



Kofax Copitrak

System Software - Server Installation Guide

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KOFAX

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Preface

This guide provides instructions for administrators who are responsible for installing Kofax Copitrak System Software (CSS) on a server.

System requirements

System requirements are listed in the *Technical Specifications* document, which is available from the [Kofax Copitrak Product Documentation](#) site. The document is updated regularly, and we recommend that you review it carefully before installing your product.

Related documentation

Product documentation for Kofax Copitrak 3.4.0 is available here:

<https://docshield.kofax.com/Portal/Products/Copitrak/3.4.0-csb5nx1k32/Copitrak.htm>

Getting help with Kofax products

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

To access the Kofax Knowledge Portal, go to <https://knowledge.kofax.com>.

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

The Kofax Knowledge Portal 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.
To locate articles, go to the Knowledge Portal home page and select the applicable Solution Family for your product, or click the View All Products button.

From the Knowledge Portal home page, you can:

- Access the Kofax Community (for all customers).

On the Resources menu, click the **Community** link.

- Access the Kofax Customer Portal (for eligible customers).
Go to the [Support Portal Information](#) page and click **Log in to the Customer Portal**.
- Access the Kofax Partner Portal (for eligible partners).
Go to the [Support Portal Information](#) page and click **Log in to the Partner Portal**.
- Access Kofax support commitments, lifecycle policies, electronic fulfillment details, and self-service tools.
Go to the [Support Details](#) page and select the appropriate article.

Chapter 1

Introduction

This guide provides instructions to install the Kofax Copitrak System Software (CSS) Server on a computer or server running the Microsoft Server operating system with a local or remote Microsoft SQL Server.

Prerequisites

The following prerequisites must be met before starting a CSS Server installation. Copy the CSS installation packages to the server desktop prior to starting the installation.

- Latest Windows updates installed on the server
- CSS installation package
- CSS Server license
- SQL Server Management Studio installed on the CSS Server
- .NET Framework 4.8 runtime must be installed before starting CSS Installer script
- An instance of SQL Server or Express with administrator credentials
- Local Administrator account name and password

Microsoft Server information (CSS Server)

 CSS cannot be installed on a Domain Controller.

The following information is used by the CSS installer during the installation process and is required prior to starting the installation:

- User name with full administrator rights
- Computer name
- Static IP address
- Local administrator name
- Local administrator password

Microsoft SQL Server information

CSS requires a Microsoft SQL Server for the Copitrak ERS database. This SQL Server may reside locally on the CSS Server or on another Microsoft server.

It is the customer's responsibility to set up and configure the Microsoft SQL Server. This should be done by a certified database administrator (DBA).

To create data tables and set rights, the CSS installer requires an SQL user ID with full administrator rights.

- SQL Server name
- SQL Server instance ID
- Server IP address
- SQL User ID
- Password

Notes on SQL Server names and instances

- You can install multiple copies of an SQL Server on a single hardware server running a Microsoft server.
- Each copy, or instance, of the SQL Server requires a unique name.
- The first installed SQL Server is the default SQL Server or default instance and takes the hardware server's name.
- SQL Server Express Editions are always installed as a named instance, even if you only have one. The instance name, by default, is SQLEXPRESS.

Chapter 2

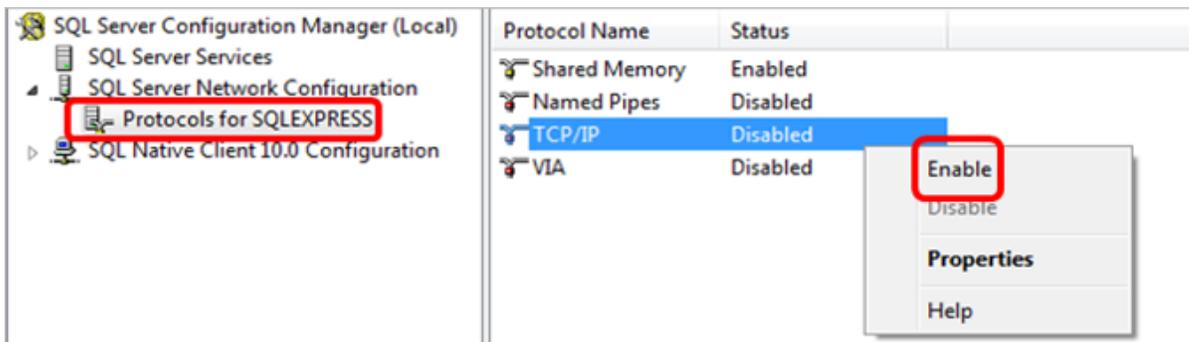
SQL Server Configuration

This section describes the configuration of the SQL Server to prepare it to accept the installation of the ERS database.

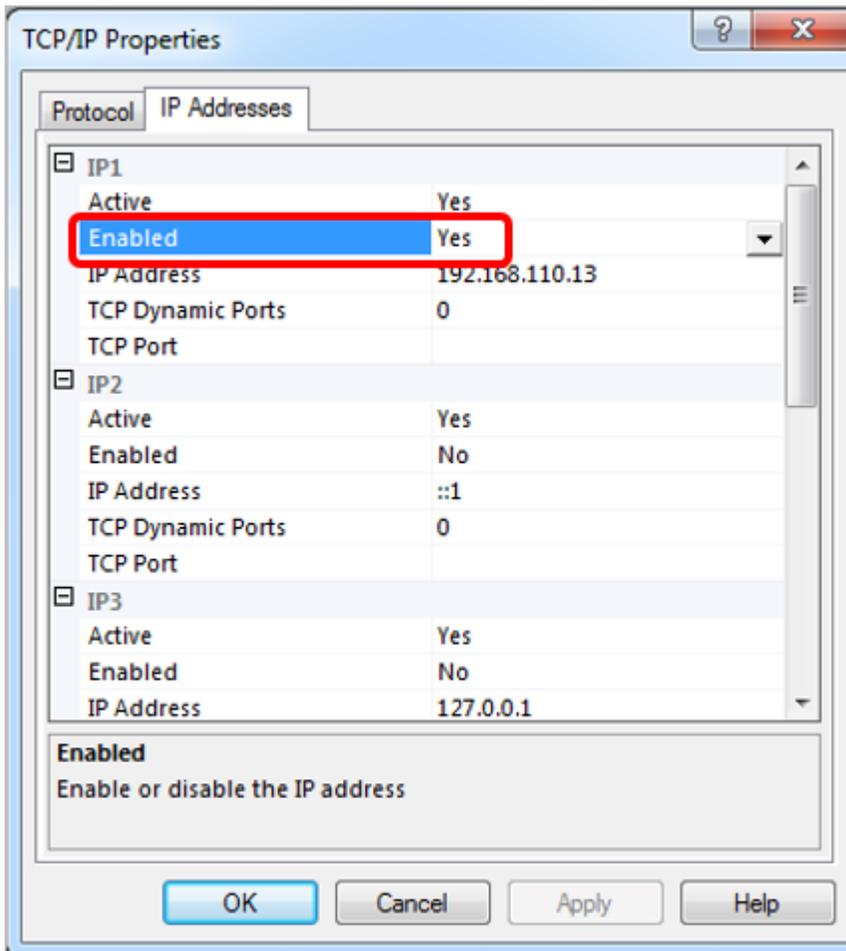
1. TCP/IP configuration
2. SQL server authentication

TCP/IP configuration

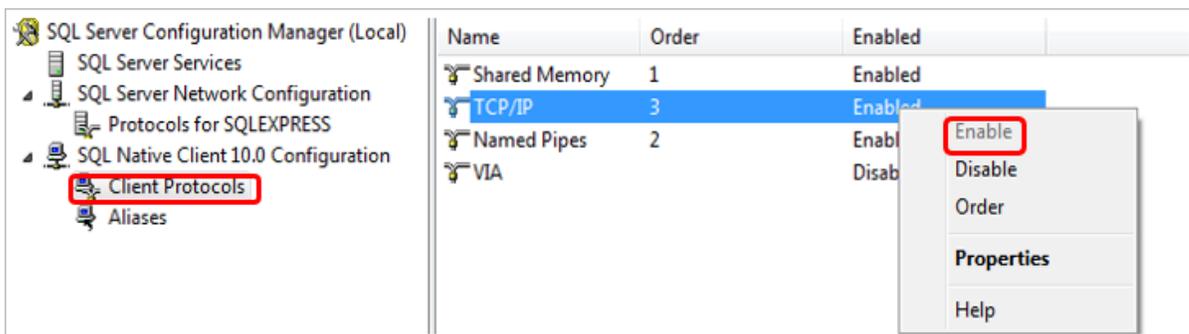
1. Select the **SQL Server Configuration Manager**.
2. Select **Protocols for SQLEXPRESS**.
3. Set **TCP/IP** to **Enable**.



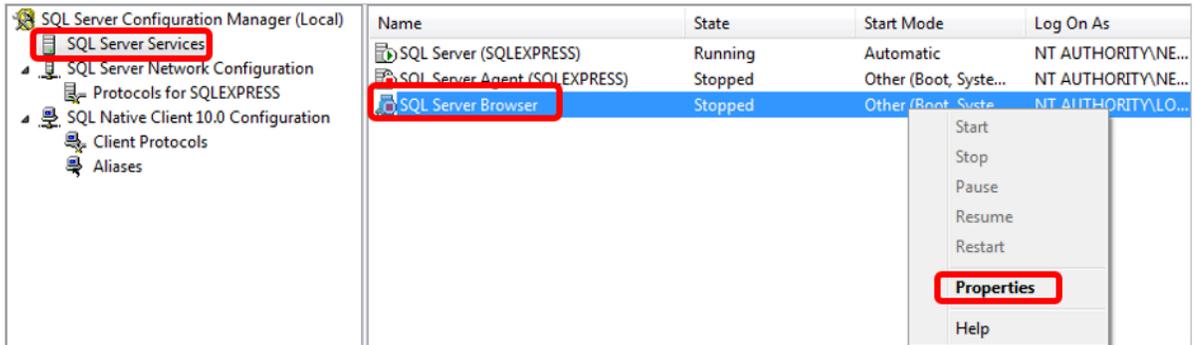
4. Select **TCP/IP** again and select **Properties**.
5. Select the IP address that corresponds to the SQL Server and set **Enabled** to **Yes**. Click **Apply** followed by **OK**.



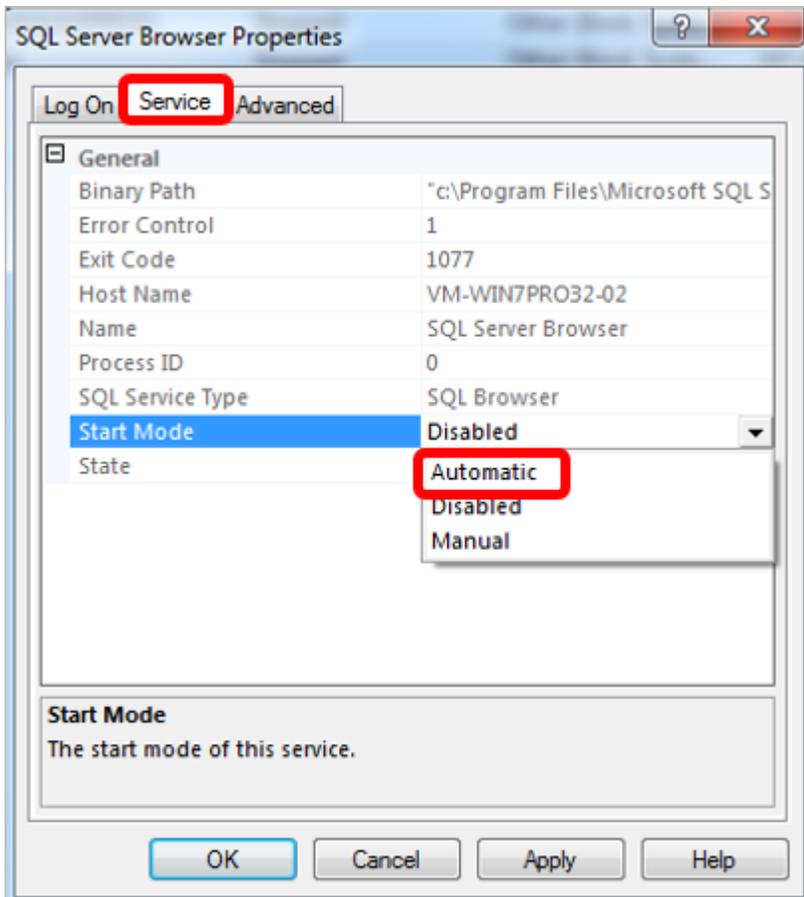
6. Expand **SQL Native Client 10.0 Configuration** and select **Client Protocols**.
7. Select **TCP/IP** and right-click to make sure it is set to **Enabled**.



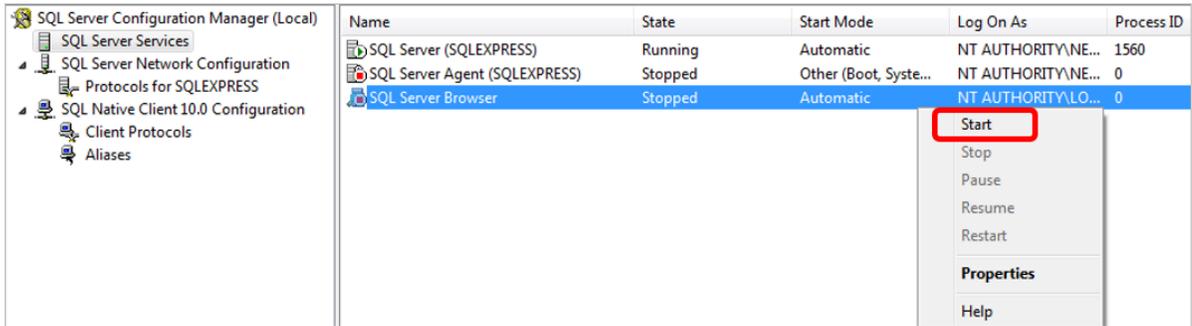
8. To enable the SQL Server Browser Service, select **SQL Server Services** and then select **Properties** for **SQL Server Browser**.



9. Select the **Services** tab and set the **Start Mode** to **Automatic**. Click **Apply**, and then click **OK**.



10. Select **SQL Server Browser** again and right-click to set the **State** to **Start**.



i If the SQL Server is stopped, then click **Start** or **Restart** the service.

SQL server authentication

The Kofax CSS does not support Windows authentication as an authentication method to connect to SQL Server. For this reason, make sure your SQL Server supports mixed mode authentication.

Follow the instructions from the [Microsoft website](#) to change the SQL Server authentication mode and set the SQL Server system account password and permissions. These credentials are required during CSS installation.

Chapter 3

CSS installation

The following sections provide detailed instructions to complete the CSS installation.

Installing CSS

Installation is done by running a batch script. The installer script checks the operating system and current IIS configuration first. Based on the return of this check, various IIS components are installed and configured. If a system restart is required after enabling some of these features, the installer will prompt for system restart. If that happens, please restart the system and run the installer script again after restarting. This may take several minutes, so please wait for the installer to continue. During this process, .NET Framework 3.5 is also configured. This configuration may take up to 40 minutes to complete.

i During the installation, the system may restart without warning. In that situation, the installer will automatically resume and proceed after the system is restarted.

The following installation procedure is the same for all versions of the Windows operating systems.

1. Create an installation folder in `X:\ERS\INSTALL`, where X is the drive location of ERS.
2. Download the installer package `KofaxCopitrakCSSServer-3.4.0.zip` and extract the files into the `INSTALL` subfolder.

Make sure the downloaded .zip file is not blocked by doing the following:

- a. Right-click on the .zip file.
- b. Select **Properties**.
- c. Click **Unblock**.
- d. Click **OK**.

i The extracted files must be located in the `ERS\INSTALL` directory.

3. Right-click the `Installer_3.4.0.x.bat` and select **Run as administrator**.
4. After checks for the required .NET Framework and various Windows and IIS features, you are prompted to enter the location of the root directory where ERS will be installed. In this example, it is `C:\ERS`. Press **Enter**.

```
C:\ERS\Install>set /p ers=Root Directory of ERS (Eg: C:\ERS):  
Root Directory of ERS (Eg: C:\ERS): C:\ERS
```

5. The next prompt is to enter the Windows password for the current user. Press **Enter**.

```
C:\ERS\Install>set /p winpass=Please Enter the Windows password for the current  
user:  
Please Enter the Windows password for the current user:
```

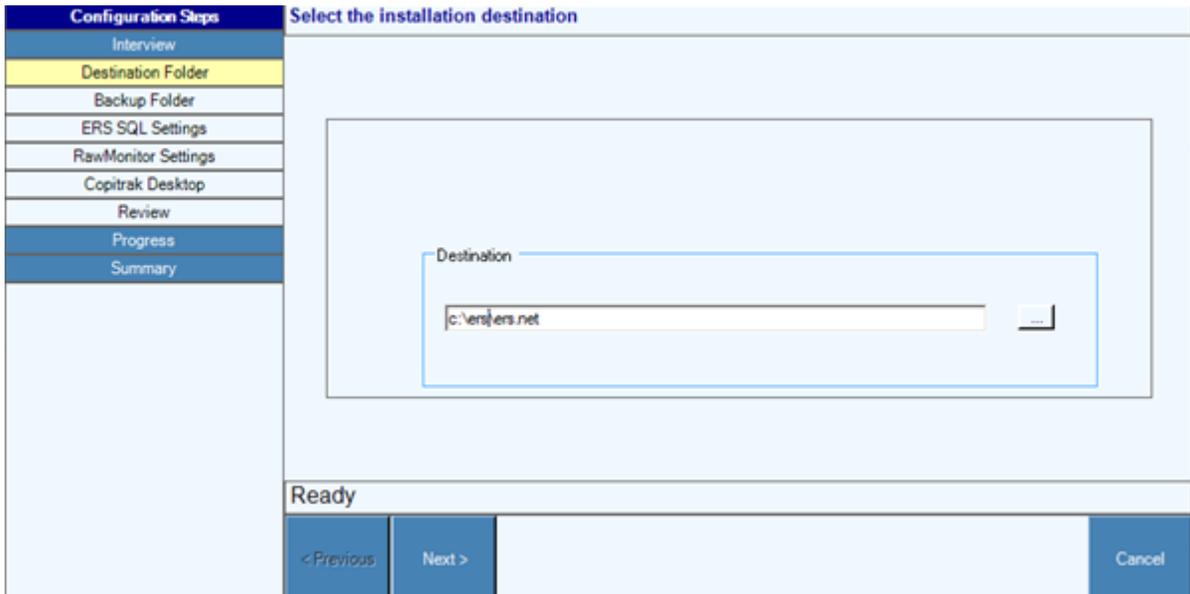
6. The next prompt is to enter the SQL Server name (required) and instance name (if it exists). In this example, the SQL Server name and instance name is VM-WIN7PRO32-02\SQLEXPRESS. Press **Enter**.

```
C:\ERS\Install>set /p sqlserver=Enter the SQL Server Name or IP, and the Instance  
name if applicable (eg: SQLSRU01\SQLEXPRESS or SQLSRU02 ):  
Enter the SQL Server Name or IP, and the Instance name if applicable (eg: SQLSRU  
01\SQLEXPRESS or SQLSRU02 ) VM-WIN7PRO32-02\SQLEXPRESS
```

7. You are then prompted to enter in the **SQL UserName** followed by the **SQL Password**.
At this point, the installer continues installing a number of required runtimes and third-party software. Please observe the progress and wait for the ERS.NET wizard UI.

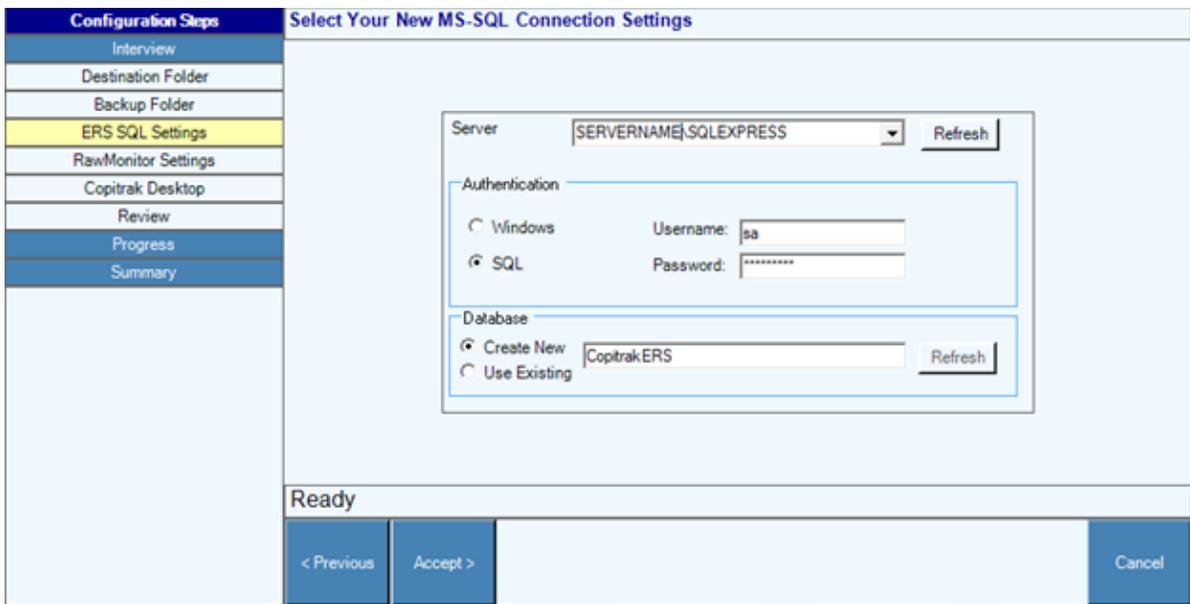
Installing ERS.NET

1. Enter the ERS.NET destination folder and click **Next**. The working directory for ERS.NET is "ers.net".

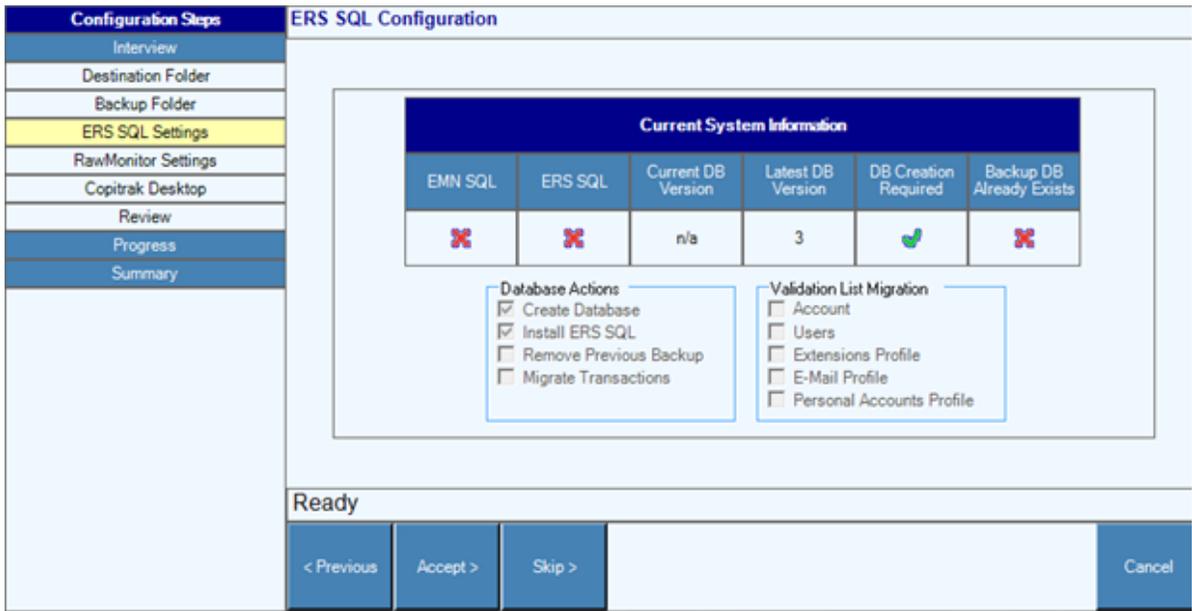


2. Enter the **SQL Server name** and the SQL Server authentication information: **Username** and **Password**. Click **Next**.

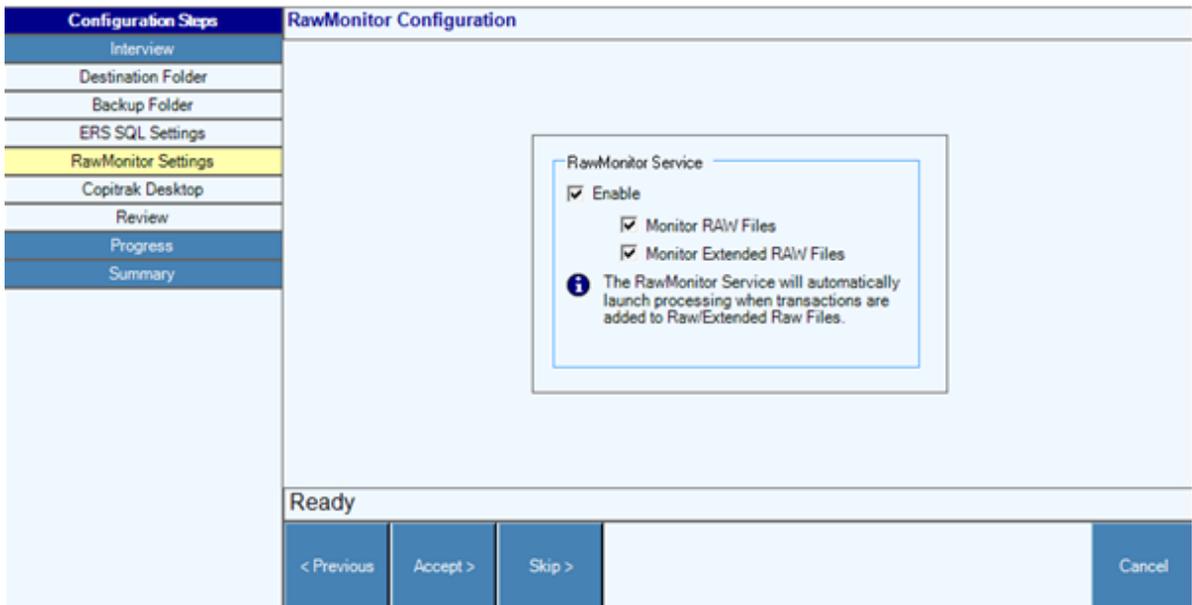
i Do not use Windows authentication mode, which is not supported in CSS.



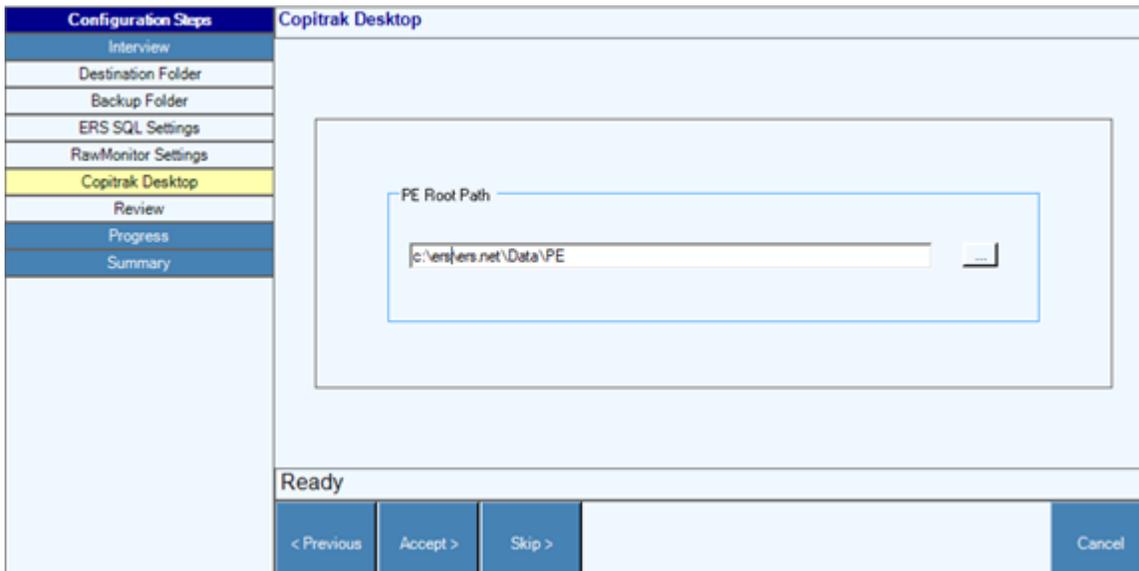
3. The **ERS SQL Configuration** screen is displayed. Click **Accept**.



4. The **RawMonitor Configuration** screen is displayed. Click **Accept**.



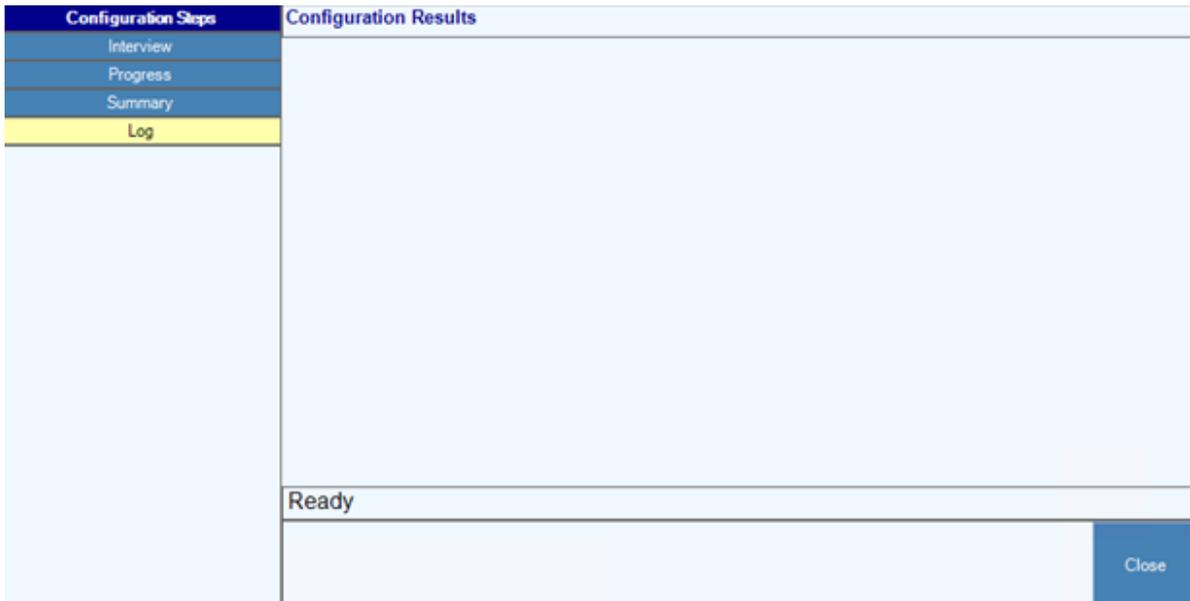
5. The **Copitrak Desktop** screen is displayed. Click **Accept**.



ERS.NET continues running. During this process, it generates some messages in a separate command prompt window. Do not close this window and wait until it completes.

```
Backup Data. 1/18: SUCCESS
Cleanup. 2/18: SUCCESS
Install Files. 3/18: SUCCESS
Install Framework. 4/18: WARNING
Configure Logging. 5/18: SUCCESS
Configure System. 6/18: WARNING
Remove Backup DB. 7/18: SUCCESS
-
```

6. Once the installation is complete, the **Configuration Results** screen is displayed. Click **Close**.



i The installer begins the final installation steps, which include the firewall configuration, IE settings, Explorer settings, installation of .NET 4.0, registering DLLs, setting file/folder permissions, modifications to IIS. Also, SQL scripts are run automatically (from `ers.net\scripts`). A Copitrak folder on the desktop is created and contains shortcuts to all modules. You do not need to modify folder permissions as in previous versions of the installer.

7. Once the installation is complete, you are prompted to press any key to continue.



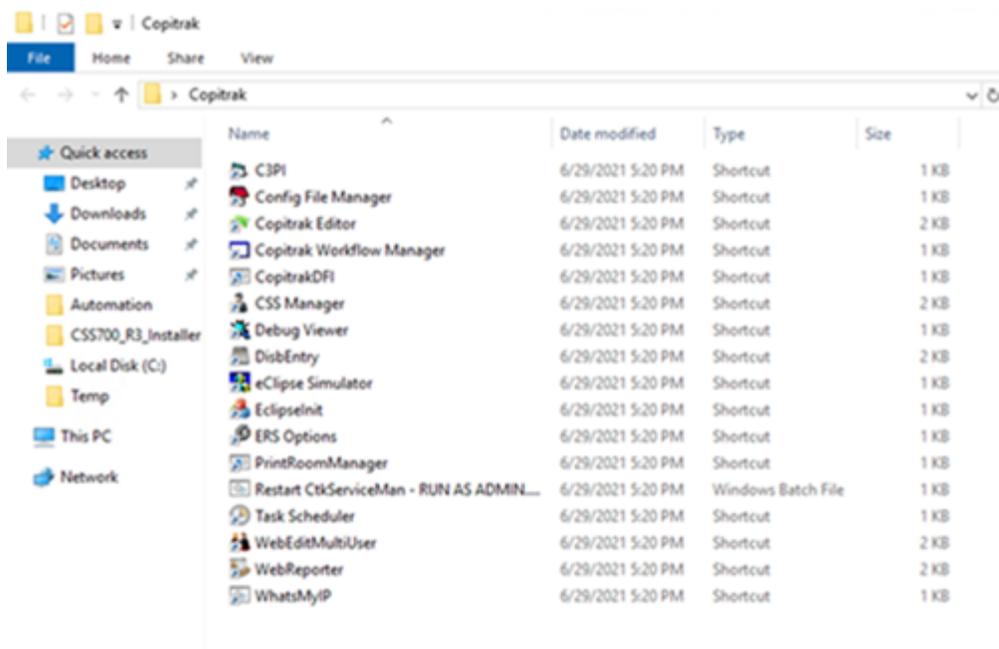
Installing CSS in silent mode

1. Install all required and optional features to avoid a system restart during installation.
2. Create the `c:\ers\Install` folder and unzip the installer package to it.
3. Run the following command from an administrator command prompt:

```
Installer_<version>.bat /qn /<adminpassword> /<sql server user name> /<sql server user password> /<sql server\db instance name>
```

Installation notes

All shortcuts to the common modules are created by the installer on the desktop under a folder called Copitrak.



The ConfigFileManager shortcut is pre-populated with the paths for all configuration files. There will already be empty files for ERS\SERVER\terminal_setup.ini, ERS\WINERS\DRS2005.ini, and ERS\COPITRAKDESKTOP\LT2005_Settings.ini.

i Default pricing is configured. You must update all pricing according to your configuration. Please refer to the readme in the package for the latest versions included.

Adding license

1. Locate the license file (*.lic) and copy it to the C:\ERS\LicenseFiles folder.
2. Restart the CSS License Manager service.
3. Open the new desktop Copitrak folder and launch the CSS Manager.
4. Enter the default login ers at the login screen.
5. Click **License Information** in the left menu.

The license information is displayed on the right. If not, the license issue must be addressed.

 The Copitrak Phone licenses are not included with the main license and must be added separately using the same steps.

Chapter 4

Token Vault installation and configuration

Token Vault is a web application hosted by a Windows service. It is used to manage and store authentication tokens, and provide them to other applications that interact with cloud systems. Token Vault also manages authorization provider registrations and user authorizations.

Token Vault is available to create possible workflows where user credentials are required but there is no prompt for credentials, such as scan workflows initiated from the embedded clients and completed by the CSS server. It is also used for sending and receiving emails on behalf of users as part of several different workflows.

Copitrak 3.3.0 or above deploys Token Vault installer to C:\ERS\Install\REDIST\TokenVaultServer folder, from which Token Vault can be installed when needed.

For detailed instructions on how to install and configure Token Vault, see the [Kofax Token Vault Installation Guide](#).

Chapter 5

Configuring CommonSettings.config

The `programdata%\Kofax\Copitrak\Config\CommonSettings.config` file provides a common place to configure global settings for Token Vault and logging.

For Token Vault to work, enter the URL used to run Token Vault to the following key. For example:

```
<add key="TokenVaultUrl" value="https://myhost.acme.com:8381" />
```

For sending emails, enter the Token Vault SMTP Provider ID to the following key:

```
<add key="TokenVaultSmtpProviderId" value="" />
```

For sending emails with the network user that authorized your provider, enter the network user to the following key. For example:

```
<add key="TokenVaultSmtpNetworkUser" value="jane.doe@acme.com" />
```

For reading emails, enter the Token Vault Mail Access Provider ID to the following key:

```
<add key="TokenVaultMailAccessProviderId" value="" />
```

For reading emails with the network user that authorized your provider, enter the network user to the following key. For example:

```
<add key="TokenVaultMailAccessNetworkUser" value="jane.doe@acme.com" />
```

For configuring logging for .NET components in a centralized place:

```
<logger name="*" minlevel="Warn" writeTo="logfile"/>
```

Chapter 6

Log files

LcWinService.exe produces this log file C:\ERS\LogFiles\lcwin\LcWinDotNet.log, which contains logs from the following components:

- LCWIN_NET_EXT.dll
- DMSPlugin.dll (If a DMS Connector is used)
- DMS<type>Helper.dll (If a DMS Connector is used)