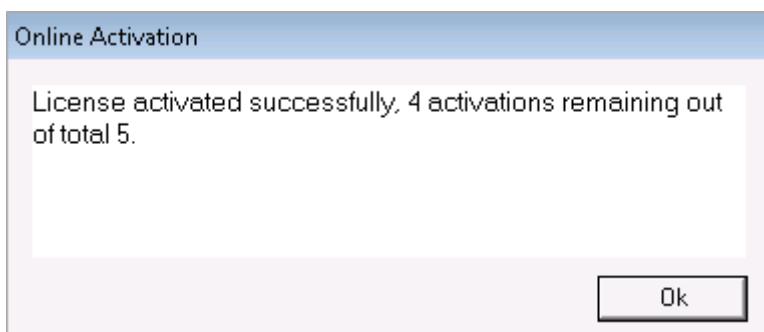
To activate a license, in the **License Management** dialog box, select one of the activation methods from the **License** menu.



Activate online

We recommend using online activation if an Internet connection is available. This is the most simple and straightforward method.

Allow about half a minute for the procedure to complete. A dialog box displays the results of the activation attempt.



Activate by file

Offline activation is achieved via e-mail communication, as shown below:



To activate the license by file:

1. Select the **Create activation request file** menu item to create an activation request file (.ACT_REQ).

2. Send the newly created activation request file to the automatic license activation e-mail address: activation@topimagesystems.com.
You will receive a reply that contains the license activation file (.ACT). Save this file to use later during the activation.
3. From the **License** menu, select **Activate by file**.
4. Open the saved activation file.

Deactivate a license

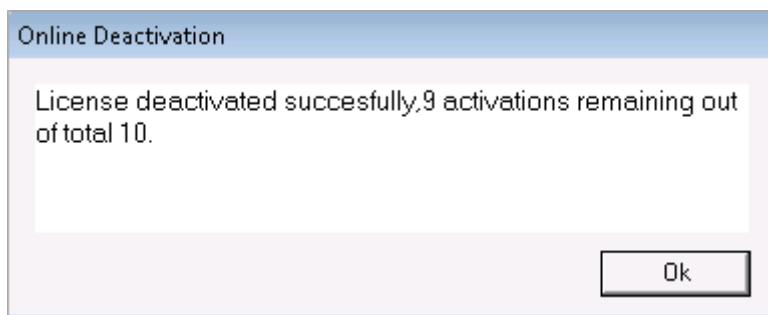
License deactivation is required under the following circumstances:

- One of the eFlow server machines will be replaced.
An active eFlow server must be deactivated before removing it.
As the activations number is limited per license, failure to deactivate a license will not free the activation in use. If the license has reached its limit, further activations will be refused.
- The eFlow license must be uninstalled.
Once all the servers are deactivated, the license can be uninstalled and reused if necessary.

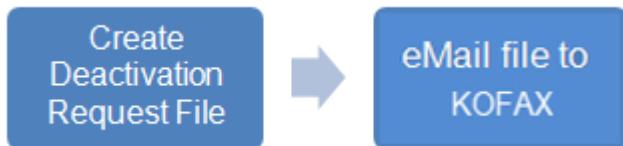
Deactivate online

If an Internet connection is available, it is recommended to perform the online deactivation by selecting **Deactivate Online** from the **License** menu.

The process should take several seconds, at the end of which a message shows the remaining activation for the license.



Deactivate by file



1. In the absence of an Internet connection, you must select **Create deactivation request file** from the **License** menu. This command will deactivate the server locally and create the deactivation request file.
2. To finish the deactivation procedure, send the deactivation request by email to the automatic license address: Activation@topimagesystems.com
You will receive a reply from above email address containing a confirmation that the deactivation has been registered successfully. No further action is required on your part.

Uninstall a license

In the **License Management** dialog box, click the **Uninstall** button.

Note The **Uninstall** button is not available for active licenses. You must deactivate a license before you can uninstall it.

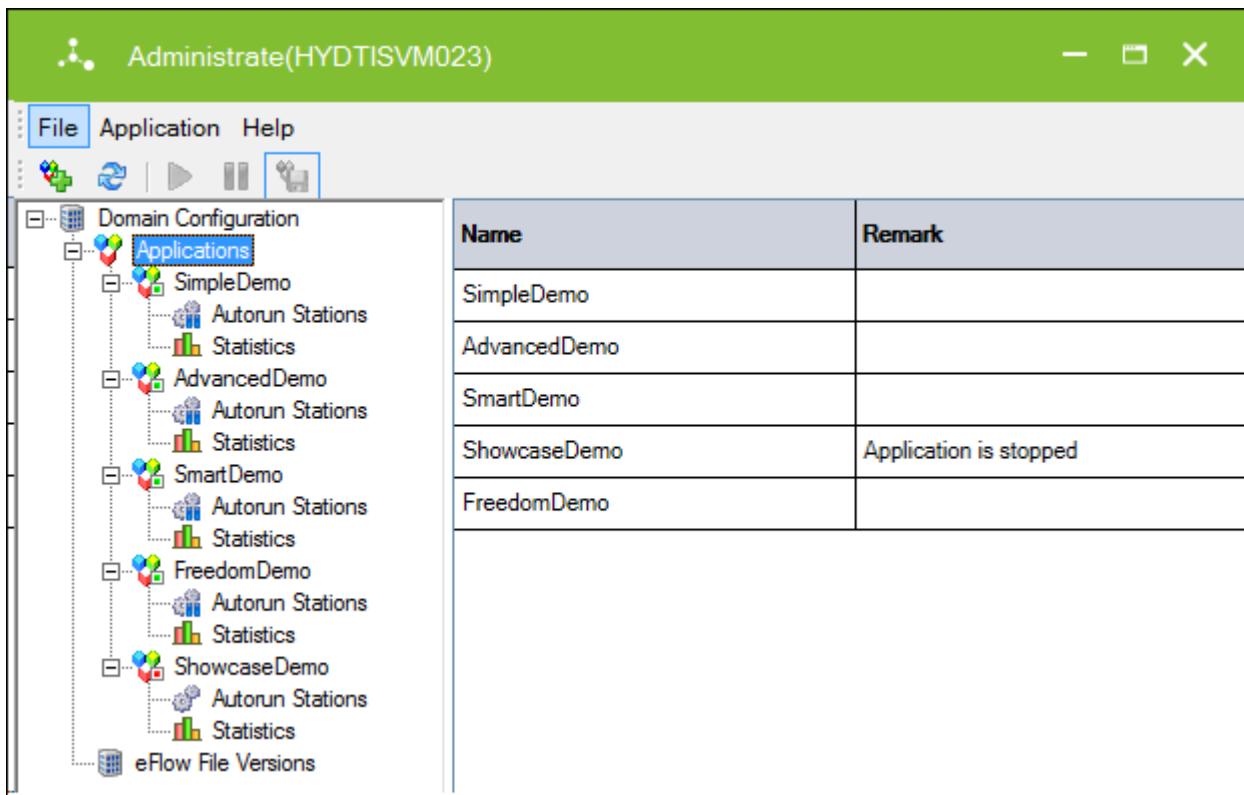
Reinstall a license

1. Deactivate and uninstall the existing license.
2. Install a new license or reinstall the old one.

Manage applications

eFlow applications are configured in the eFlow Design module but cannot be created or activated there. To create a new application, or to make an existing application available in eFlow Launch and eFlow Launch Pro, you must add the application in the Administrate module.

To view all applications available in the domain, click on or expand the **Applications** node. The **Remarks** column displays system messages.



The screenshot shows the Administrate module interface with a green header bar. The main window has a toolbar with icons for File, Application, Help, and various system functions. On the left is a tree view under 'Domain Configuration' with nodes for 'Applications', 'SimpleDemo', 'AdvancedDemo', 'SmartDemo', 'FreedomDemo', 'ShowcaseDemo', and 'eFlow File Versions'. The 'Applications' node is selected and highlighted in blue. To the right is a table with two columns: 'Name' and 'Remark'. The table lists six applications: SimpleDemo, AdvancedDemo, SmartDemo, ShowcaseDemo, FreedomDemo, and ShowcasesDemo. The 'ShowcaseDemo' entry has a remark 'Application is stopped'.

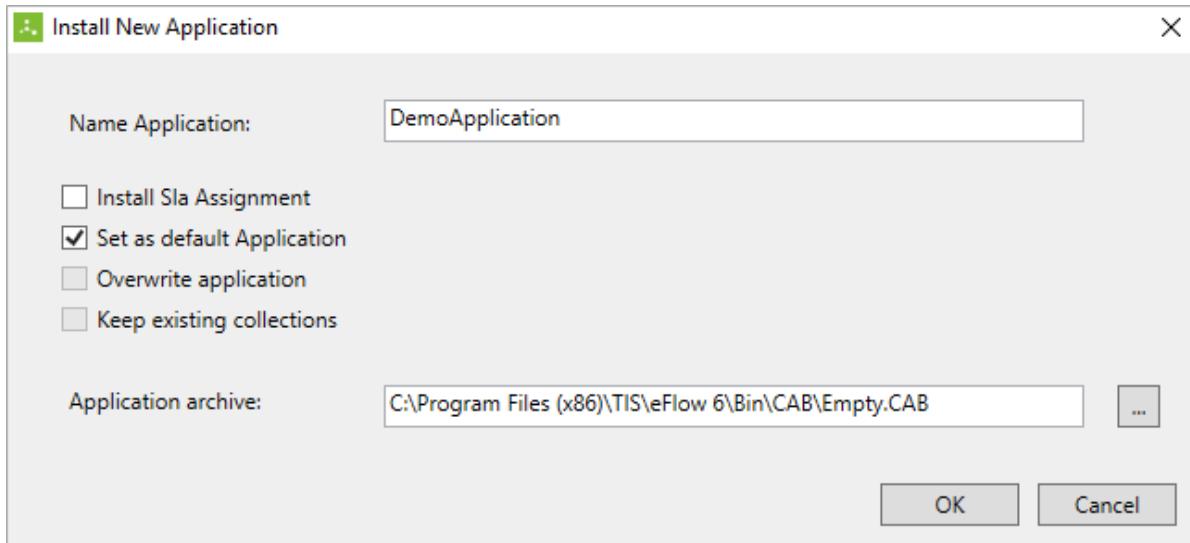
Name	Remark
SimpleDemo	
AdvancedDemo	
SmartDemo	
ShowcaseDemo	Application is stopped
FreedomDemo	
ShowcasesDemo	

Add an application

The following procedure details how to create an application in Administrate module.

1. Click the **New Application** button .
2. In the **Install New Application** dialog box, enter a name for the application.

3. In the **Application archive** field, enter the name of the application CAB file, or click the **Browse** button  to search for the file. If you are creating a new application, select the Empty.CAB file in the folder C:\Program Files (x86)\TIS\ eFlow 6\Bin\CAB



4. Optional. Select the following options.

Option	Description
Install SLA Assignment	Select this option to install the SLA assignments defined for the application in the eFlow Supervise module. Refer to the <i>Kofax eFlow Supervise User Guide</i> for information on SLA assignments.
Set as default Application	Select this option to set this application as the default application. The default application is automatically selected when users start eFlow Launch or eFlow Launch Pro.
Overwrite application	This option is only available if you enter the name of an application that already exists in Administrate. Select this option to confirm that you want to overwrite the existing application, otherwise you cannot save the new application. If you do not want to overwrite the existing application, enter a different name in the Name Application field.
Keep existing collections	This option is only available if you enter the name of an application that already exists in Administrate. If you choose to overwrite an existing application, select this option to retain all collections currently in that application.

5. Click **OK**.

Copy an application

You can copy an application in Administrate and then make changes to the copy in the eFlow Design module.

1. Right-click on the application and select **Duplicate**.
2. In the **Duplicate application wizard** dialog box, enter a name for the application.

3. Optional. Select the following options.

Option	Description
Set as default Application	Select this option to set this application as the default application. The default application is automatically selected when users start eFlow Launch or eFlow Launch Pro.
Duplicate users security info	Select this option to copy the user security settings of the application. Security settings specify which operator workstations, services, and roles are accessible throughout the application and are defined in the Design module.

4. Click **OK**.

Export an application

You can export the CAB file of an application, for example, if you want to install it in another system or environment.

1. Right-click on the application and select **Export**.
2. Browse to the folder where the CAB file should be saved, then click the **Save** button.

Delete an application

Important Deleting an application is an irreversible procedure. It removes everything from the system that is related to the application, including the CAB file, collections, folders on the server and clients, and databases.

1. Right-click on the application and select **Delete**.
2. Click **Yes** when prompted to confirm the deletion.

Stop and restart an application

Occasionally you may want to stop an application, for example, for maintenance or testing. Stopped applications are not available in eFlow Launch and Launch Pro and it is not possible to run the application's stations.

Note Before stopping an application, make sure that there are no collections in the application, and logout all the application's stations using the Control module. If you use autorun stations, disable autorun first (see [Manage autorun stations](#)).

To stop an application, right-click on it and select **Stop**.

The application icon changes from green  to red  to indicate that the application has been stopped.



To restart the application, right-click on it and select **Start**.

Prevent or allow new logins

You can prevent additional users from logging in to manual stations, for example, to prevent poor system performance when system resources are overloaded. Users currently working with the application are not affected by this action.

To prevent new logins to the application, right-click on it and select **Lockout Logins**.

To allow new logins again, right-click on the application and select **Allow New Logins**.

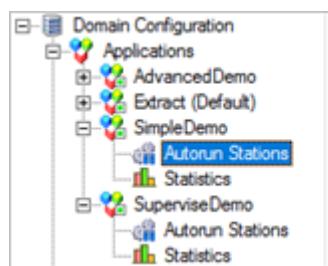
Export the applications list

To export the list of applications to a text file, right-click on the **Applications** node and select **Export applications list**.

Manage autorun stations

To run a station automatically, you must select the **StandBy** and **Allow Unattended** parameters in the Design module Workflow Designer.

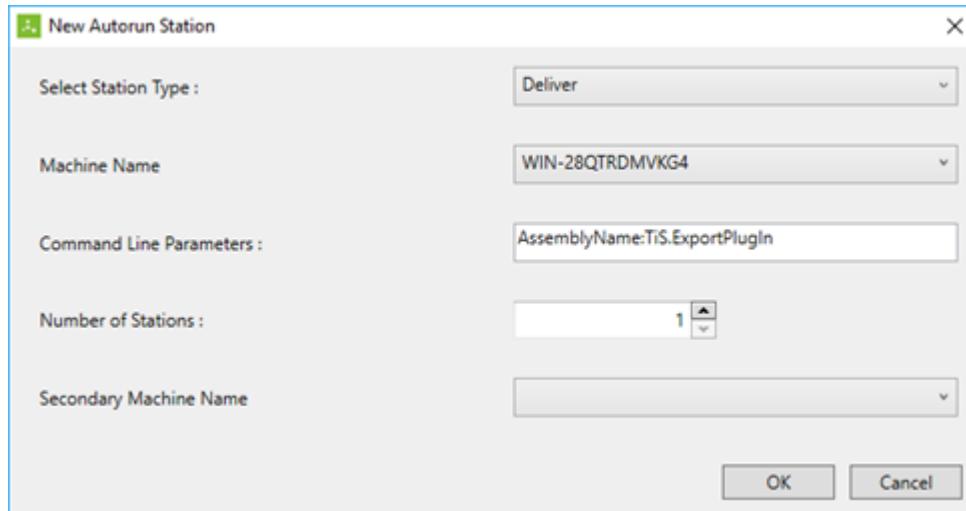
You can add additional instances of autorun stations to the application to spread the load and speed up processing.



Station Type	Primary Node	Command Line parameters	Number of Statio	Secondary Node
Recognize	WIN-28QTRDMV	AssemblyName:TiS.Recognition	1	
Recognize	WIN-28QTRDMV	AssemblyName:TiS.Recognition	1	
Deliver	WIN-28QTRDMV	AssemblyName:TiS.ExportPlugin	2	

Add an autorun station

1. Right-click on the **Autorun Stations** node and select **Add Autorun Station**.
2. In the **New Autorun Station** dialog box, select the station type and the machine on which the station should run.



3. Optional (for advanced users only). Enter any command line parameters you want to use. These command line parameters are defined in the Design module.
4. Select the number of stations to run.

5. Optional. Select a secondary machine name. The specified number of station instances will run on this machine if there is a problem with the primary machine.
6. Click **OK**.
7. Right-click on the **Autorun Stations** node and select **Enable Autorun**.

Remove an autorun station

1. If autorun is enabled, right-click on the **Autorun Stations** node and select **Disable Autorun**.
2. In the **Autorun Stations** list, select the stations you want to remove.
3. Right-click and select **Remove selected stations**.

Export and import the Autorun Stations list

The autorun stations configuration is not preserved when you update an application, so it is advisable to export the configuration to a file before updating and then import the file after the update.

To export the list of autorun stations to a text file, right-click on the **Applications** node and select **Export Autorun Stations list**.

To import an autorun stations list, right-click on the **Applications** node and select **Import Autorun Stations list**, then navigate to and select the text file.

Generate statistics

You can generate statistics for an application and view them in a statistics reporting tool of your choice. The generated statistics are stored in a Microsoft SQL database. For detailed information on the Statistics database, refer to the "Statistics database" section in *Kofax eFlow Configuration Guide*.

To generate statistics, click on the **Statistics** node, then enter and save the [settings](#).

The **Remarks** column displays system messages.

Note You cannot configure statistics generation if the application is stopped (see [Stop and start an application](#)).

Statistics settings

1. Select the **Enable statistics** check box.

Statistics settings		Cleanup Settings																					
<input checked="" type="checkbox"/> Enable statistics Select Statistics Data Storage Type <input type="button" value="MSSQLStorage"/>																							
DBConnectionString DatabaseName: SimpleDemo_Statistics IntegratedSecurity: <input type="checkbox"/> Password: <input type="password"/> •• ServerName: UserName: sa																							
<table border="1"> <thead> <tr> <th colspan="3">Statistics Type</th> <th>Remark</th> </tr> <tr> <th>Active</th> <th>StatType</th> <th>Remark</th> <th></th> </tr> </thead> <tbody> <tr> <td><input checked="" type="checkbox"/></td> <td>ManualFormId</td> <td></td> <td></td> </tr> <tr> <td><input checked="" type="checkbox"/></td> <td>Operator Counters</td> <td>***</td> <td></td> </tr> </tbody> </table>				Statistics Type			Remark	Active	StatType	Remark		<input checked="" type="checkbox"/>	ManualFormId			<input checked="" type="checkbox"/>	Operator Counters	***					
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Active	StatType	Remark																					
<input checked="" type="checkbox"/>	Login/Logout	***																					

2. In the **DBConnectionString** section, enter a name for the statistics database, and enter details of the connection to your SQL server. The database is created on this server. To use domain authentication, select the **IntegratedSecurity** check box. When selected, the user running eFlow does not have to provide a password; the credentials of the user that runs the process are used, such as the TISApp pool user.
3. In the **Statistics Type** area, select the appropriate check boxes for each type of statistics that you want to generate.

Statistics type	Description
ManualFormId	Statistics related to the eFlow Organize station, such as the number of forms and pages processed by operators within a given time.
DataEntry	Statistics related to the eFlow Validate and Escalate stations, such as the number of modified or typed fields or the number of forms learned by operators within a given time. Refer to the <i>Kofax eFlow Validate User Guide</i> for more information on the Validate station. Select the appropriate check box to generate statistics related to Operators , Fields , or Forms .
Compare	Statistics comparing the original value of fields (usually the value just after OCR) and the final value (value during export).
CollectionAudit	Statistics related to the flow of collections through the system. Each lock, unlock, split, merge, and stream of data from server to client and from client to server is logged.
SessionsAudit	Statistics related to the usage of stations, such as login and logout times.

Cleanup Settings

You can automatically remove statistics data from the database that is older than a specified number of days, or manually remove the data at any time.

To automatically remove statistics data, in the **Purge statistics data older than** field, enter the number of days, then click **Save settings**.

To manually remove statistics data, enter the number of days, then click the **Cleanup statistics now** button.

View file versions

To view file versions, click on the **eFlow File Versions** node. This table displays the version, creation date and file size of all files in the eFlow Bin folder.